

# Revenue Scan

For the CEO and leadership team | 28 September 2026

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## Executive Revenue Readout

62/100 Developing — Sales are happening, but results are not yet consistent.

|                                                               |                                                                                            |                                                                    |                                                                 |
|---------------------------------------------------------------|--------------------------------------------------------------------------------------------|--------------------------------------------------------------------|-----------------------------------------------------------------|
| Needs Attention<br>0–49<br>Major gaps are holding sales back. | Developing<br>50–69<br>Sales happen; results are inconsistent.<br>X Northstar is here · 62 | Established<br>70–84<br>Core approach works; specific gaps remain. | Strong<br>85–100<br>Repeatable results; assess where to invest. |
|---------------------------------------------------------------|--------------------------------------------------------------------------------------------|--------------------------------------------------------------------|-----------------------------------------------------------------|

Tighten targeting and qualification before adding sales headcount. Focus on employers of 750–2,500 people: the ideal customer profile (ICP), meaning customers most likely to buy, succeed and stay.

### Do we have enough pipeline to hit the target

The \$6.6M pipeline does not guarantee enough sales. Larger accounts win less often and take longer. Improve qualification, then compare qualified deals expected to close in-period with the new-business requirement—not the \$7M ending ARR target.

### Are our current salespeople doing what they should

Two of six account executives (AEs) meet quota, one is near 85% and three are below 60%. Coach qualification and deal progression. Compare sellers working similar opportunities before judging individual ability or adding capacity.

| Start                                                                                                               | Stop                                                                                                                                               | Continue                                                                                                                |
|---------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------|
| Build a named ICP account list. Train and audit qualification. Put proven sellers on the highest-fit opportunities. | Expanding SDR or AE headcount now. Counting a demo as buying intent. Chasing large contracts without considering effort and likelihood of winning. | Selling to the core segment. Developing referrals and inbound demand. Using the founder selectively in strategic deals. |

### The decision for the next board meeting

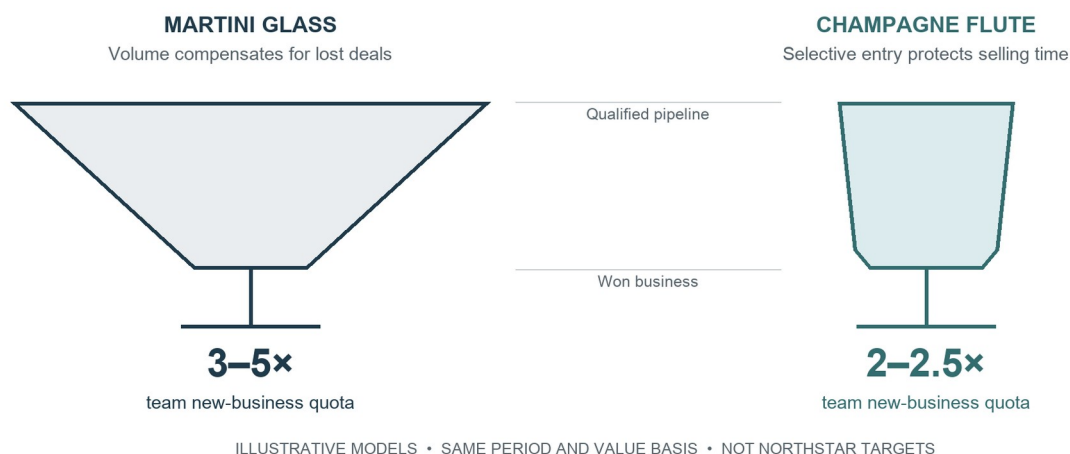
Approve a 30-day targeting and qualification reset. Revisit hiring once core-deal conversion, sales-stage timing and seller workload show a capacity need.

Recommendation confidence: high within this illustrative scenario. The new-business target and a matched external benchmark remain open checks. RS score: a diagnostic, not a market ranking or forecast.

# Finding One

## A busy pipeline is not the same as a productive pipeline

Northstar's current entry standard is too loose: an HR discovery conversation, a relevant problem and agreement to another meeting. The result is a broad set of opportunities competing for AE attention before there is enough evidence of a purchase.



Illustrative qualified-pipeline models, not measured Northstar results. Shapes are conceptual and not drawn to a numeric scale. Marketing reach sits above this funnel.

## Aim for a champagne flute after qualification

A martini-glass funnel consumes selling time on many deals that fall out later. A champagne flute represents more selective qualification and fewer avoidable losses. For Northstar, the fastest practical improvement is to redirect time toward opportunities with a stronger expected return, rather than speculative large-account pursuits.

## What the multiples require

To deliver the same quota, a 3-5x model needs roughly 20-33% of pipeline value to close; a 2-2.5x model needs 40% to 50%. These are arithmetic illustrations using matched periods and values. Northstar's 31% core win rate counts deals, not dollars, and does not establish 40% to 50% in-period value conversion. Earn a lower coverage requirement through better results; do not simply shrink the target multiple.

## What to change

Train the team to establish a business problem, priority, buyer access, buying intent, timing and an agreed next step. Audit actual calls and deal records until the VP Sales has strong evidence that AEs apply those criteria consistently. Expect weak opportunities to leave the pipeline earlier.

Finding confidence: HIGH for the need to improve qualification. The amount of revenue improvement will depend on execution; the diagram is a management principle, not an external benchmark. [1-2]

Sources [1-2]: RS illustrative Northstar intake and diagnostic analysis. No external benchmark asserted.

# Three Priorities

Target precisely, qualify consistently and prove capacity

## 01 Build and work the tightened ICP list

Use LinkedIn Sales Navigator or comparable account-search technology to build a named list of U.S. employers with 750–2,500 employees. Filter by geography, size and relevant characteristics, then identify People/HR leaders and likely economic buyers. Verify account fit manually where tool size bands are broader than the ICP. [5]

Assign accounts and a prospecting cadence. Match proven sellers to the best opportunities, while coaching others to repeat the approach. Why now: the core segment wins more reliably and retains better. Owner: VP Sales with marketing. Effort: moderate. Success: an approved list, named owners, clear exceptions and outreach concentrated on that list.

## 02 Train qualification and audit the work

Train AEs, sales development representatives (SDRs) and marketing counterparts together on what makes a qualified opportunity. Use real calls and role-play. Marketing should listen for core-buyer pain, questions and message clarity, then connect product capabilities to the buyer's business case. Review all 118 opportunities and reclassify those that do not meet the standard.

Continue weekly call and CRM audits, with coaching after each review. A proposed training exit standard is at least 90% agreement with the manager's qualification assessment across three consecutive weekly reviews, with every AE represented and critical omissions corrected. This is a proposed management standard, not an external benchmark. Owner: VP Sales with marketing. Effort: moderate.

## 03 Reallocate effort and measure the hiring case

Compare lead source and customer size together, then run small, controlled prospecting tests. Set the account list, time budget, spend cap, owner and review date in advance; change one main variable where practical. Compare qualified opportunities and progression first, then wins when enough time has passed.

Track stage conversion, stage duration and hands-on opportunity time for the core ICP. Shift effort toward combinations that earn it, and hire only when proven demand exceeds serviceable AE capacity. Owner: VP Sales with marketing and finance. Effort: moderate to high. Success: an evidence-backed allocation and capacity decision.

A small, controlled test limits cost and scope while giving leadership a specific decision to make at an agreed review date.

[5] LinkedIn, How to Use Sales Navigator (accessed 28 September 2026):  
<https://business.linkedin.com/sell/sales-navigator/how-to-use>

# 90 Day Revenue Roadmap

Create evidence for decisions, not another reporting burden

| When       | Start and deliver                                                                                                                      | Evidence of progress                                                                                               |
|------------|----------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------|
| Days 1–30  | Assign the ICP list. Train sales and marketing in qualification. Audit 118 deals and listen to core-buyer calls. Reconcile the target. | Named accounts and owners; corrected pipeline; individual coaching plans; agreed stage definitions.                |
| Days 31–60 | Coach from weekly audits. Run controlled source-by-segment tests. Track stage movement and AE hours.                                   | Qualification accuracy improves; fewer weak deals enter; promising sources and selling bottlenecks become visible. |
| Days 61–90 | Compare results on similar opportunities. Reallocate effort. Bring a conditional hiring case to the board.                             | Clear evidence of what to expand, what to fix and whether good demand exceeds capacity.                            |

## Stop immediately

Pause the proposed two SDR hires and extra AE. Stop broad prospecting outside the agreed ICP without an exception. Stop treating a next meeting or a CRM probability as proof of buying intent. Avoid keeping weak deals open to preserve a reassuring pipeline total.

## Continue deliberately

Keep the core segment supplied with focused prospecting. Continue referrals and inbound development while measuring where they work best. Preserve productive seller time, customer retention work and strategic founder involvement.

## Set a weekly management rhythm

VP Sales reviews qualification audits, next steps, stalled deals and workload. Marketing and sales jointly review source and customer-group results, plus call evidence about pain points, questions and whether the message resonates. Turn that evidence into clearer buyer-specific messages and business cases. The CEO reviews decisions and obstacles, rather than asking only whether pipeline dollars increased.

## Allow sales outcomes time to mature

At a 74-day core sales cycle, early improvements in qualification and deal progression should appear before a full set of wins does. The 171-day large-account cycle extends beyond this roadmap. Judge early tests by better inputs and movement; judge hiring by enough completed sales evidence and sustained workload.

# Gretchen's Take

## If this were my revenue organization

I would put our best people on our best opportunities. Northstar's strongest customer group is employers with 750–2,500 people. Compared with larger accounts, they buy more often and move faster; they also retain better. Build the named account list and make the team's week reflect it.

For Northstar, the fastest practical route to better revenue is to focus time on work with a strong expected return. A large potential contract is not enough. We need a credible buying project, a path to a decision and a sensible return on the hours required to win.

I would train sales and marketing together on qualification. Marketing counterparts should listen to calls with buyers in the tightened ICP: what hurts, what questions recur, what is unclear and which messages resonate. They need to explain what the software does for that buyer, the problems it solves and the business case—including the buyer's expected return on investment. Turn those insights into sharper campaigns, content and sales materials.

The champagne-flute picture captures the aim: qualify carefully and lose less good selling time later. The 2–2.5× model must be earned through conversion and timing; it is not permission to assume fewer pipeline dollars will be enough.

Two AEs meet quota; four do not. I would aim for at least 80% of fully ramped AEs meeting or exceeding credible quotas—five of six here. That is the management standard I would work toward, not an industry average. Coach specific behaviors and compare similar assignments before deciding who has a skill problem.

Before hiring, I would want to know where core deals fall out, how long each stage takes and how many hours an AE spends on an opportunity. Take that evidence to the board: focus prospecting, improve qualification and messaging, then invest where demand and results justify it.

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## Your next step with RS

Your Scan includes an optional 15-minute Q&A to clarify the findings and priorities. Reply to your delivery email to arrange it.

The \$2,500 RS design engagement builds on your Scan to turn an agreed priority into a company-specific solution. Depending on your needs, that could include a sharper customer profile and buyer messaging, qualification criteria and sales stages, or a teachable sales playbook. We agree the specific deliverables and scope before you commit. Implementation and ongoing advisory are scoped separately.

Apply your \$100 Scan credit within 30 days of the date your report is sent, bringing the \$2,500 fee to \$2,400. Reply to your delivery email to explore the fit; there is no obligation to continue.