



Broad Reach Consulting Group • Accelerating Revenue Growth

Go-To-Market Maturity Assessment

Sample Company

January 30, 2026

Welcome

This report presents a structured analysis of your go-to-market capabilities across 8 categories that determine whether your business can generate consistent, predictable growth or continues executing without the repeatable system that makes growth scalable.

The findings are calibrated to your current stage and sales motion, which means the recommendations reflect what actually matters now, not a generic best-practice checklist. Where the data reveals hard truths, we've stated them directly. That's where the value is.

What You'll Find in This Report:

- Your overall GTM maturity score calibrated to your stage
- Category-by-category performance breakdown across all GTM dimensions assessed
- The cross-cutting pattern that is most constraining your growth right now
- Prioritized 90-day action plan with sequenced initiatives
- Specific quick wins actionable within 7-21 days
- Complete record of your assessment responses

Assessment Disclaimer

About This Assessment

This assessment uses a structured methodology: AI analysis of your responses followed by expert consultant review at each stage before this report reaches you. The human review is not a formality. It is the quality gate that ensures the analysis reflects your actual situation, not a pattern-matched output.

Important Limitations

This assessment is provided for informational purposes and represents a point-in-time analysis based on the responses provided. No warranty or guarantee is made regarding the accuracy, completeness, or applicability of the analysis to your specific situation.

This assessment does not constitute professional advice for specific business decisions. Implementation of any recommendations is at your own discretion and risk, with no guarantee of specific business outcomes or results. To the fullest extent permitted by law, Broad Reach Consulting Group shall not be liable for any damages arising from use of or reliance on this assessment.

Confidentiality & Data Usage

Your assessment responses and organizational information are treated as strictly confidential. We do not share your specific data with third parties under any circumstances. Your responses may contribute to aggregate, fully de-identified benchmarking analysis to improve our methodology. Your organization is never identified or attributable in any such analysis.

Third-Party Information

This assessment may reference industry benchmarks, market data, or best practices derived from third-party sources and aggregated client data. While we believe these references to be reliable, we do not independently verify all external information and make no representations regarding its accuracy or applicability to your specific circumstances.

Assessment Overview

How to Read This Report

This report is structured as a diagnostic, not a scorecard. Each category identifies where your current capabilities stand relative to what companies at your stage actually need to grow, not against an absolute ceiling that ignores where you are today. The findings are sequenced deliberately. The most constraining gaps appear first so you can focus your time and attention on the highest-leverage changes.

Your stage, Growth, was inferred from the company context responses you provided at the start of the assessment, including revenue, team size, customer count, funding stage, and company age. The five stages used are: Pre-Revenue/Seed, Early Traction, Growth, Established, and Mature/Enterprise.

Categories Covered

1. Strategic Clarity & Market Focus
2. Demand Generation & Channels
3. Revenue Operations & Analytics
4. Leadership, Team, & Execution
5. Financial Health & Growth Economics
6. Customer Value & Economic Returns
7. Product & Sales Motion Alignment
8. Customer Success & Net Revenue Retention

Scoring Methodology:

Each category is scored and weighted independently based on what matters most at the Growth stage. Weights shift across stages to reflect where strategic investment actually moves the needle. Your overall score is a weighted average calibrated to Growth companies, not an absolute ceiling. Before any prose in this report was written, a cross-category synthesis identified the single root pattern connecting your category scores and established a shared analytical frame. That is why the findings read as a coherent argument rather than independent assessments.

Your Scores

47.3%

Overall GTM Maturity Score

Developing, Growth Stage



Growth Stage Target: 50-65

Category Breakdown

Strategic Clarity & Market Focus	52%	52%
Demand Generation & Channels	44%	44%
Revenue Operations & Analytics	40%	40%
Leadership, Team, & Execution	44%	44%
Financial Health & Growth	40%	40%
Customer Value & Economic	54%	54%
Product & Sales Motion Alignment	56%	56%
Customer Success & Net Revenue	49.1%	49.1%

Reading Your Scores, Growth Stage Benchmarks:

- **>68.75 (Leading)** - Significantly exceeds Growth stage norms.
- **65-68.75 (Exceeding)** - Outperforming typical Growth companies.
- **50-65 (On Track)** - Meeting Growth stage expectations.
- **46.25-50 (Developing)** - Approaching Growth stage norms.
- **<46.25 (Critical Gaps)** - Below Growth stage expectations; foundational work required.

GTM Maturity Assessment Report

Executive Summary

Sample Company is a Series A provider network management software business preparing to expand its sales team before the foundational systems required to make outbound work actually exist; you have stated that target account alignment, playbook support, and marketing-to-segmentation alignment are your immediate priorities, but at a 47.3% GTM maturity score against a 57.5% stage expectation, the scored evidence shows you have no validated value proposition, no instrumented funnel, no revenue ownership cascade below leadership, and no segment-level unit economics, meaning the expansion you are planning will increase burn without increasing conversion unless those prerequisites are built first.

- You cannot convert more leads to paying customers by adding outbound capacity to a motion that lacks a consistent qualification framework: new sales hires joining now will operate without validated messaging for health plan buyers, without a defined funnel to work inside, and without clarity on whether to prioritize government-sponsored or commercial plan segments first, which is the direct mechanism behind your stated primary growth challenge.
- Your CRM, marketing automation, and handoff SLA are all partially in place, but none of them are connected into a system that can tell you where leads are stalling, which channels are generating qualified pipeline, or why the last ten deals were lost; without that diagnostic layer, every dollar allocated to outbound is being spent without a feedback loop.
- Revenue ownership stops at the leadership level: objectives are not cascaded to individual GTM roles, performance management runs on an annual cycle, and hiring is ad hoc, which means the sales team expansion you are executing will add headcount without adding accountability anchors tied to pipeline outcomes.
- Government-sponsored and commercial health plans carry materially different sales cycles, contract sizes, and procurement dynamics, but you are currently treating them as a single economic unit; without segment-level CAC and average contract value calculated from your last 12 months of closed-won data, you cannot determine which segment to prioritize, how many sellers to hire, or whether your outbound motion is economically viable for either.
- Your existing 11 to 50 health plan customers represent an expansion revenue lever you are not pulling: NRR and GRR are calculated manually and only occasionally, upsell is handled opportunistically, and the outcome data sitting inside those accounts is not being captured or fed into your sales motion, which means you are simultaneously undermonetizing the base and leaving your best source of proof points for new buyer conversion unused.

- Every category in this assessment that scores below stage expectation traces back to a single condition: you are running an outbound sales motion on top of an unbuilt operating system; the path to conversion improvement runs through infrastructure before headcount, and the 90-day window before your sales team expansion accelerates is the last point at which that sequencing can be corrected without compounding cost.

90-Day Action Plan

The sequencing below is built around a single constraint: before Sample Company adds outbound sales capacity, three things must be true that are not true today, specifically that the funnel is defined and measurable, that the value proposition is validated with actual health plan buyers, and that revenue ownership is cascaded to the role level. The first two initiatives address the measurement spine and the messaging foundation in parallel because neither can wait for the other; the third converts those inputs into the playbook and accountability structure new hires will actually operate against.

Initiative: Build the Revenue Measurement Spine

High

Timeline	Effort	Categories
Weeks 1-4	Medium	3 areas

Objective: Define 5 to 7 core revenue metrics, assign named ownership for each, establish a shared dashboard visible to all GTM team members, and implement a structured win/loss review process so that every subsequent GTM decision is grounded in evidence rather than intuition.

Revenue Operations & Analytics is the lowest-scoring category in this assessment at 40%, and it is the dependency everything else sits on top of. You cannot evaluate whether your outbound motion is working, whether your segmentation alignment is improving, or whether your sales team expansion is generating return without a measurement layer in place first. This initiative is designed to be completed in the first four weeks precisely because it is the prerequisite for every other initiative in this plan.

Implementation Steps:

- Define 5 to 7 core revenue metrics covering lead volume by channel, funnel conversion rates by stage, pipeline velocity, win rate, and CAC by segment; assign a named owner for each metric from the existing GTM team.
- Publish the metrics to a shared dashboard accessible to all GTM team members and commit to a weekly review cadence starting in week two.

- Map all existing lead and opportunity records in the CRM against defined funnel stages and identify the stage where the largest volume of records stall or go inactive.
- Pull closed-won deal data from the last 12 months, separate it by plan type (government-sponsored versus commercial), and calculate a documented rough CAC and average contract value for each segment using actual sales and marketing spend.
- Build a structured win/loss review template and complete it retroactively for the last five closed or lost deals, then commit to completing it for every deal going forward.
- Integrate CRM data with outbound and marketing activity data so that lead source, campaign, and channel are traceable to pipeline outcomes; for a team of 2 to 5 GTM members this does not require new tooling, it requires a defined data entry standard and a single source of truth.
- Assign a single owner for Revenue Operations accountability, even as a part-time responsibility, and make that ownership explicit in the weekly team operating rhythm.

Success Metrics:

- 5 to 7 core metrics defined, owned, and visible on a shared dashboard by end of week two.
- Weekly revenue metrics review cadence established and completed for at least three consecutive weeks by day 30.
- Segment-level CAC and average contract value documented for government-sponsored and commercial plan segments separately by day 30.
- Win/loss review completed for the last five closed or lost deals, with a named pattern identified in at least two deal outcomes, by day 30.
- At least one active prospect receives a revised outreach or qualification approach informed by the win/loss findings by day 45.

Why It Matters

Without this measurement spine, the segmentation alignment and playbook development the client has explicitly flagged as priorities cannot be evaluated or iterated; every other initiative in this plan produces directional activity rather than measurable progress until this foundation exists.

Initiatives 2 - 4 Removed from Sample Report

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Maturity Assessment by Category

Strategic Clarity & Market Focus

Score: 52/100

Current State:

Sample Company is preparing to expand its sales team without a validated value proposition, a documented go-to-market strategy, or an ICP that is applied consistently across functions. That combination does not create a scaling problem; it creates a compounding one. New sales hires will self-interpret targeting, marketing campaigns will run against a blurred customer definition, and the conversion problem the company is already experiencing will deepen as headcount increases. The client identified playbook readiness and marketing-to-segmentation alignment as explicit priorities. Neither is achievable while the strategic foundation remains in this condition.

The segmentation challenge is not abstract. Sample Company operates across two structurally distinct markets: government-sponsored plans ranging from 2,500 to 250,000 members, and commercial plans ranging from 25,000 to 1.5 million members. These segments carry different regulatory environments, procurement cycles, and decision-maker profiles. A single blended ICP cannot support precise targeting across both, and the assessment confirms that what exists today is a basic profile derived from early adopters, applied inconsistently across marketing, sales, and customer success. Until those two segments are defined separately and documented precisely, every outbound motion and every campaign alignment effort is operating on an assumption that the market will not reward.

Key Strengths:

- Early segmentation work is underway: qualitative insights have been applied to begin distinguishing between government-sponsored and commercial plan segments, which maps to the distinct member-size ranges the client already describes in their offering.
- Competitive awareness exists at a baseline level: the team can articulate how Sample Company differs from alternatives, which is a prerequisite for building validated differentiation even though buyer confirmation is still needed.

Improvement Opportunities:

- Build a separate ICP for each plan segment the client operates in: government-sponsored plans (2,500 to 250,000 members) and commercial plans (25,000 to 1.5M members) have different regulatory environments, procurement cycles, and decision-maker profiles. A single blended ICP cannot support

precise targeting or campaign alignment across these two distinct markets.

- Validate the value proposition with current customers: conduct structured interviews with existing health plan clients to identify which pain points and outcomes they value most by segment, then use that input to replace generic messaging with buyer-tested language specific to each plan type.
- Develop a documented GTM strategy before expanding the sales team: a rough concept cannot support onboarding, quota-setting, or campaign alignment. A written plan covering segments, channels, and conversion stages is the prerequisite for everything the client says they need.
- Move from annual to quarterly GTM reviews: the current annual review cycle means the strategy can drift out of alignment with market conditions and sales learnings for months at a time, which is too slow for a company at this revenue and growth stage.

Recommendations:

The first action before the next sales hire starts is to produce two separate ICP documents: one for government-sponsored plans and one for commercial plans. Each must specify the relevant member-size range, organizational triggers, regulatory context, disqualifying factors, and key personas. This is not a documentation exercise. Without segment-specific ICPs, new sales team members will default to their own interpretation of who to target, and the inconsistency that currently undermines conversion will be replicated at greater cost and velocity as the team grows.

The second action is to conduct structured discovery interviews with 8 to 12 existing customers within the next 60 days, segmented by plan type. The goal is to capture validated pain points, buying triggers, and decision criteria specific to government-sponsored versus commercial buyers, and then use those findings to build a messaging framework that replaces the generic value proposition language the assessment identified. This directly addresses the lead-to-customer conversion challenge. Outbound sequences will not improve conversion rates until the language in those sequences reflects what each segment actually responds to, and that language cannot be inferred from internal assumptions.

Connecting these two workstreams to the broader sales expansion is where the strategic consequence becomes concrete. Sample Company cannot convert its sales team investment into predictable revenue until the measurement, messaging, and qualification infrastructure exists to make outbound activity legible and improvable. A quarterly GTM review cadence tied to pipeline and conversion metrics by segment creates the feedback loop needed to distinguish a messaging problem from a targeting problem from a capacity problem. Without it, the company will be unable to determine why pipeline is stalling, and the planned marketing-to-segmentation alignment will have no reliable signal to align to. Deferring these actions does not preserve optionality; it ensures that Series A capital allocated to sales growth produces inconsistent data rather than closed revenue.

Quick Win

Quick win (achievable in 14 days): Draft a one-page ICP document for each of your two primary segments, government-sponsored plans and commercial plans, using the member-size ranges you already know and structured input from two or three existing customers in each segment. This gives every current and incoming sales team member a shared, documented definition of who to target, which is the minimum condition for campaign alignment and consistent outbound execution.

Remaining Seven Categories Removed From Sample Report

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Additional Considerations

What's Most Important Now

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What Can Wait Until Next Stage

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Common Pitfalls to Avoid

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Benchmarks for Measuring Progress

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When to Reassess

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Appendix

Company Information

Company Name	Sample Company
Contact Role	C-Level Executive (CEO, CRO, CMO, COO)
Business Type	B2B Software/SaaS (Software products sold to businesses)
Company Offering Description	Sample Company produces provider network management software for small-medium sized health plans. Plan sizes generally range from 2,500 - 250,000 members for gov't sponsored plans, and 25,000 - 1.5M members for commercial plans.
Annual Revenue	\$2M - \$10M
Team Size Total	26-100
Team Size GTM	2-5
Customer Count	11-50
Primary Sales Motion	Outbound Sales (Proactive outreach, SDRs/BDRs, cold calling, ABM)
Company Age	3-5 years
Funding Stage	Series A
Growth Challenge	Converting leads to paying customers
AI GTM Stance	Experimenting — individuals or teams trying AI tools on their own
Inferred Stage	Growth
Stage Confidence	high
Stage Inference Source	Customer_Context_Questions
Assessment Date	4/29/2026
Assessment ID	6993782f-51c9-435d-8015-8539d33e2d1e

Overall Scores

Category	Score
Strategic Clarity & Market Focus	52%
Demand Generation & Channels	44%
Revenue Operations & Analytics	40%
Leadership, Team, & Execution	44%
Financial Health & Growth Economics	40%
Customer Value & Economic Returns	54%
Product & Sales Motion Alignment	56%
Customer Success & Net Revenue Retention	49.1%

Assessment Details - Detailed Responses by Category

Company Context

Q: What is your company name?

Answer: Sample Company

Q: Which role best describes you?

Answer: C-Level Executive (CEO, CRO, CMO, COO)

Q: What type of business best describes your company?

Answer: B2B Software/SaaS (Software products sold to businesses)

Q: Briefly describe what you offer, your target industry, and your target customer.

Answer: Sample Company produces provider network management software for small-medium sized health plans. Plan sizes generally range from 2,500 - 250,000 members for gov't sponsored plans, and 25,000 - 1.5M members for commercial plans.

Q: What is your company's approximate annual revenue?

Answer: \$2M - \$10M

Q: How many total employees does your company have?

Answer: 26-100

Q: How many people are dedicated to go-to-market roles?

Answer: 2-5

Q: How many active paying customers do you have?

Answer: 11-50

Q: How do customers primarily discover and purchase from you?

Answer: Outbound Sales (Proactive outreach, SDRs/BDRs, cold calling, ABM)

Q: How long has your company been in business?

Answer: 3-5 years

Q: What best describes your funding stage?

Answer: Series A

Q: What is your biggest growth challenge right now?

Answer: Converting leads to paying customers

Q: How would you describe your organization's current stance toward using AI in go-to-market activities?

Answer: Experimenting — individuals or teams trying AI tools on their own

Strategic Context & Additional Considerations

Q: Is there any additional context, priorities, or considerations we should take into account when analyzing your responses?

Answer: In the process of expanding our sales team, we need to ensure we have target account alignment with growth, along with supporting the playbook. Need alignment of marketing efforts and campaigns with customer segmentation.

Strategic Clarity & Market Focus

Q: How clearly have you defined your Ideal Customer Profile (ICP)?

Answer: Basic profile based on early adopters

Q: How well validated is your understanding of customer pain points and desired outcomes?

Answer: Informal conversations but no structured process

Q: How consistently do you apply your ICP across marketing, sales, and customer success?

Answer: Inconsistently applied across functions

Rest of section intentionally left blank.

Categories 2 - 8 Removed from Sample

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How BRCG Can Help

Sample Company is preparing to scale outbound sales into two structurally distinct health plan markets without the ICP definitions, pipeline infrastructure, or measurement systems required to convert that investment into predictable revenue; the work ahead requires building the messaging, qualification, and analytics foundation that makes the Series A sales expansion legible and improvable before capital is consumed generating activity that cannot be diagnosed or optimized.

Two questions to consider before reaching out:

How much internal capacity does your team have to drive this plan right now?

Do you need a thinking partner and structured accountability, or active external support to get it done?

Engagement Approaches

Coaching

For leaders driving execution themselves who need structured guidance and accountability.

- Periodic scheduled sessions with pre-work review
- Framework guidance calibrated to your stage and findings
- Advisory access between sessions for decision support
- Quarterly objective review and alignment

Consulting

For organizations that need active external support to drive the work alongside their team.

- Dedicated weekly working hours for active sessions and workshops
- Documentation, process design, and implementation support
- Structured project-based or ongoing retainer engagements
- Direct involvement in initiatives and not just advisory guidance

Fractional CGO/CRO Leadership

For organizations that need embedded part-time leadership capacity.

- Direct integration within your leadership team
- Ownership or co-ownership of the GTM function
- Full revenue leadership duties or targeted growth areas
- Available with custom playbook alignment for PE-backed organizations

Ready to Take Action?

This report identifies your highest-leverage starting points. A 30-minute working session with BRCG will translate those findings into a concrete first 30-day plan with specific actions, sequenced by dependency, based on your actual scores.

- Prioritize which identified gaps to close first given your specific constraints
- Pressure-test the 90-day action plan against your current capacity and pipeline
- Determine whether coaching, consulting, or fractional leadership fits your situation
- Get direct answers on the recommendations that require the most immediate action

Schedule Your Consultation

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Broad Reach Consulting Group

Thank You

The findings in this report reflect your actual situation. The most valuable next step is acting on the quick wins now. Most are achievable within 7-21 days without additional resources.

When you are ready to work through the 90-day plan or pressure-test the priorities against your pipeline, the conversation will be direct and specific to your data.

The BRCG Team