GO-TO-MARKET PLAN TEMPLATE

The B2B SaaS Go-to-Market Plan Template

Five bets. One page each. A plan that can be wrong.

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COMPANY

PLAN FOR

WRITTEN BY

BEFORE YOU START

How to use this template

1. Block two hours.
2. Pull up your won and lost deals from the last twelve months and your churn list before you start.
3. Fill in the evidence before the target on every page. The target is easy to invent; the evidence is not.
4. A page you cannot fill is the bet you are making blind, and it goes to the top of the list for January.

> Review every bet on its check date. Hit, miss, or unclear. The fallback is already written, so a miss is not a debate.

Not sure what a finished page looks like? Pages 9 to 14 show every page filled in for one example company.

BET 1

Who buys?

OWNER

One name.

Companies like X have this problem badly enough to pay. Not who you would like to sell to: who has already paid.

EVIDENCE: Your won and lost deals from the last twelve months, sorted by company size, industry and who signed. Compare win rate and deal size for each group.

1 Claim

What you believe. One sentence.

2 Evidence today

Where it comes from and what it says. If blank, this is a guess.

3 Target

The number that has to show up, and the floor below which it counts as a miss.

4 Check date

When you will look. At least two bets should have a Q1 date.

5 If it misses

What you do. Decide now, not in March.

BET 2

Why do they buy now?

OWNER

One name.

Something inside the customer turns a problem they live with into one they pay to fix this quarter.

EVIDENCE: Ask your last ten customers: “What changed in the month before you signed?” Write the answers down word for word.

1 Claim

What you believe. One sentence.

2 Evidence today

Where it comes from and what it says. If blank, this is a guess.

3 Target

The number that has to show up, and the floor below which it counts as a miss.

4 Check date

When you will look. At least two bets should have a Q1 date.

5 If it misses

What you do. Decide now, not in March.

BET 3

How do they find you?

OWNER

One name.

One or two channels will produce qualified pipeline at a cost you can afford.

EVIDENCE: Your CRM source field. If it is not filled in, that is the first fix in January.

1 Claim

What you believe. One sentence.

2 Evidence today

Where it comes from and what it says. If blank, this is a guess.

3 Target

The number that has to show up, and the floor below which it counts as a miss.

4 Check date

When you will look. At least two bets should have a Q1 date.

5 If it misses

What you do. Decide now, not in March.

BET 4

How do you sell?

OWNER

One name.

The motion matches the deal size.

EVIDENCE: Your sales cycle and cost per closed deal today.

1 Claim

What you believe. One sentence.

2 Evidence today

Where it comes from and what it says. If blank, this is a guess.

3 Target

The number that has to show up, and the floor below which it counts as a miss.

4 Check date

When you will look. At least two bets should have a Q1 date.

5 If it misses

What you do. Decide now, not in March.

BET 5

Why do they stay?

OWNER

One name.

Customers reach the value they paid for fast enough that renewing is not a decision.

EVIDENCE: Your churn list: which accounts left, when they went quiet, and what they never did in the product. Then the same three things for the accounts that renewed.

1 Claim

What you believe. One sentence.

2 Evidence today

Where it comes from and what it says. If blank, this is a guess.

3 Target

The number that has to show up, and the floor below which it counts as a miss.

4 Check date

When you will look. At least two bets should have a Q1 date.

5 If it misses

What you do. Decide now, not in March.

SUMMARY

The one number

1 The one number this plan answers to in 2027

2 Who owns it

One name.

3 Quarterly review dates

Four dates, Q1 to Q4.

Q1

Q2

Q3

Q4

EXAMPLE · BET 1

Who buys?

OWNER

Sam

One name.

Companies like X have this problem badly enough to pay. Not who you would like to sell to: who has already paid.

EVIDENCE: Your won and lost deals from the last twelve months, sorted by company size, industry and who signed. Compare win rate and deal size for each group.

FILLED EXAMPLE Illustrative company, names and numbers. Not a benchmark.

1 Claim

What you believe. One sentence.

Fintechs with 50 to 200 employees, where the head of finance signs, have the month-end close problem badly enough to pay.

2 Evidence today

Where it comes from and what it says. If blank, this is a guess.

CRM, all won and lost deals from Nov 2025 to Oct 2026 (34 deals). Fintechs with 50 to 200 employees: 10 deals, 6 won, average $9,000 a year. Everyone else: 24 deals, 5 won, average $5,000 a year. The head of finance signed 5 of the 6 segment wins.

3 Target

The number that has to show up, and the floor below which it counts as a miss.

Win rate in this segment stays at 50% or higher on deals decided in Q1. Floor: under 35% is a miss.

4 Check date

When you will look. At least two bets should have a Q1 date.

31 March 2027 (Q1 review)

5 If it misses

What you do. Decide now, not in March.

Every other page rests on this one. Pause new outbound, re-sort the Q1 deals by who signed instead of company size, and rewrite this bet by 15 April.

EXAMPLE · BET 2

Why do they buy now?

OWNER

Maya

One name.

Something inside the customer turns a problem they live with into one they pay to fix this quarter.

EVIDENCE: Ask your last ten customers: “What changed in the month before you signed?” Write the answers down word for word.

FILLED EXAMPLE Illustrative company, names and numbers. Not a benchmark.

1 Claim

What you believe. One sentence.

Fintechs buy in the quarter after they hire their first full-time head of finance, because month-end close becomes that person’s problem.

2 Evidence today

Where it comes from and what it says. If blank, this is a guess.

Asked our last ten customers “What changed in the month before you signed?” on calls in Oct 2026, answers written word for word in the CRM. Seven: a new head of finance had just joined. Two: an audit was coming. One could not say.

3 Target

The number that has to show up, and the floor below which it counts as a miss.

Accounts that hired a head of finance in the last 90 days book a qualified call at twice the rate of other accounts we contact. Floor: under 1.5 times is a miss.

4 Check date

When you will look. At least two bets should have a Q1 date.

30 June 2027 (Q2 review)

5 If it misses

What you do. Decide now, not in March.

Stop building outbound lists from finance hires. Test the audit trigger in Q3 instead, with the same target.

EXAMPLE · BET 3

How do they find you?

OWNER

Priya

One name.

One or two channels will produce qualified pipeline at a cost you can afford.

EVIDENCE: Your CRM source field. If it is not filled in, that is the first fix in January.

FILLED EXAMPLE Illustrative company, names and numbers. Not a benchmark.

1 Claim

What you believe. One sentence.

Outbound to fintechs with 50 to 200 employees produces eight qualified calls a month. Priya sends 200 cold emails a month.

2 Evidence today

Where it comes from and what it says. If blank, this is a guess.

CRM, deals closed Nov 2025 to Oct 2026 (the last twelve months). Four of our last ten won deals were fintechs with 50 to 200 employees, and three of those four first replied to a cold email. The source field is filled in on every deal, so March can be checked.

3 Target

The number that has to show up, and the floor below which it counts as a miss.

Eight qualified calls a month by the end of March, counted in the CRM as calls booked, not emails sent. Floor: under four calls a month is a miss.

4 Check date

When you will look. At least two bets should have a Q1 date.

31 March 2027 (Q1 review)

5 If it misses

What you do. Decide now, not in March.

Under four: stop outbound into fintech. Priya moves to following up inbound leads instead. Four to seven: one more quarter with a tighter target, then decide at the Q2 review.

EXAMPLE · BET 4

How do you sell?

OWNER

Daniel

One name.

The motion matches the deal size.

EVIDENCE: Your sales cycle and cost per closed deal today.

FILLED EXAMPLE Illustrative company, names and numbers. Not a benchmark.

1 Claim

What you believe. One sentence.

Deals of $6,000 to $15,000 a year close with one salesperson on two calls and a trial, without the founder on the call.

2 Evidence today

Where it comes from and what it says. If blank, this is a guess.

CRM, the 11 deals won in the last twelve months: median sales cycle 41 days and four calls. The founder was on 9 of the 11. Cost per closed deal is about $2,400 in sales time, against an average deal of $7,500 a year.

3 Target

The number that has to show up, and the floor below which it counts as a miss.

Deals won in Q2 close in a median of 30 days and two calls, with the founder on fewer than three of them. Floor: a median over 40 days is a miss.

4 Check date

When you will look. At least two bets should have a Q1 date.

30 June 2027 (Q2 review)

5 If it misses

What you do. Decide now, not in March.

Keep the founder on calls for deals over $10,000. Move deals under $6,000 to a self-serve trial with no call.

EXAMPLE · BET 5

Why do they stay?

OWNER

Lena

One name.

Customers reach the value they paid for fast enough that renewing is not a decision.

EVIDENCE: Your churn list: which accounts left, when they went quiet, and what they never did in the product. Then the same three things for the accounts that renewed.

FILLED EXAMPLE Illustrative company, names and numbers. Not a benchmark.

1 Claim

What you believe. One sentence.

Customers who connect their bank feed in the first 14 days reach the value they paid for, and renew without a renewal conversation.

2 Evidence today

Where it comes from and what it says. If blank, this is a guess.

Churn list, last twelve months: 9 accounts left. 8 of the 9 never connected the bank feed, went quiet around month three, and cancelled at month four. Accounts that renewed: 31 of 33 connected it in the first two weeks.

3 Target

The number that has to show up, and the floor below which it counts as a miss.

80% of customers who sign from January connect the bank feed within 14 days. Floor: under 60% is a miss.

4 Check date

When you will look. At least two bets should have a Q1 date.

31 March 2027 (Q1 review)

5 If it misses

What you do. Decide now, not in March.

Lena sets up the bank feed with every new customer on a call in week one. Sales stops signing accounts that cannot connect a bank feed.

EXAMPLE · SUMMARY

The one number

FILLED EXAMPLE Illustrative company, names and numbers. Not a benchmark.

1 The one number this plan answers to in 2027

$1.4M ARR by 31 December 2027, up from $1.1M today.

2 Who owns it

One name.

Sam

3 Quarterly review dates

Four dates, Q1 to Q4.

Q1	31 March 2027	Q2	30 June 2027
Q3	30 September 2027	Q4	15 December 2027

Wrote the bets, but not sure which one breaks first?

The Clueless Company fixes revenue for B2B SaaS companies from $0.5M to $10M+ ARR: leads, sales and retention, inside your own tools.

https://theclueless.company

By **The Clueless Company** · November 2026 · Free to copy and share