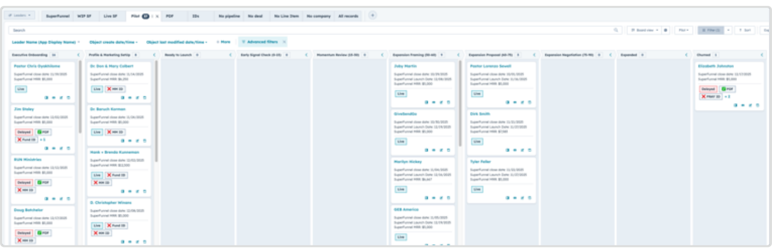
2 Leader Success

🧩 SuperFunnel Pipelines

- **Leader Pipeline:** Ministry SaaS or Pilot
- **Project Pipeline:** Superfunnel Onboarding
- **Deal Pipeline:** Net New (Expansion Deal)

> ℹ️ In HubSpot, Leaders can be placed in two different pipelines: Ministry SaaS and Pilot.
>
> - If the leader has Superfunnel + any other product = Ministry SaaS Pipeline
> - If the leader has Superfunnel only = Pilot Pipeline

Pilot Pipeline



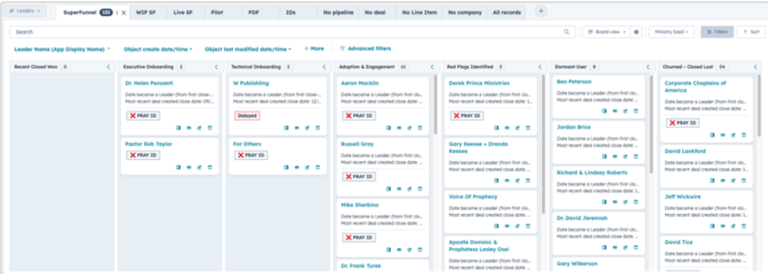
If the leader is on the Pilot pipeline, after the first contract ends:

- If he renews the same contract without additional purchases, he remains on the trial pipeline.
- If he expands the contract with more products, he moves to the ministry SaaS pipeline.
- If he cancels the contract, we record the cancellation date and reason, and set his status to churned.

Additionally, for the pilot pipeline, we have workflows that move the leader to the respective stage based on the time elapsed since launching his superfunnel campaigns.

After 60 days, the AE receives an email prompting them to connect with the leader and begin the expansion process.

Ministry SaaS Pipeline



🗾 SuperFunnel Milestones

- Day 0 Launch
- Day 7-10 Technical Onboarding
- Day 15 Early Signal Check
- Day 30 Momentum Review (CRITICAL)
- Day 60 Expansion Framing (CRITICAL MILESTONE)
- Day 75 Expansion Proposal Review (CRITICAL)
- Day 90 Final Decision

🤝 Net New & Win Back Sales Handoff

> 📅 **Start Date:** New Business Deal Close Date
>
> **End Date:** New Business Deal Close Date

📥**Input:**

When a Net New deal is Closed Won (New Business)

🤖 **Automated Action items:**

1. Sets the **Deal** History Label on the enrolled deal to 'First Closed-Won.'
2. Sets **Deal** Classification on the enrolled deal to New Business.
3. Sends **an external email** to all associated contacts: Welcome to PRAY.COM, new leader from
4. Differentiate the won deal and branch between Syperfunnel, PRAY Radio & TV, or others.
5. Creates a **Leader** record
    - Leader Name (App Display Name): Copy from the deal property Leader Name
    - Leader pipeline: Ministry SaaS
    - Leader pipeline stage: Recent Closed Won (Ministry SaaS)
    - Closed Won Reason: Copy from the deal property Closed Won Reason (dropdown)
    - Short Term Goal: Copy from the deal property Short Term Goal
    - Long Term Goal: Copy from the deal property Long Term Goal
    - Associate the leader with: The deal enrolled and label it as First Closed-Won, Associated contacts, All associated companies, Associated leads, Associated quotes, Associated calls, Associated meetings, Associated emails, and Associated **LINE ITEMS**

*If it's an **expansion** deal, the leader will have his information edited instead of created.*

7. Creates an Onboarding **Project** record
    - Project Name: *"Leader Name"* - *"Product Name"* - Onboarding

- **Pipeline:** SuperFunnel Onboarding & Launch
- **Pipeline Stage:** Pre-Onboarding Preparation (SuperFunnel Onboarding & Launch)
- **Priority:** High
- **Type:** Service
- **Status:** On track
- **Start date:** Copy from the deal property Close Date
- **Target Launch Date:** 21 days from the deal close date
- **Target due date:** 28 days from the deal close date
- Associate the project with: the deal enrolled, Associated contacts, all associated companies, Associated meetings, Associated emails, and Associated Leaders.

8. Sends a **Slack** notification to Nate, Aaron, Andi, Nay, and Jason, to the Ministry Channel, and the deal owner
9. Sends an **internal email to** Andrea Laurent, Nay Luchetti, Aaron Magnuson, Jason Rosoff, Marco Santiago, Nate Roemer, and the Deal owner

📤 **Output:**

New or Updated Leader and Onboarding Project created.

📚 **Resources:**

- Automation: 01) Sales handoff - new client
- Automation: 01.1) Sales handoff - Renewal & Expansion

🧼 Sales handoff SOAP

The Deal record has the **properties:**

- [ ] Deal Name
- [ ] Create Date
- [ ] Deal Owner
- [ ] Deal Type: *New Business or Win-back*
- [ ] Pipeline: *New Business*
- [ ] Deal Stage: *Closed-Won*
- [ ] Leader Name
- [ ] Leader webisite
- [ ] Leader Type
- [ ] Closed Won Reason (dropdown)
- [ ] First Value Goal (Manual) - Optional
- [ ] Long Term Goal (Manual) - Optional

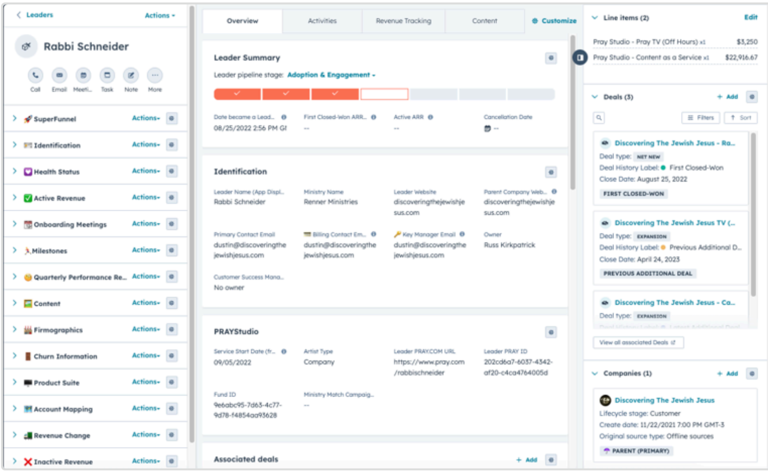
The following **Mandatory Associations** are active:

- [ ] A company labeled as a parent that has Segment, Domain, and Type populated. *(Reminder: Associate all companies related to the negotiation. If the deal involves other companies, it needs to be associated and labeled as a Child or Agency.)*
- [ ] Contact that has email and job title populated. - The contacts that must receive the communications must be related to the deal.
- [ ] A Product that includes Product Category, Term, and Billing Frequency, Service Start Date, and End Date per line item
- [ ] A Quote that includes a signature, that provides for Product SKU (Line Item) with Quantity, Term, Billing Start Date, Service Start Date, and Service End Date
- [ ] *If it's an **expansion** deal, all the above, the leader must be related to the deal*

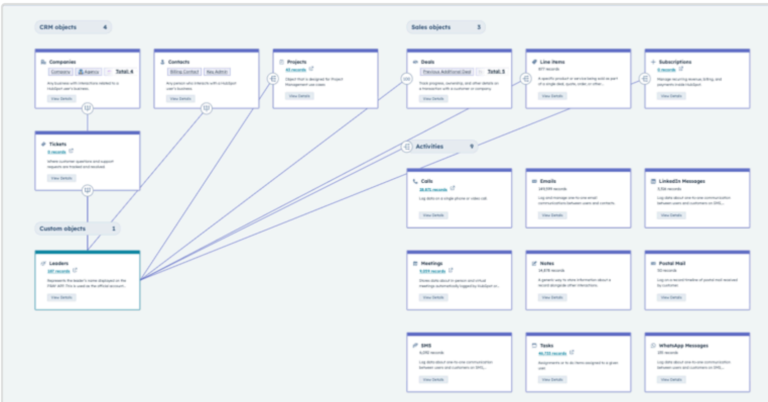
📚 **Resources:**

- Association: Deal ∞ Child Company
- Association: Deal ∞ Agency
- Association: Deal ∞ Key Manager Contact
- Association: Deal ∞ Billing Contact
- Association: Deal ∞ Leader
- Association: Deal ∞ Company
- Association: Deal ∞ Leader 2
- Association: Leader ∞ Contacts 2
- Quotes approval flow
- Deal → Company Segment & Leader Type

Leader Tracker



Leader Associations



- **Deals:** When a new leader is created, the original Net New deal is labeled as First Closed-Won and associated with him. After this, the leader must then be manually associated with any expansion or downgrade deals. Additionally, all deals with a Leader Name deal field matching the leader's name will be automatically associated with the leader.
  - Associated deals are responsible for these properties:
    - Date became a Leader
    - Closed Won Reason
    - Sales Owner
    - Cancelation Date
    - First Value Goal (Manual) - Optional
    - Long Term Goal (Manual) - Optional
- **Line Items:** All line items associated to all closed-won deals will be associated to the leader by automation.
  - Associated Line items are responsible for these properties:
    - Product SKU
    - Quantity
    - Billing Frequency
    - Term
    - Billing Start Date
    - Service Start Date
    - Service End Date
    - Line Item Status (active, inactive)
    - Line Item Type (net new, expansion, downgrade or cancelation)

- **Companies:** All companies associated to the first-closed-0won deal will be associated to the leader by automation. Contacts can also be manually added on the leader and receive the labels Parent, Child or Agency.
  - Associated Companies are responsible for these properties:
    - Parent Company Domain
    - Parent Company Segment
    - Parent Company Type
- **Contacts:** All contacts associated to the first-closed-0won deal will be associated to the leader by automation. Contacts can also be manually added on the leader and receive the labels Key-Manager or Billing Contact.
  - Associated Contacts are responsible for these properties:
    - Primary Contact Email
    - Primary Contact Job Title
    - Primary Contact Persona
    - Billing Contact Email
    - Key Manager Email
- **Projects:** When a new product starts is sold, a onboarding project is created and associated with the leader.
  - Associated Projects are responsible for these properties:
    - SuperFunnel close date
    - SuperFunnel target launch date
    - SuperFunnel Onboarding stage
    - Onboarding Status (from project)

Leader Fields

Overview

Leader Summary

- **Leader pipeline:** manual or automated when the leader is created.
- **Leader pipeline stage:** manual or automated based on date properties.
- **Date became a Leader (from first close-won ...):** Automatically sync **-** the close date of the deal labeled "First Closed-Won."
- **First Closed-Won ARR (Sync First Deal):** Automatically sync **-** the ARR of the associated deal that has the "First Closed-Won" label.
- **Active ARR:** Calculation **-** the sum of all active line items' ARR
- **Cancellation Date:** Can be set manually or automatically when an associated cancellation deal is closed-lost

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Identification

- **Leader Name (App Display Name):** the name the leader is
- **Ministry Name:**
- **Leader Website:**
- **Parent Company Website Domain:**
- **Primary Contact Email:**
- **Billing Contact Email:**
- **Key Manager Email:**
- **Owner:**
- **Customer Success Manager (CSM):**

SuperFunnel

- **SuperFunnel close date:**
- **Superfunnel end date:**

- **SuperFunnel MRR:**
- **SuperFunnel target launch date:**
- **SuperFunnel Launch Date:**
- **SuperFunnel Term:**
- **Onboarding Status (from project):**

PRAYStudio

- **Service Start Date (from first closed-won deal):**
- **Artist Type:**
- **Leader PRAY.COM URL:**
- **Leader PRAY ID:**
- **Fund ID:**
- **Ministry Match Campaign ID:**

Revenue Tracking

- **Service Start Date (from first closed-won deal):**
- **Service End Date (from most recent deal):**

Active Revenue

- **Active TCV:**
- **Active ARR:**
- **Active MRR:**

Revenue Change

- **Net New ARR:**
- **Expansion ARR:**
- **Downgrade ARR:**
- **Cancellation ARR:**
- **ARR Change (active ARR – Net N...):**

Inactive Revenue

- **Inactive TCV:** $291,250.04
- **Inactive ARR:** $291,250.04
- **Inactive MRR:** $26,166.67

Churn Information

- **Cancellation Date**
- **Leader Lifespan**
- **Cancellation Reason**
- **Specific Cancellation Reason**
- **Most Recent Created Cancellation Deal Record ID**

Content

- **Leader Audience CSV:**
- **Leader Podcast URL:**

- **Podcast Host Name:**
- **Podcast Themes:**
- **RSS Feed URL:**
- **Giving Page URL:**

Lead Magnets

- **Do you have any lead magnets available?:**
- **Leader Lead Magnet Image (URL):**
- **Leader Lead Magnet (URL):**
- **Leader Lead Magnet PDF:**
- **Leader Lead Magnet Image:**

Images

- **Leader Promotional Image (File):**
- **Leader Promotional Image (URL):**
  Leader Logo:
- **Leader Logo (URL):**

Social URLs

- **Leader Instagram:**
- **Leader LinkedIn:**
- **Leader YouTube:**

Positioning

- **Leader BIO:**
- **Leader Mission:**
- **Leader Value proposition:**
- **Leader tone:**

Quotes and Social Proof

- **Leader quote:**
- **Leader Social Proof:**

✅ Onboarding

🔹 **Internal Kickoff**

📅 **Start Date:** New Business Deal Close Date

End Date: New Business Deal Close Date + 2 days

📥**Input:**

When a Net New deal is Closed Won (New Business)

🤖 **Automated Action items:**

1. **Create task:** Onboarding prep and CSM assignment → *"Leader Name":* Review the signed contract and deal information in HubSpot, assign a leader owner, assign an onboarding project owner, check the leader type, and segment.
2. **Create task:** Internal Kickoff. → *"Leader Name": Pre-Kickoff meeting with Sales Deal Owner*

📤 **Output:**

- Leader Owner filled
- Project Owner filled

📚 **Resources:**

- [Automation: 02) New Leader Onboarding - Recent Close-won + Executive Onboarding]

🔹 **1 — Executive Onboarding**

📅 **Start Date:** New Business Deal Close Date

End Date: New Business Deal Close Date + 7 days

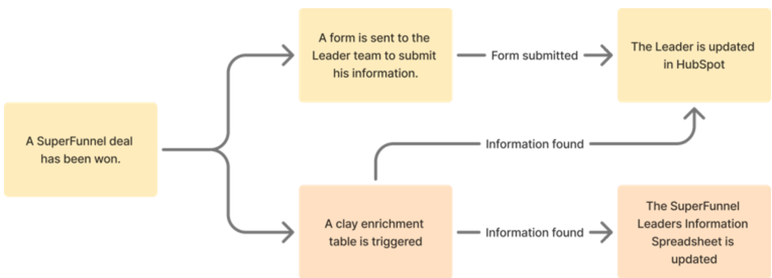
📥**Input:**

When a New Leader Onboarding or a SuperFunnel Onboarding & Launch Project is created, and the Stage is any of the Pre-Onboarding Preparation stages.

🤖 **Automated Action items:**

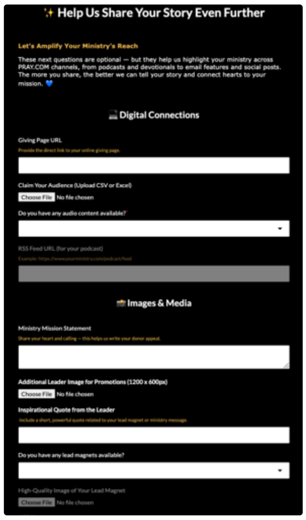
1. **Create task:** Schedule Executive Onboarding Meeting + Build Onboarding Deck → *"Leader Name":* Schedule the kickoff meeting within seven business days of the agreed-upon start date, then create the Executive Onboarding Deck. You can use the "Pre-Call Email Template" for it.
2. **Create task:** Executive Onboarding Meeting → *"Leader Name":* At this stage, the Account Customer Success Manager (CSM) conducts the first alignment meeting with the client to collect and share information and expectations.
    - Gather information on team structure and decision-makers.
    - Identify key stakeholders and their roles.
    - Ensure submission of the New Leader Form.
    - Confirm payment status and billing setup.
    - Review the client's use case, expected outcomes, and product package.
    - Send an email to key contacts sharing the leader lifecycle, frequently asked questions (FAQ), and expectations.
3. **Create task:** Executive Onboarding Follow-up email → *"Leader Name":* Send an email to key contacts sharing the leader lifecycle, frequently asked questions (FAQ), and expectations. You can use the Executive Onboarding Follow-Up or SuperFunnel Executive Onboarding Follow-Up template for it.
4. **Create task:** Ensure the leader's assets are collected → *"Leader Name":* Ensure submission of the New Leader Form to gather the leader's assets to build his profile on PRAY.COM.

⚠️ The **artist assets collection** is crucial for SuperFunnel activation. These assets can be collected (1) from the form submission or (2) through Clay's automated enrichment.



Form submission:

HubSpot Form



HubSpot Form

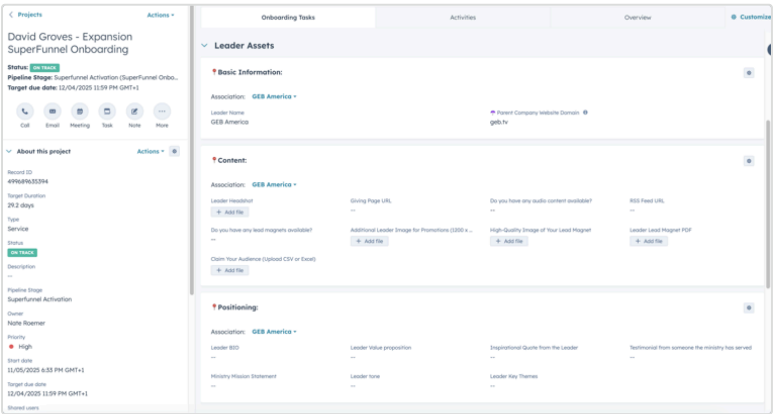
Clay Enrichment:

```
Clay enrichment entity type rules
———If person → use LinkedIn
——————————————if company → use domain
```

Item	Notes	Source
Leader Name	The name of the leader as it should appear on the PRAY APP.	🔑
Leader Website	The official website of the organization associated with the name displayed on the PRAY APP. If the artist type is a Person, this website might be separate from the parent company's site responsible for the purchase.	🔑
Artist Type	Classify these artists as either (1) a person or (2) a company	🤖
Leader Instagram	The official Instagram of the brand associated with the name displayed on the PRAY APP.	🤖
Leader YouTube	The official YouTube of the brand associated with the name displayed on the PRAY APP.	🤖
Leader LinkedIn	The official LinkedIn of the brand associated with the name displayed on the PRAY APP.	🤖
RSS Feed URL	Link to where an RSS feed can be accessed	🤖
Leader Podcast URL	Link to where the audio content can be accessed	🤖
Podcast Host Name	Primary host of the podcast/show name	🤖
Leader Audience CSV	Claim Your Audience (Upload CSV or Excel)	📄

Donations Page URL	Ministry Giving/Donations Page URL	🤖
Leader Lead Magnet	Lead Magnet PDF or URL	🤖
Leader Lead Magnet Image	Lead Magnet Promotional Image File or URL	🤖
Leader Logo	Leader Logo File or URL	🤖
Leader Headshot	Leader Headshot File or URL (3000x3000)	🤖
Leader Promotional Image	Leader Image for promotions File or URL (1220px 600px)	🤖
Leader Bio	Description of Ministry	🤖
Leader Value proposition	A list of ways the ministry serves the world with donations.	🤖
Leader quote	Inspirational quote from the leader related to giving/donating	🤖
Leader Social Proof	Testimonial from someone the ministry has served	🤖
Leader Mission	Ministry Mission Statement	🤖
Leader Tone	The tone of voice used by the leader in his external communications	🤖

✅ Once it is collected, this information will be available (1) on the Leader Assets section on HubSpot Leaders, (2) on the Leader Assets section on the Onboarding Project, and (3) on the [Superfunnel leader assets enriched]



📤 **Output:**

- Executive Onboarding Meeting complete
- Executive Onboarding Follow-up email sent
- Leader Assets properties filled

⚠️ When a task named "**New Leader Form**" or "Leader Assets" is completed, an [automation] updates the pipeline stage to "**PRAYStudio Profile Setup**".

📚 **Resources:**

- [Automation: 02) New Leader Onboarding - Recent Close-won + Executive Onboarding]
- [WIP - [Template] Executive Onboarding Deck]
- [[Active] Leader/Ministry Onboarding Form (complete)]

- Executive Onboarding Call Checklist and Email Templates
- Superfunnel leader assets enriched.

Opportunities:

Revise the checklist in the HubSpot Playbook.

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2 — Profile and Marketing SetUp

Start Date: New Business Deal Close Date

End Date: New Business Deal Close Date + 21 days

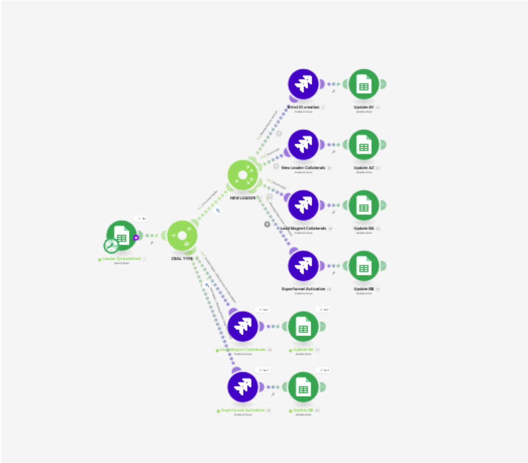
Input:

New Leader Onboarding Project has moved to stage "PRAYStudio Profile Setup."

Automated Action items:

1. **Create task:** Artist ID created → *"Leader Name":* Clay has made a Jira issue requesting Andy Meyer to generate the PRAYStudio artist ID for the Leader. Check if this task has already happened.
2. **Create task:** PRAYStudio Profile Personalization → *"Leader Name":* Upload all assets necessary to complete the Leader Profile. (photos, content, description). Ensure that product access is provisioned.
3. **Create task:** Subscription+ & Ministry Match Setup → *"Leader Name":* Subscription+ Setup (Stripe) and Ministry Match Integration (Direct sync or CSV import)
4. **Create task:** Schedule technical training session + Build Deck → *"Leader Name":* Build the tutorial deck using new assets and schedule a technical call within seven business days following the Executive Onboarding Call.
5. **Create task:** Conduct Technical training session → *"Leader Name":* Conduct the training session with the Leader, Connect Social tool, and select Key Languages for translations.
6. **Create task:** Send Technical Onboarding Follow-up email → *"Leader Name":* Unique Dropbox upload link for Content Delivery - Pray TV (MP4, <4 GB preferred, naming convention) + Google Drive link for Content Delivery - Pray Radio (MP3, naming convention).
7. **Create task:** Lead Magnet Assets → *"Leader Name":* Clay created a Jira issue asking Jason to create a lead magnet if the leader lacks one, and Jose to create promotional assets for it. Review this task upon completion.
8. **Create task:** Fund ID Handoff → *"Leader Name":* Create user attributes and campaign IDs needed for Lead magnet tracking, Triggered emails in marketing automation systems (Braze, Amplitude). Provide ID to Marketing for campaign targeting.
9. **Create task:** Campaign ID Handoff → *"Leader Name":* Handoff campaign ID so Ryan can set the Supperfunnel ads. Ryan and the marketing team need to manage the ad creative and targeting strategy. This should include both leader-specific ads and generic PRAY.COM ads. The creative messaging must align with the client's mission and their call to action.
10. **Create task:** Supperfunnel Email & campaign setup → *"Leader Name":* Once it is collected, the necessary information will be available (1) on the Leader Assets section on HubSpot Leaders, (2) on the Leader Assets section on the Onboarding Project, and (3) on the Superfunnel leader assets enriched. The Marketing Team needs to create an email sequence for a triggered lead magnet. Design the Subs Plus email, including relevant images and copy. Ensure that all campaigns are linked to the correct Fund ID. Provide the necessary parameters to Ragu to facilitate the building of the report.

Jira tickets created via Make:



➡️ **For new leaders:**

Issue Title	Trigger	Description	Owner	Due Date
Create New Artist ID	New Leader is enriched in Clay	Create an artist ID on PRAYStudio for New Leader	Andy Meyer	+ 7 days
New Leader Collaterals	New Leader is enriched in Clay	Build new Leader Collaterals • Profile Image (Vertical) • Leader Profile Image (Square) • Profile Image (Horizontal) Profile Image (Circle) Banner cover image (1080 x 1080) • Fund Image (1080x720) • Default Cover Art PRAY Radio Cover Art PRAY TV Cover Art	Jose	+ 14 days

➡️ **For all Leaders:**

Issue Title	Trigger	Description	Owner	Due Date
Create Leader Lead Magnet	New Leader is enriched in Clay and has no lead magnet	Build a Lead Magnet for this leader. Information on the ticket.	Jason	+ 14 days
Leader Lead Magnet Collaterals	New Leader is enriched in Clay	Build lead magnet promotional collaterals. • Lead magnet promotional hero image: 1082 x 1400	Jose	+ 14 days

		• Lead magnet promotional header image: 1920 x 1080 and 1280 x 720 • Lead magnet mockup image: 2400 x 1600		
Superfunnel Ad and report coordination	New Leader is enriched in Clay and has the Artist ID and Fund ID	Ad and reporting coordination when the studio profile is ready	Ryan	+ 16 days
Superfunnel Activation	New Leader is enriched in Clay and has the Artist ID and MM Campaign ID	Once the PRAYStudio setup is complete, the Product team activates the client's Superfunnel instance. • Leader Name • Artist ID • MM Campaign ID • Specific targeting (if required) • Contract Amount	Sean	+ 18 days

- @Nate Roemer and @Aaron Magnuson, to make this work, update the **Artist ID, Fund ID, and MM ID** in HubSpot.

📚 **Resources:**

- Automation: 03) New Leader Onboarding - Technical Onboarding
- Technical Onboarding Call Checklist and email templates
- Link where the issues are created
- SuperFunnel Activation Tickets (Jira)

📤 **Output:**

- The leader profile on PRAYStudio is personalized
- Artist ID published
- Fund ID published

🔷 3 - Ready To Launch

📥**Input:**

New Leader Onboarding Project has moved to the "PRAYStudio Profile Setup" stage, and the leader's product suite now includes SuperFunnel. The Project advanced to the “Superfunnel Activation” stage after the first closed-won deal included a Superfunnel line item.

🤖 **Automated Action items:**

- **Create task:** Supperfunnel Launch Execution → *“Leader Name”:* Once all systems and assets are ready, Marketing launches ad campaigns. The product ensures funnel tracking is active and attribution is accurate. Sales and success teams monitor progress closely via Slack and Jira.

Jira tickets created via Clay:

Issue Title	Trigger	Description	Owner	Due Date

Superfunnel Activation	New Leader is enriched in Clay and has the Artist ID and MM Campaign ID	Once the PRAYStudio setup is complete, the Product team activates the client's Superfunnel instance. • Leader Name • Artist ID • MM Campaign ID • Specific targeting (if required) • Contract Amount	Sean	+ 18 days

⚠️ When a task named "**Launch Execution**" is completed, an automation updates the pipeline stage to "**Launch Execution & Billing Start**". Also, it copies the task completion date to the associated leader's "**Superfunnel Launch Date."**

📤 **Output:**

- Training session with the Leader is complete
- Technical Onboarding Follow-up email sent
- Supperfunel Ads are live
- The billing process has begun

Resources:

- Automation: 03.1) Expansion SuperFunnel Onboarding
- Technical Onboarding Call Checklist and email templates
- Let's Build Your SuperFunnel external email sent to all associated contacts (for expansion)
- [Active] Superfunnel Onboarding Form

✅ Retention

🔹 5 — Early Signal

📅 **Start Date:** Superfunnel Launch Date

End Date: Superfunnel Launch Date + 15 days

📥**Input:**

"Superfunnel Launch Date".

🤖 **Automated Action items:**

- **Create task:** Post-Launch Follow-Up → *"Leader Name":*
  a. Monitor performance daily during the first week.
  b. Address any issues immediately in the dedicated Slack channel.
  c. Provide regular reports to the client based on the agreed-upon metrics.
  d. After lunch, monitor for one more week, then move the onboarding project to Ready for retention.

Resources:

- Automation: 03.1) Expansion SuperFunnel Onboarding
- Technical Onboarding Call Checklist and email templates
- Let's Build Your SuperFunnel external email sent to all associated contacts (for expansion)
- [Active] Superfunnel Onboarding Form

- 6 — Momentum Review

✅ Expansion

📚 **Resources:**

- [Trial Leader Sequence (7/30/60/90)]: Sends Slack notifications to notify owners and specific users at 7, 30, 60, and 90 days after the SuperFunnel Launch Date property changes.

- 7 — Expansion Framing

- 8 — Expansion Proposal
- 9 — Expanded or Churned

STAKEHOLDER OWNERSHIP (UPDATED)

📌 **AE (Account Executive) = QUARTERBACK**

- Owns client narrative & momentum
- Drives meeting cadence & expansion framing
- Ensures next meeting is always booked
- Primary expansion owner through handoff

📌 **Product Team = CAMPAIGN EXECUTION OWNER**

- **OWNS:** Campaign start/stop decisions (no approval needed)
- **OWNS:** Data reporting at all milestones (Days 15, 30, 60, 75, 90)
- **DELIVERS:** One-pagers, performance snapshots, scaling recommendations
- **EXECUTES:** Campaign optimization (budget allocation, pause/scale decisions)
- **REQUIREMENT:** Client infrastructure complete before execution begins

📌 **Success Team = ONBOARDING & SETUP**

- Executes client onboarding in PRAYStudio
- Validates Subs+/donation infrastructure configured
- Client relationship maintenance
- Coordinates with Product for technical validation

📌 **Marketing Team = LEAD MAGNET SETUP**

- Completes lead magnet setup (in tandem with Success)
- Provides creative assets to the Product team
- Supports campaign messaging alignment

PRE-LAUNCH REQUIREMENTS (BEFORE PRODUCT EXECUTES)

Product team CANNOT start campaign execution until ALL setup is complete:

✅ **Success Team:** Client onboarded in PRAYStudio

✅ **Success Team:** Subs+/donation infrastructure configured

✅ **Marketing Team:** Lead magnet setup complete

✅ **Marketing Team:** Creative assets delivered

✅ **AE:** Client contract signed & first meeting scheduled

✅ **Once complete, → Product has full autonomy to execute**

MEETING SEQUENCE & REQUIRED ACTIONS

🎖️ DAY 0: LAUNCH

- **WHO:** AE leads
- **ACTION:** Send launch confirmation
- **PRODUCT ROLE:** Receives green light to begin execution (no approval needed)
- **BOOK:** Tech Onboarding + 30-Day Review

🎖️ DAY 7-10: TECHNICAL ONBOARDING

- **WHO:** Success + Product
- **DELIVERABLE:** Confirm tracking live
- **PRODUCT ROLE:** Validates campaign infrastructure, begins execution
- **BOOK:** 15-Day Early Signal Check

🎖️ DAY 15: EARLY SIGNAL CHECK

- **WHO:** Success (AE aware)
- **DELIVERABLE:** 1-2 Early Signals
- **PRODUCT ROLE: Delivers first data snapshot** (impressions, emails, early subscribers)
- **OUTPUT:** Friction addressed, campaign adjustments made by Product if needed
- **PRODUCT DATA DELIVERABLE:**
  - Impressions to date
  - Emails collected
  - Subscribers acquired (if any)
  - Cost per email (CPE)
  - Early performance vs. benchmarks

🎖️ DAY 30: MOMENTUM REVIEW (CRITICAL)

- **WHO:** AE + Success
- **DELIVERABLE:** One-page Momentum Snapshot
- **PRODUCT ROLE: Delivers a comprehensive 30-day performance report**
- **BOOK:** 60-Day Review (NON-NEGOTIABLE)
- **PRODUCT DATA DELIVERABLE:**
  - Total investment to date
  - Impressions delivered
  - Emails collected (CPE)
  - Subscribers acquired (CPS)
  - Revenue generated (actual)
  - Estimated lifetime revenue (ELTR)
  - Benchmark comparison (similar campaigns)
- **Scaling recommendation:** Continue, Pause, or Scale Up

🎖️ DAY 60: EXPANSION FRAMING (CRITICAL MILESTONE)

- **WHO:** AE leads
- **DELIVERABLE:**
  - Expansion direction
  - Verbal alignment on tier/scope
  - Budget range confirmed
- **PRODUCT ROLE: Delivers 60-day performance report + scaling scenarios**

- **BOOK:** Day 75 Proposal (MANDATORY)
- **PRODUCT DATA DELIVERABLE:**
  - Full 60-day performance metrics
  - ROI trajectory (actual vs. estimated)
  - Subscriber retention data
  - Revenue per subscriber analysis
- **3 Scaling Scenarios:** Conservative ($15K investment)
  - Moderate ($30K investment)
  - Aggressive ($50K+ investment)
  - Projected outcomes for each tier

🎖️ DAY 75: PROPOSAL REVIEW (CRITICAL)

- **WHO:** AE leads
- **DELIVERABLE:**
  - Full proposal reviewed
  - Pricing tied to pilot data
  - Objections addressed
- **PRODUCT ROLE: Delivers final data package supporting proposal**
- **BOOK:** Day 90 Decision (MANDATORY)
- **PRODUCT DATA DELIVERABLE:**
  - Complete 75-day performance summary
  - Campaign efficiency trends
  - Competitive benchmark positioning
  - Risk/opportunity analysis
- **Data-backed pricing justification** for proposed expansion tier

🎖️ DAY 90: FINAL DECISION

- **WHO:** AE closes
- **OUTCOMES:**

✓ Expansion signed, OR
✓ Clear decline, OR
✓ Executive escalation

- **PRODUCT ROLE: Delivers final 90-day report regardless of outcome**
- **PRODUCT DATA DELIVERABLE:**
  - Complete pilot performance summary
  - Lessons learned & optimization opportunities
  - Platform insights for future campaigns
- **If expansion signed:** Immediate execution plan with target metrics
- **If declined:** Post-mortem analysis for internal learning

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PRODUCT TEAM EXECUTION AUTONOMY

The product team has FULL autonomy to:

✅ Start campaigns once setup is complete (no approval needed)

✅ Pause underperforming campaigns

✅ Scale winning campaigns within the approved budget

✅ Reallocate budget across channels/tactics.

✅ Adjust targeting, creative, or messaging.

✅ Make optimization decisions in real-time.

Product team MUST:

- Deliver data reports at Days 15, 30, 60, 75, 90 (non-negotiable)
- Notify AE + Success of significant campaign changes (pause, major scale)
- Provide scaling recommendations backed by data
- Hit or exceed benchmark performance metrics

Product team does NOT:

❌ Need approval to start/stop campaigns.

❌ Wait for AE/Success permission to optimize

❌ Require client approval for tactical changes.

DATA REPORTING CADENCE (PRODUCT RESPONSIBILITY)

MILESTONE REPORTS (Required):

- Day 15: Early Signal Snapshot
- Day 30: Momentum Review Report
- Day 60: Scaling Scenarios Package
- Day 75: Proposal Support Data
- Day 90: Final Performance Summary

AD-HOC REPORTING (As needed):

- Client requests via AE
- Executive leadership updates
- Campaign troubleshooting data

FUTURE STATE (Pending):

- Daily reporting in PRAYStudio (self-service)
- Real-time dashboard access for AE/Success
- Automated alerts for milestone achievement/underperformance

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KEY OPERATING RULES (NON-NEGOTIABLE)

1. **AE = Quarterback** (owns end-to-end client relationship)
2. **Product = Campaign Operator** (owns execution & data)
3. **Every meeting ends with the next meeting booked**
4. **Data visibility shared** (not siloed) - Product delivers, all stakeholders have access
5. **Expansion direction aligned by Day 60**
6. **Proposal reviewed before Day 75**
7. **Decision finalized before Day 90**
8. **Product delivers data at EVERY milestone** (no exceptions)

SHARED VISIBILITY DASHBOARD

INTERNAL ACCESS: AE (primary owner), Success, Product, Leadership
TRACKS:

- Launch status
- Meeting cadence completion
- 15/30/60/75/90-day milestone status

- Campaign performance metrics (Product-delivered)
- Momentum indicators
- Expansion readiness: Green/Yellow/Red

ESCALATION PROTOCOL

When Product identifies campaign issues:

1. Product makes immediate tactical adjustments (within autonomy)
2. Product notifies AE + Success of significant changes
3. AE determines if client communication is needed
4. Success coordinates any technical client support

When expansion at risk (Day 60+):

1. Product provides data supporting concerns
2. AE owns client conversation & objection handling
3. Leadership escalation if needed (via AE)

Useful links

- All **Leaders** (free included): HUBSPOT
- **TRIAL** leaders: HUBSPOT
- **LIVE** leaders: HUBSPOT
- **WIP** leaders: HUBSPOT
- **Deals won:** HUBSPOT
- Onboarding **projects**: HUBSPOT
- **OPEN** onboarding projects: HUBSPOT
- **PDFs Upload:** HUBSPOT
- **Leader ID Update:** HUBSPOT
- **Product activation tickets**: JIRA
- T**racking report:** HUBSPOT
- Leaders **Enrichment Sheet:** SPREADSHEET
- **Service information:** SPREADSHEET
- **On deck:** SPREADSHEET
- Process **playbook?** CONFLUENCE