A Go To Market Playbook for early-stage B2B startups

This is a Tactical Guide to Go-To Market strategy so you can hit the ground running with sales and marketing.

Part 1: Context

- Understanding Go To Market (GTM) and what that means for startups
- The connection between your ideal customer profile (ICP) and GTM

Part 2: Tactics

- The 7 pillars of a strong GTM strategy
- How to map GTM elements to your ICP

Part 3: Next Steps

- Linking GTM to marketing and sales
- Additional tips and how-to guides

The Basics of Go-to-Market

Go-to-Market (GTM) strategy is the plan for how to bring your product to customers—how you find and reach the right customers and then how you talk about it, sell it, market it, and price it in a way that gives you a competitive advantage.

GTM Inputs:

1. ICP identification
2. Founder story
3. Value proposition
4. Pillar story
5. Positioning
6. Pricing
7. Customer Champions

Where GTM plugs into early stage sales and growth

Pillar 1: ICP Identification

Ignore your TAM. Focus on your ICP.

Narrowing to an Ideal Customer Profile works because:

- You can test and iterate more quickly.
- You only need to build one acquisition channel to get multiple customers.
- It's easy to grow from and build a sustainable, repeatable sales process.

The Total Addressable Market (TAM) is a big, sexy number.

But it's a false idol: 90% of your TAM won't ever become your customer (ever).

Your Ideal Customer Profile (ICP) is a prospect that:

- Experiences the pain your solution solves right now.
- Has a relatively simple decision making structure OR is a known early adopter of technology similar to yours.
- Has (or can allocate) budget to solve their problem.

Focus on your ICP to get a foothold and give you the resources / traction necessary to take on more of your TAM later.

ICP Gets You To Industry Standard

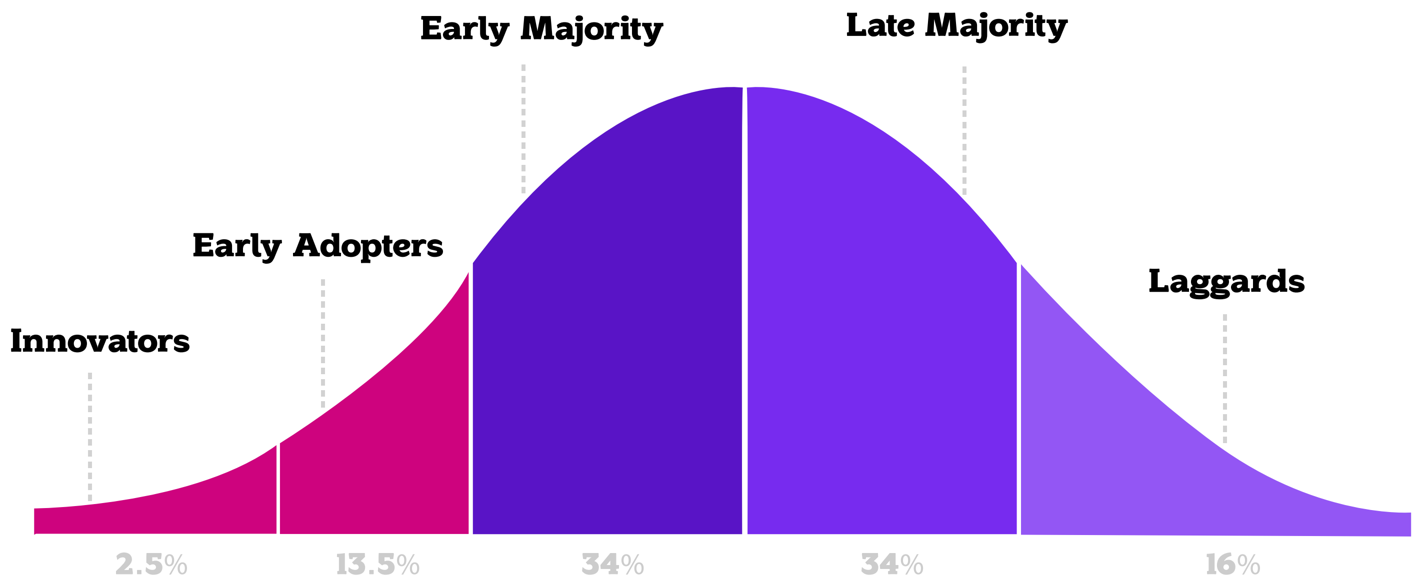
At early stages, no one outside of Innovators and Early Adopters will buy your product.

Innovators want to be part of a community at the cutting edge. They also want to feel they are helping to build the future of the industry.

Innovators are great for candid feedback and testing new ideas.

Early Adopters want to be the first users of a polished solution. They want to feel connected to innovation and be seen as innovative.

Early Adopters are great for testing scalable sales channels or messaging while also maturing your product with advanced features.



Know Your ICP Segment Size

The key to a successful GTM strategy is preparing for the right size of segment. Depending on the type of customer you're going after—SMB, Mid-Market, or Enterprise—your initial segment size will look different.

	SMB	Mid-Market	Enterprise
Initial Segment Size	1,000 - 2,500+	150 - 250	50 - 100
# of Decision Makers	1 - 4	5 - 15	15+
Rough Annual Deal Size	$5,000 - $59,999	$60,000 - $99,000	$100,000+

Use Forum's Market Sizing Template to estimate your market opportunity

Refine Your ICP: Characteristics to Look for

Geography

Revenue

# of Employees

Industry

Platform

Level / Seniority

Note: This is not exhaustive.

We've included a list in the appendix of other ICP characteristics you can refine by. The key is to look for what makes sense in your business - all of these could work for you and none are prescriptive.

Example: Identifying Your ICP

Wave is an invoicing and payments SaaS for freelancers

ICP Identification Framework

Key attributes: White collar service freelancers

Top region: North America

Situation: Freelancers can't easily make invoices or collect payments digitally.

Pain: They look unprofessional and this process wastes time, reducing their revenue potential.

Impact: Wave helps freelancers make professional invoices and accept payments in seconds - for free.

ICP Identification

Experiences the pain your solution solves now: White collar service freelancers created invoices manually.

Simple decision structure OR known early adopter of tech: Freelancers have an incredibly simple decision making structure (themselves).

Has (or can allocate) budget to solve their problem: Freelancers don't have budget but are willing to pay a small fee for payment processing instead of an upfront cost for the platform.

Wave made their initial platform completely free and only charged a small fee for payment processing. That reduced barriers to sign up and created community feel - Wave only won when freelancers won.

Result: After ~10 years of focusing on freelancers, over 2 million now use Wave for invoicing.

Outcome: ~$400M (USD) exit to H&R Block in 2019.

Use Forum's ICP Framework Template

Pillar 2: Founder Story

Founder Stories Help You Connect With Your ICP

In early stage startup sales, your story is critical. Stories are how humans connect with one another and find common ground. It also makes you much more memorable. A strong founder story explains why you started the business, making it easier for people to resonate with your product.

The founder story is the progress and moment when the founder identified the problem, realized why other solutions failed, and built the right (your) solution.

Done well, your founder story demonstrates why your solution is the only solution for the problem your ICP is facing. If the founder themselves is not on a sales call, their surrogate needs to be able to share the story with the same conviction.

The narrative arch of a Founder Story:

- The challenge that led to experiencing the problem.
- Your personal experience with the problem.
- The trends that helped you realize the true scope of the problem (that you weren't the only one)
- How you identified the root of the problem.
- Why current solutions didn't solve your problem.
- What you knew the problem really needed.

Use Forum's Value-Based Founder Story Template to build your founder story step by step.

"Use your founder story to frame the problem in the buyer's mind."

- Whitney Sales, General Partner @ Forum Ventures, Creator of The Sales Method

Founder Story Example

Firstbase

We missed our kids walking, laughing and talking for the first time.

We realised the need for Firstbase in our last startup. We decided to be remote for a number of reasons – but most importantly we saw it as a massive quality of life upgrade.

Chris had been working away from home a lot. He missed his daughter walking, laughing and talking for the first time. When we founded our own business we wanted to be there to see them grow up and have more time for the people we cared about most.

At the same time, we knew we'd be far more talented and cost efficient. We would be constrained to hiring the best person we could afford in a 30-mile radius of a physical location; we could attract the best people in the world for every single role.
So we became a remote team.

Then immediately started experiencing significant challenges and obstacles with operating that way. Something we were incredibly passionate about was providing a great remote work experience for our team. We recognised immediately how expensive and time consuming that was. Things wouldn't turn up, people would leave, it all led to a terrible experience for everyone. Without the right tools and equipment it is incredibly difficult to be as safe, comfortable and productive at home as you would be in an office.

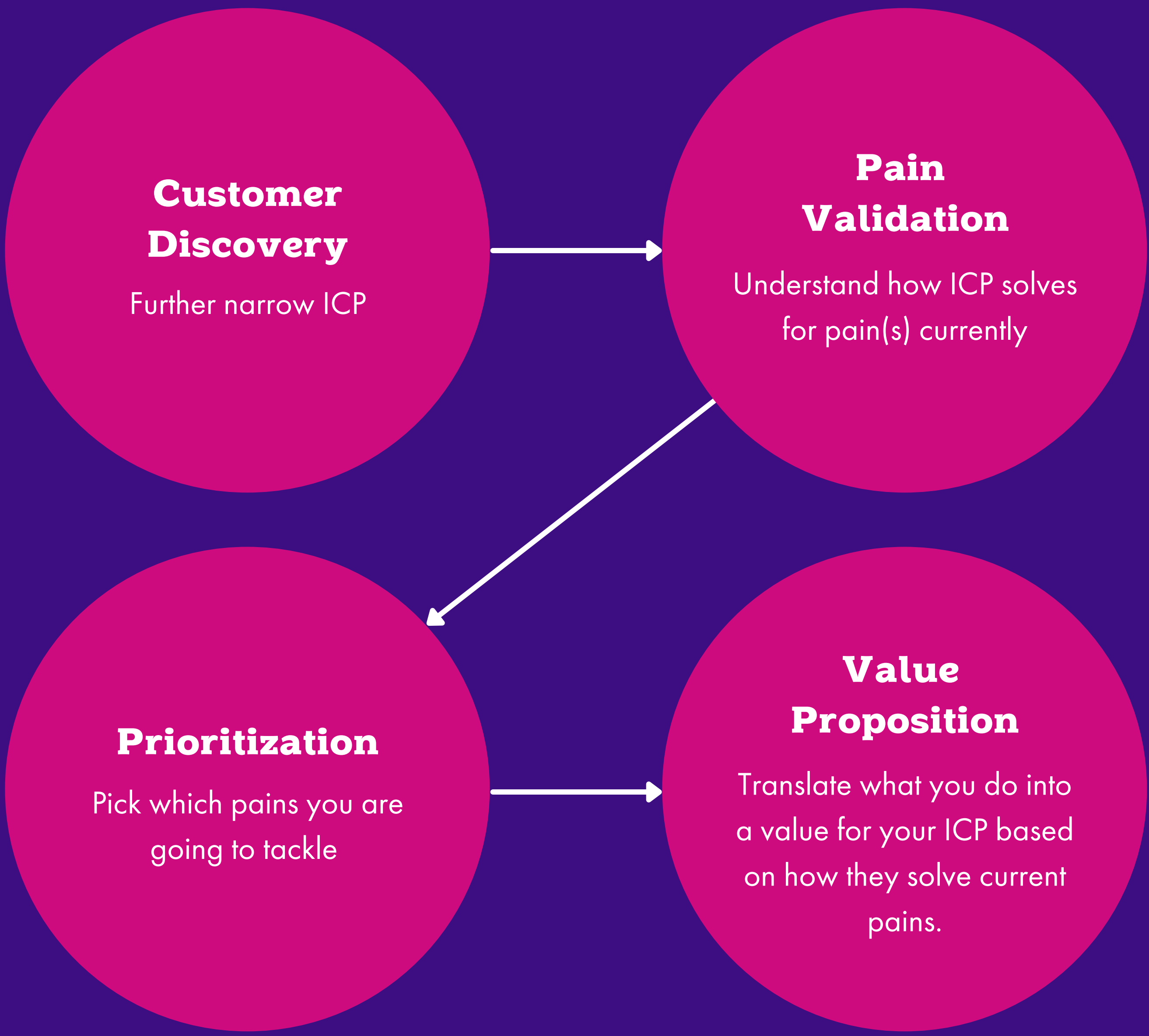
Putting our heads together, we set out to solve this problem for ourselves. Firstbase emerged from our desire to provide our team with the best remote work experience on the planet.

Our prior experience meant this was a problem we were uniquely placed to solve incredibly well. Chris spent 3 years putting the same physical equipment we were giving to our remote workers in the most challenging and remote environments on the planet. Trey managed the deployment, support and training of mission critical cyber security systems and technical infrastructure for the US Airforce in the most challenging environments globally.

From there, we began mentioning 'Firstbase' to friends building remote teams. We heard the same things we already experienced and we knew it was a massive problem for them as well. We launched Firstbase in late September 2019 and began building out the product...

Pillar 3: Value Proposition

Value Propositions Build On Founder Stories To Empower Sales



"If there's not a compelling reason to change, people just won't"

- Nora Khalili, Principal Consultant at NJK Consulting

Customer Calls Help You Uncover Value Props

At this stage, customer calls are for understanding, not sales. Selling too early could damage your credibility.

Pre-Call Prep

Set your agenda:

- Goal for the call
  - Get more info
  - Validate a product idea
  - Get initial sale or use
- List assumptions
  - Buyer profile or use case
  - "Because they work in ecom, they will have advertising needs" → an assumption
- Script your questions
  - Checklist to hold yourself accountable, not necessarily for rapid fire

Running a Call

Discovery call

- Goal: find hypotheses
- Understand a "day in the life" of your customer
- Mistake: going into the call thinking your idea or product is the right solution

Validation call

- Goal: test hypothesis
- Validate what you think your customers want and need
- Given your solution, what needs does the customer have that fit into the solution

42% of startups fail because they haven't established a market need (CB Insights)

Customer Call Type 2: Pain Validation

This step is when you talk to people in your ICP to validate their pains.

Step	What it is	How to do it
Check assumptions	Starting from a clean slate	Go into customer validation calls with no assumptions if at all possible. If not, clarify all assumptions up front so your takeaway insights aren't tainted.
Stay open ended	Getting the most out of answers	Never ask a leading question. Instead, keep things focused on very open-ended questions about how someone felt or acted.
Ask about the process	Understanding the big picture	When asking questions, go "down the rabbit hole," so to speak. Ask about the whole process - what comes before, after, and after that.
Embrace tangents	Learning about your ICP	Tangents can often reveal something deeper, like personal motivations or other trends that stretch across your ICP.

Customer Call Type 1: Problem Discovery

This step is when you brainstorm based on personal experience and research. If you don't have enough information or research to brainstorm, then plan discovery calls with people you think might be in your ICP.

Step	What it is	How to do it
Segment Customers	Identify ICP segments by characteristics	Take your top 10 ICP segments based on the process from Pillar 1 and further refine based on noticeable characteristics.
Identify Pain	Identify ICP pains	For each segment, list all pains they might face.
Prioritize pains	Assign order of priority of ICP pains	For each segment, prioritize pains based on which are likely to cost the most or hinder the most opportunity.
Assign costs to pains	Assign cost to ICP pains	Whether through personal experience or educated guess from research, assign a dollar value (or other tangible cost) to each pain.

After 5-10 Customer Calls: Aggregate Everything

Aggregating Data

Primary goal: Tracking against hypotheses

- Is the pain real for customers?
- Did you ascribe the right value?
- Are other factors at play?
- Are we building the right product / feature?

While all data is ultimately for informing correct ICP identification, you should also have clear hypotheses that funnel into ICP identification around pain, price, and what they've done to solve the problem so far.

Informing Product Development

Key to remember: Wait at least 3-5 calls before making any changes to the product roadmap.

- If a customer call reveals a wildcard you weren't expecting, adjust future call questions to validate before changing product direction.

Example: You were expecting "Y" to happen as a result of X, but then a customer said "A" actually happens.

Not: "When you do X, does "A" happen?"
But this: "What happens after X?"

Note: Keep track of all customers that strongly identify with your mission on top of those in your ICP profile. Mission-aligned customers could form the basis of an informal customer advisory board down the road.

Prioritize Value Propositions After Aggregation

Prioritization is about finding a burning need for customers that will make them happy to spend money to address. You'll typically identify that need in one of these four categories:

Biggest Pain

Which pain is really keeping your ICP up at night

Most Money

Which pain is costing your ICP the most money

Largest Opportunity

Which pain applies to the largest number of companies

Biggest + Easiest

Intersection of the largest problem that is the easiest for you to execute on

Translate Prioritized Value Props Into Marketing Messages

Translate your chosen prioritized pains into a value proposition that is:

Relevant

Clearly explains how you solve a problem.

Quantified

Explicit about specific benefits.

Differentiated

Why your business specifically.

Comparative

Makes clear how you are better than competitors.

Value Proposition Example:

Evernote

"Your notes. Organized. Effortless."

Relevant

Evernote helps people with content organization (including their own thoughts), so it's very relevant.

Quantified

"Effortless" is vague, but you know it when you see it. That's quantifiable enough because it links into a binary outcome (effortless vs not effortless).

Differentiated

Focus on the effort to organize, not the ease of taking notes (or the beauty of the platform) as some competitors did.

Comparative

Their marketing copy ends with: "Nothing falls through the cracks." This is an inherently comparative statement, implying that other note taking methods have things falling through the cracks.

Pillar 4: Positioning

Position Your Product Marketing Messages To Buyer Personas

Positioning is how your customers see you as solving their problems compared to available alternatives and to the market at large.

Symptoms of great positioning:

- Your prospects can pitch your company better than you can.
- Customers seem to “get” you intuitively.
- Customers tell you new and novel ways they get value from your product.

Later stage indicators of great positioning:

- Customers stick around - even when you raise your prices.
- Sales cycles are shorter than your industry’s average.

“Demand generation is entirely dependent on how good positioning and messaging is”

- Roger Figueiredo, VP Marketing at #paid

The Positioning Journey: Inputs

Before creating your positioning documents and messages, make sure you have the right inputs

Villains

What your customer is up against

Alternatives

All other ways to solve the problem

Benefits

How you solve the problem and are better than alternatives.

Path

What your customer needs to do in order to get the benefits you provide.

The Positioning Journey

"Your character has a problem. She meets a guide who gives her a plan and calls her to action. It results in success and helps avoid failure."

Positioning is NOT

"Our product does [feature] for [customer] unlike [negative thing about competitor]."

Details: The Positioning Journey

1 - Problem

- Villains (time, pressure, philosophical issues)
- Alternatives (workarounds, competitors, doing nothing)

2 - Guide

Your value proposition that tackles all alternatives a customer faces and assuages all villains

3 - Plan

How to purchase, how to work with you, and how to overcome their villains and do better than their alternatives

4 - Action

Make sign up easy if a prospect is ready OR make engagement easy (i.e. a newsletter) if they aren't yet ready to buy

5 - Comparative

Your differentiating feature, proof point, credentials, or case study to show you can deliver on your promises and mitigate risks

The Positioning Journey Example:

#paid

Formula

"Your character has a problem. She meets a guide who gives her a plan and calls her to action. It results in success and helps avoid failure."

Example:

"Marketers are interested in influencer marketing but are concerned about shady influencers, long lead times, and limited performance data. #Paid is a creator platform that helps marketers quickly launch campaigns directly with the creator. This means they can develop a whole campaign in under a day with performance analytics to track campaign success or triggers to notice if the campaign isn't delivering and shut it off."

Pillar 5: Pillar Story

Write a Pillar Story to Amplify Founder Story and Value Propositions

A Pillar Story is like a manifesto. It puts your Founder Story and Value Proposition into one long-form blog post that can be shared internally, with prospects, and with anyone who wants to understand why you're building your startup.

The Pillar Story is powerful and flexible:

- Publish it as a standalone post (See Next Steps in this deck).
- Break it up into additional blog content.
- Use it internally to train value proposition and founder story.
- Use it to inform sales scripts and marketing copy.
- Use it to provide a guidepost for product development and to remember competitor pitfalls to avoid.

The inputs of a Pillar Story

- Founder Story, plus;
- Value Propositions, plus;
- Customer language and phrases / key words used (learned from validation calls).

Together, these inputs form the narrative of your Pillar Story:

- Who you are and the problem you faced.
- Trends that led you to problem identification.
- Issues with current solutions.
- Realization of what a solution should be.
- Proof points and value of your solution.

Use the Pillar Story Template to write your story

Pillar 6: Pricing

Develop The Right Pricing For Your ICP

The Goal of Pricing

1. 1% increase in average revenue per unit (ARPU), also known as average contract value (ACV)
2. Net decrease in customer churn

Pricing strategy is ongoing in early-stage SaaS, meaning once you hit the 1% increase in ARPU and net churn decrease, it is time to look again at your prices and packages.

Elements of Pricing Strategy

SaaS pricing cannot follow traditional models like cost-plus, try-and-see, or competitor-based pricing. Instead, it needs the following inputs

Sentiment

How prospects feel about your product relative to their pain

Willingness to Purchase (WTP)

Budget allocated to solving the problem you sell a solution for

Personas

WTP-based demographics and psychographics

Value Levers

The factors that determine when the price goes up or down

“Pricing is the exchange rate on the value you’re creating in the world”

How to Reach Pricing Goals: Differentiable Features

The only way to run successful pricing tests is to know your differentiable features.

This is not about what is unique about your product compared to competitors, but what customers are more willing to pay for (WTP) when it comes to solving their problems or giving them desired benefits.

- You can charge more for a select group
- You can charge more for everyone
- Customers don't care
- This is expected of your solution

Pricing Research

Pricing should first focus on differentiable feature identification then range of prices

Differentiable Features

Use the "most-least" valuable comparison.

Instead of asking people to stack rank a list of features or benefits, give them a comparison and ask them to choose between the two which is most versus least valuable.

Example: Coffee
Of these two features, which is the most valuable to you and which is the least valuable to you?

1. Taste
2. Location or bean origin

Range of prices

Pick a range of prices to test, and then ask the following questions:

- At what [monthly] price point does [product] become too expensive that you'd never consider purchasing it?
- At what [monthly] price point does [product] start to become expensive, but you'd still consider purchasing it?
- At what [monthly] price point is [product] a really good deal?
- At what [monthly] price point is [product] too cheap that you question the quality of it?

The best research source is your own customers, if possible. If not, consider professional research platforms like Qualtrics, Survey Monkey, Survey Gizmo, and Lucid Technologies.

Source: Price Intelligently by Profitwell

Pricing Strategy Steps

01

Develop buyer personas

- List demographics and psychographics.
- Hypothesize pain levels, problem magnitude, and proposed willingness to pay.
- Suggest a proposed price range and value levers based on pain and WTP

02

Conduct sentiment research

- Analyze for differentiable features.
- Survey for willingness to pay along your proposed price range.

03

Consider positioning

- Look at your positioning and what it might say about your price (high end, etc.).
- Consider potential distribution partners and their positioning that might impact your pricing strategy.

04

Set prices and test

- Set a number of packages and price levers / value metrics (best practice is 3 to start).
- Set prices based on the highest average price of "Really good deal" from surveys.
- Run tests to see if conversion increases and watch for churn on those customers.

Pillar 7: Cultivating Customer Champions

Cultivate Customer Champions With A Solution Business Case

Key things to remember about solution business cases:

1. It must be simple enough to be explained to a 10 year old.
2. It must be grounded in reality and specific to customer pains.

"It's better to be realistic and passionate than left field and too broad".

Your business case must address how prospects get "TIM" from your solution:

- Time your solution saves the prospect.
- Image your solution props up or defends.
- Money your solution generates.

Once you have a TIM-based business case, you can more easily connect your pricing into the conversation as an explanation of value, not an expense to be justified.

"Selling is about making your customer's life easier. Show them how you're there to help."

- Jeff Becker, Forum Ventures Managing Director

Telling a TIM Story

Have this information ready:

The problem

- Know the problem at a 50,000 foot strategic view.
- Understand the problem at the prospect-specific level (for their title / role and for their decision makers and champions).
- A case study showcasing a similar company with a similar problem (who ultimately used your solution).

The solution

- The big picture of your solution.
- How your solution applies to a prospect's specific use case.

TIM Story example: Dropbox

- The internet is evolving and people are now working more digitally. However, they still carry around thumb drives to transfer large files, since you can't email them (50,000 foot)
- A third party online platform that stores files - and makes it easy to share them - is necessary (Prospect-specific level)
- But this solution has to be secure and easily accessible to all types of people (High level solution)
- That's where Dropbox comes in. We provide a secure third-party site (with additional encryption for enterprise clients) (Prospect-specific solution)
- We've worked with some of the largest companies in the world, including companies in regulated industries, securely and quickly transfer large files over the internet.

Embed Your TIM Story Into a Business Case Deck

Business case decks are for general consumption, but tweaked on a per-prospect (or per-industry / per-use case) basis. It is not a sales or pitch deck.

Outline:

- One slide: Executive summary on the business mission and benefits its solution provides.
- One slide: General proposal of how you help companies (key use cases tweaked by prospect, industry, or use case).
- Two-Four slides: Main supporting points of how you work with key use cases tweaked by prospect, industry, or use case.
- One-Two slides: Relevant case study tweaked by prospect, industry, or use case.
- One slide: Implementation plan explaining how you'd work with the prospect.
- One slide: Next steps to continue decision making and purchase.
- One slide: Thank you with your contact information.

Next Steps: ICP Mapping

Mapping ICP Access Points

After you have GTM inputs, you need to identify where you will reach your ICP to win your first 10 customers

ICP Mapping: Sources to Leverage

Personal Network

Cold Outreach

Social Media

Forums / Online Communities

Founder-Led Content Strategy

Directories

Note: This is not exhaustive.

We've included a list in the appendix of other ICP sources to map to and potentially leverage.

68% of the buying process happens before someone reaches out to you (CB Insights). That means you need to be active where your ICP lives online.

Next Steps: Linking GTM to Sales and Marketing

GTM to Marketing, Sales, and Onboarding

Your GTM strategy and stories should inform marketing copy & tactics

Here's how to get started

- Pillar piece (see next slide)
- Customer segment-specific tactics (see Forum Marketing eBook)

Your GTM strategy and stories should inform your sales scripts

Here's how to get started

- Get network intros to ICP or plan cold email nurture to get a call
- Integrate GTM messaging call agenda best practices (see appendix)

Your GTM strategy and stories should inform onboarding

Here's how to get started

- Define the path for a new user to get value
- Build onboarding education (or assistance) to get users to value.

Conclusion

When you start with marketing and sales, the GTM investment you make now will help you hit the ground running.

The tactics in the Forum Ventures Marketing eBook are all based on these GTM inputs and are designed to help you identify your ICP with $5,000 or less in marketing spend. From there, the Sales Method and all sales advice is informed by GTM inputs as well, meaning your investment in GTM will be well worth it as a foundation, even if you evolve and pivot in the future.

Good luck!

Appendix: ICP Refining Characteristics

- Geography
- Revenue
- # of employees
- Industry
- Platform
- Champion level / seniority
- Tech stack
- Champion day to day
- Ways ICP experiences the pain
- Level of champion influence (18 months - 6 years tenure is sweet spot)
- Can you network your way to an intro?
- Where the ICP lives online
- How ICP learns
- How ICP communicates
- Search terms / business terminology
- Dependencies ICP has
- Partnerships ICP already has

You can refine your ICP by nearly any characteristic you want, as long as it makes sense for your business and tracks across your whole ICP.

If you have a few features that are unique in your ICP but don't track across it, keep those documented for reference but don't use them as a fixed proxy for ICP identification.

Appendix: Pain Validation Questions

- We assume X about you, is that true?
- How do you currently accomplish [goal]?
- What's your end to end process to accomplish [goal]?
- What's the biggest challenge you face in your day to day?
- What parts of your day take up the most time?
- What is complex about your role?
- Are there adjacent processes to [goal process]?
- If a solution existed, how would you like to pay (recurring, large one time, etc.)?
- How much does this problem cost you?
- If you had a magic wand, what one thing would you change?
- Have you tried to fix your problem before? How did it go?
- What platforms have you used to try to solve this problem (keep an ear out for competitors and true alternatives)?
- Reverse psychology if they deny having a problem: "So your process must be incredibly fast then, right? Probably only taking [amount of time your solution would take]?

Appendix: Customer Discovery Questions

Person-based discovery

- What does a typical day look like?
- Who do you interact with regularly?
- What are your KPIs?
- What are your long-term goals?
- Why was your role created?

Problem-based discovery

- What are your top three problems at work?
- What processes have failed you in the past?
- What products have failed you in the past?
- How do your problems hold you back from your KPIs?

Solution-based discovery

- How are you currently solving problems?
- What do you wish you could do that you can't do today?

Personal rapport-based discovery

- Family life and kids
- Personal issues outside of work
- Career goals outside of this job

The more you can get to know your ICP as a human, not just as a job title or company representative, the closer you might get to identifying a true value lever that could unlock new sales for you.

Appendix: Pillar Story Outline

Answer these questions:

The problem

- What problem does your audience face?
- What's the impact of the problem?
- How has the problem evolved over time?
- How is the problem currently solved?

The market

- Why solve this problem now?
- What's a misconception about the market?
- What trends will impact the market?

The solution

- What current solutions exist?
- Why are current solutions inadequate?
- What is your solution?
- How is your solution unique / different?

Outline the Pillar Piece in this format:

- X problem affects Y people.
- Which has Z consequences.
- The current solutions, ABC, are inadequate for DEF reasons.
- Which has further QRS consequences.
- People really want a solution that looks like JKL.
- Our market insight shows a new way is possible.
- That leads to our solution, built in JKL ways to address DEF inadequacies, which avoids QRS consequences.
- And that yields a legitimate solution to X problem and Z consequences for Y people.

Appendix: Price Value Lever Tactics

- Price localization
- Adjust the value metric
- Leverage discounts
- Raise your prices and see what happens
- Redesign your pricing page
- Add more pricing transparency (or take it away)
- Adjust contract term lengths
- Offer freemium
- Use an add-on strategy for instant upsell
- Going up or down market

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- Leverage discounts
- Raise your prices and see what happens
- Redesign your pricing page
- Add more pricing transparency (or take it away)
- Adjust contract term lengths
- Offer freemium
- Use an add-on strategy for instant upsell
- Going up or down market

Appendix: ICP Mapping - Locations to Test

Communities

- Quora
- Reddit
- Facebook Groups
- Twitter Chats

Forums

- Stack Overflow
- WebDev
- GrowthHackers
- Inbound.org
- Product Hunt
- Roadmap.com

Referrals

- Direct ask in your network
- Incentivized (usually with more product usage or money)

Slack

- Public channels
- Premium channels
- Invite-only channels

Directories

- F6S
- Crunchbase
- AngelList
- BetaList

Review Platforms

- G2Crowd
- Capterra
- Cozdesk
- Serchen
- TrustRadius
- GetApp
- TrustPilot

Appendix: Sales Call Agenda

Call goals

Context (5-10 minutes)

- Establish humanity
- Confirm call goals
- Understand prospect roles

Why (15-20 minutes)

- Understand their problems
- Pitch your solution
- Educate around obstacles

What (10-15 minutes)

- Establish credibility
- Identify KPIs
- Contextualize value

How (10-15 minutes)

- Map the close
- Confirm and schedule follow ups

Call agenda

Context (5-10 minutes)

- Start with a joke
- Introduce yourself
- Explain and get agreement on the agenda

Why (15-20 minutes)

- Founder story
- Qualifying questions

What (10-15 minutes)

- Use cases
- Sell the benefits of your solution
- Describe ROI

How (10-15 minutes)

- Identify BANT (Best Alternative to Negotiated Terms)
- Clarify next steps

Know Your ICP Segment Size

The key to a successful GTM strategy is preparing for the right size of segment. Depending on the type of customer you're going after—SMB, Mid-Market, or Enterprise—your initial segment size will look different.

	SMB	Mid-Market	Enterprise
Initial Segment Size	1,000 - 2,500+	150 - 250	50 - 100
# of Decision Makers	1 - 4	5 - 15	15+
Rough Annual Deal Size	$5,000 - $59,999	$60,000 - $99,000	$100,000+

Use Forum's Market Sizing Template to estimate your market opportunity

Customer Call Type 2: Pain Validation

This step is when you talk to people in your ICP to validate their pains.

Step	What it is	How to do it
Check assumptions	Starting from a clean slate	Go into customer validation calls with no assumptions if at all possible. If not, clarify all assumptions up front so your takeaway insights aren't tainted.
Stay open ended	Getting the most out of answers	Never ask a leading question. Instead, keep things focused on very open-ended questions about how someone felt or acted.
Ask about the process	Understanding the big picture	When asking questions, go "down the rabbit hole," so to speak. Ask about the whole process - what comes before, after, and after that.
Embrace tangents	Learning about your ICP	Tangents can often reveal something deeper, like personal motivations or other trends that stretch across your ICP.

Customer Call Type 1: Problem Discovery

This step is when you brainstorm based on personal experience and research. If you don't have enough information or research to brainstorm, then plan discovery calls with people you think might be in your ICP.

Step	What it is	How to do it
Segment Customers	Identify ICP segments by characteristics	Take your top 10 ICP segments based on the process from Pillar 1 and further refine based on noticeable characteristics.
Identify Pain	Identify ICP pains	For each segment, list all pains they might face.
Prioritize pains	Assign order of priority of ICP pains	For each segment, prioritize pains based on which are likely to cost the most or hinder the most opportunity.
Assign costs to pains	Assign cost to ICP pains	Whether through personal experience or educated guess from research, assign a dollar value (or other tangible cost) to each pain.