Revenue Playbook

SAMPLE

hooli

Quick Finder

1. Company Overview & Revenue Strategy

1.1 About Hooli, Inc.

Hooli, Inc. is a B2B SaaS company headquartered in San Francisco, CA. Founded in 2020, Hooli provides an AI-powered workflow automation platform that enables mid-market operations, finance, and HR teams to eliminate manual processes, reduce errors, and gain real-time visibility across their business.

We are currently at Series B stage (~$42M ARR) and scaling toward $100M ARR over the next 18 months. Our go to market motion is primarily direct sales supported by a growing partner and product-led channel.

1.2 Mission & Revenue Philosophy

> **Mission:** Empower operations teams to do more with less - turning fragmented workflows into a single source of truth.

Our revenue philosophy is rooted in three principles:

- Land and Expand - Win the department, then expand to the enterprise
- Customer Obsession - Retention and expansion are as important as new logos
- Data-Driven Execution - Every stage of the funnel is instrumented in HubSpot

1.3 FY2025 Revenue Targets

Metric	Target	Owner
New ARR	$18M	VP of Sales
NRR	115%	VP of Customer Success
Pipeline Coverage	4x quota	RevOps
Avg. Deal Size (New)	$48,000 ACV	AEs
Sales Cycle Length	45-75 days	All GTM

2. Ideal Customer Profile (ICP) & Buyer Personas

2.1 Ideal Customer Profile

Our ICP is designed to optimize for deals that close faster, expand quickly, and churn less. Use the criteria below to qualify inbound and outbound targets before investing significant sales time.

Dimension	Hooli ICP
Company Size	100-2,000 employees
Revenue	$10M-$250M ARR
Stage	Series A-C or bootstrapped with scale ambitions
Verticals	SaaS/Tech, Professional Services, Healthcare Operations, FinTech
Geography	North America (primary), UK & Western Europe (secondary)
Tech Stack Fit	Uses Google Workspace, HubSpot, Slack, or Salesforce; open APIs
Pain Triggers	Rapid headcount growth, recent failed process audit, ERP/CRM rollout, M&A activity
Negative ICP	SMB (<50 employees), government/public sector, highly regulated industries without IT budget

2.2 Buyer Personas

Persona 1 - The Champion: Director of Operations ("Ops Olivia")

Olivia runs day to day operations. She feels the pain most and is usually the internal champion who initiates vendor evaluation.

- Title: Director of Operations, VP of Operations, Head of RevOps
- Goals: Reduce manual work, improve team output, reduce errors in cross-functional processes
- Pain Points: Spends 30%+ of her week chasing down approvals, updating spreadsheets, and answering status questions

Persona 2 - The Economic Buyer: CFO / VP Finance ("Budget Brian")

Brian signs the checks. He cares about ROI, security compliance, and total cost of ownership. He’s rarely the initiator but always the final approver.

- Title: CFO, VP Finance, Controller
- Goals: Reduce operational overhead costs, improve financial reporting accuracy
- Pain Points: Audit prep takes weeks, no single source of truth for spend/headcount data

Persona 3 - The Influencer: IT / Systems Lead ("Tech Tyler")

Tyler evaluates security, integration, and implementation complexity. He can be a blocker if not engaged early.

- Title: IT Manager, Systems Architect, Head of IT
- Goals: Minimize integration risk, ensure SOC 2 compliance, reduce shadow IT
- Pain Points: Tired of one-off tools that don't integrate well; worried about data governance

3. Messaging & Value Proposition

3.1 Core Value Proposition

> **Elevator Pitch:** Hooli is the workflow automation platform built for operations teams at growing companies. We replace the spreadsheets, manual handoffs, and siloed tools with a single connected layer - so your team can execute faster and leadership can see everything in real time.

3.2 Messaging by Persona

Persona	Core Message	Proof Point
Ops Olivia	Automate the busywork so your team can focus on what matters.	Customer-X reduced manual handoffs by 70% in 90 days.
Budget Brian	Hooli delivers measurable ROI in 6 months - backed by a guaranteed SLA.	The average customer saves 1.2 FTE within the first year.
Tech Tyler	Native integrations with your existing stack. SOC 2 Type II certified.	< 2-week implementation, no-code configuration, dedicated Slack channel.

3.3 Competitive Differentiators

When competitors come up in deals, use the following:

vs. Competitor A (Notion/ClickUp hybrids)

- They are collaboration tools, not automation engines
- Hooli executes logic and routes actions automatically - they require manual updates
- Win message: "You don't need another place to store information. You need a system that acts on it."

vs. Competitor B (Enterprise platforms - ServiceNow, Workato)

- We deploy in weeks, not quarters. No professional services required
- Lower TCO: no implementation partner fees, no per-flow pricing model
- Win message: "Enterprise power, mid-market speed and price."

3.4 Objection Handling Cheat Sheet

Objection	Recommended Response
"We already use X-tool"	Great - Hooli integrates natively with [tool]. We often complement it by automating the processes that live between tools
"Your price is too high"	Let's look at the ROI model together. Most customers recoup cost within 6 months through headcount savings alone. Would it be helpful for me to build a custom model for your team to review?
"We need to involve IT/Legal"	Absolutely - let's schedule a technical deep dive. We're SOC 2 Type II and have a security review packet ready. Who should we loop in?
"We're not ready right now"	Understood. What would need to be true for you to prioritize this in Q3? Let's stay connected and I'll send our ROI benchmark report in the meantime

4. Revenue Channels

4.1 Channel Overview

Hooli's revenue comes from three primary GTM channels. Each has distinct ownership, KPIs, and supporting motions.

Channel	% of Pipeline	Avg. ACV	Owner
Outbound Sales	50%	$52,000	SDR + AE Team
Inbound / Marketing	30%	$38,000	Marketing + SDR
Partner / Referral	20%	$61,000	Partnerships Lead

4.2 Outbound Sales Motion

Our outbound motion is a coordinated, account-based approach. SDRs focus on strategic account lists built by RevOps in HubSpot and enriched via Apollo.io and LinkedIn Sales Navigator.

Outbound Sequence - Standard (18-touch, 14 days)

1. Day 1: Personalized LinkedIn connection request + email #1 (pain-led, no product pitch)
2. Day 2: LinkedIn InMail if not connected
3. Day 4: Email #2 (relevant case study or benchmark data)
4. Day 6: Phone call attempt #1 + voicemail
5. Day 8: Email #3 (video prospecting via Loom)
6. Day 10: Phone call attempt #2
7. Day 13: Email #4 (break-up email with low-friction CTA)
8. Day 14: Final LinkedIn touch

4.3 Inbound / Marketing-Assisted Motion

Inbound leads flow into HubSpot from the following sources: website demo requests, content downloads (ROI calculator, benchmark reports), webinars, and G2/Capterra reviews.

- MQL Threshold: Score of 45+ in HubSpot Lead Scoring model
- SLA: SDR must contact MQL within 4 business hours of MQL trigger
- Routing: HubSpot workflows auto-assign by territory; Slack #inbound-leads alert fires simultaneously

4.4 Partner & Referral Channel

Partners include implementation consultants, fractional CFO networks, HR tech resellers, and adjacent SaaS platforms with complementary customer bases.

- Partner deal registration: logged in HubSpot under Company > Deals > Partner Sourced tag
- Commission: 10% of first-year ACV paid to referring partner at close
- Referral partner onboarding packet: available in Google Drive /Partnerships/Onboarding

5. Sales Process

5.1 Sales Stage Definitions

Stage	Close %	Exit Criteria
1. Prospecting	5%	Account researched, contact identified, outreach initiated
2. Discovery Scheduled	15%	Meeting confirmed on calendar; pre-call research completed
3. Discovery Complete	25%	Pain confirmed, budget range confirmed, stakeholders identified, next step agreed
4. Demo / Evaluation	40%	Product demo delivered, technical fit confirmed, champion identified
5. Proposal Sent	50%	Pricing proposal sent via DocuSign, verbal commitment to review
6. Negotiation	80%	Legal/security review in progress or complete; final commercial terms being aligned
7. Closed Won	100%	MSA and Order Form executed via DocuSign
8. Closed Lost	0%	Loss reason logged; loss debrief scheduled within 5 business days

5.2 Discovery Call Framework (MEDDPICC)

All AEs and SDRs are expected to qualify opportunities using the MEDDPICC framework. Use HubSpot deal properties to capture each element.

- M - Metrics: what does success look like in numbers? (time saved, error rate, cost reduction)
- E - Economic Buyer: who controls the budget? Have we spoken to them?
- D - Decision Criteria: what does "good" look like to the committee?
- D - Decision Process: how have they bought software before? Who is involved?
- P - Paper Process: who owns legal/security review? What is their typical timeline?
- I - Identify Pain: what is the cost of not solving this today?
- C - Champion: who will fight for us internally when we're not in the room?
- C - Competition: who else are they evaluating? What are the selection criteria?

> **Pro Tip:** Log MEDDPICC notes directly in the HubSpot deal record under the 'Discovery Notes' field after every call. This is required for pipeline reviews.

5.3 Demo Best Practices

Demos should be tailored, not generic. Follow the 3-part demo structure:

9. The Setup (5 min): Restate the pain discovered. “Based on our last conversation, you told us X, Y, and Z. For today’s agenda, I’ll show you exactly how Hooli solves those things. Is there anything else you wanted covered today that I’ve missed?”
10. The Solution Walkthrough (25 min): Show only features relevant to their stated pain. Use their company name and data in the demo environment when possible.
11. The Close (10 min): Define next steps. Lock in a follow-up meeting before leaving the call.

6. HubSpot SOPs

6.1 HubSpot is our System of Record

HubSpot is Hooli's single source of truth for all revenue activity. Nothing counts unless it's in HubSpot. This means every contact, company, deal, activity, and communication must be logged.

> **Rule #1:** If it's not in HubSpot, it didn't happen. No pipeline review will include deals without complete required fields.

6.2 Required Deal Properties (All Stages)

- **Deal Name: [Company Name] - [Product Tier] - [Quarter]**
- **Close Date: Can never be in the past**
- **Deal Amount: Required before Stage 4**
- **Deal Stage: Updated same-day as progression**
- **Lead Source: How the opportunity originated (Outbound, Inbound, Partner)**
- **Notes: Updated after every discovery or champion call**
- **Next Step: Always include date + action**

6.3 Key Workflow Automations

MQL to SDR Alert

When a lead's HubSpot score reaches 45+, an automated workflow fires: (1) assigns the contact to the correct SDR by territory, (2) sends a Slack message to #inbound-leads, and (3) creates a task due within 4 hours

Deal Stage to Notification

When a deal moves to Stage 5 (Proposal Sent), a DocuSign envelope is auto-drafted and sent via the HubSpot-DocuSign integration. The AE receives a follow-up task 48 hours after send if the envelope remains unsigned

Closed Won to CS Handoff

When a deal is marked Closed Won: (1) a HubSpot workflow creates a CS onboarding ticket in the Service Hub, (2) a Slack message fires in #cs-new-customers, and (3) the DocuSign Order Form is stored automatically in the deal record's attachments

6.4 Activity Logging Requirements

Activity Type	Log Within	How
Discovery Call	24 hours	Call notes in HubSpot + MEDDPICC field update
Email (outbound)	Auto-logged	Gmail integration auto-syncs
Proposal / Quote	Same day	DocuSign integration auto-attaches
Executive Meeting	Same day	Log as 'Meeting' activity type + summary in notes
Verbal Commitment	Same day	Update Deal Stage + note in Next Steps field

6.5 Pipeline Review Cadence

- Weekly: AE 1:1 with Sales Manager - review all Stage 3-6 deals; update Next Steps

- Bi-weekly: Full team pipeline review - all active deals Stage 2+; flag at-risk deals
- Monthly: RevOps audit - validate stage accuracy, close date hygiene, lead source attribution

7. Proposal, Pricing & DocuSign Process

7.1 Pricing Overview

Hooli uses a tiered pricing model based on number of users and workflow volume. AEs have up to 10% discount authority without needing approval; anything above 15% requires VP of Sales approval.

Tier	Users	Annual Price	Includes
Starter	Up to 25	$18,000 ACV	5 workflow templates, standard support
Growth	26-150	$48,000 ACV	Unlimited workflows, dedicated CSM, Slack integration
Enterprise	150+	Custom	Custom SLA, SSO, advanced analytics, executive reviews

> **Discount Authority:** AE: up to 10% | Sales Manager: up to 15% | VP of Sales: up to 25% | CEO approval required above 25%

7.2 Proposal Process

12. AE builds quote in HubSpot Quotes - pulls pricing from approved product catalog
13. AE sends to Sales Manager for review if discount > 10%
14. Upon approval, quote is converted to a DocuSign envelope via HubSpot integration
15. Envelope sent to Economic Buyer (signer) and Champion (CC) via DocuSign
16. HubSpot deal stage auto-updates to Stage 5 (Proposal Sent)
17. Follow-up task auto-created for T+2 business days if unsigned

7.3 DocuSign Signing Order

All contracts follow this signature order to minimize delays and ensure legal compliance:

18. Champion / Technical Contact - reviews and approves scope
19. Economic Buyer / Signer - reviews and signs MSA + Order Form
20. Hooli Countersignature - VP of Sales countersigns within 1 business day of customer execution

> **Important:** **Never** send final pricing via email attachment. All proposals must flow through HubSpot Quotes → DocuSign to ensure proper version control and audit trail.

8. Closed Won & Closed Lost Processes

8.1 Closed Won Process

Winning a deal is step one - a smooth handoff to Customer Success is what drives retention and expansion. Follow this checklist immediately upon receiving the countersigned contract.

Day 0 - Close Day

- Mark deal as Closed Won in HubSpot (triggers CS handoff workflow automatically)
- Verify all required deal fields are complete before marking Closed Won
- Post a celebration message in #wins Slack channel with deal size and company name
- Email the customer a personal thank-you within 2 hours of signature

Day 1 - Internal Handoff

- Complete the Customer Handoff Document (Google Drive /Sales/Handoff Templates)
- Schedule a 30-min internal sync between AE, CSM, and Implementation Lead
- Brief the assigned CSM on: champion, key pain points, success metrics, stakeholder map, any commitments made during the sale

Days 2-5 - Customer Kickoff Prep

- CSM sends kickoff invite within 2 business days
- AE joins the kickoff call to provide warm introduction and then transitions to CSM
- AE remains CC'd on customer email for first 30 days, then fully transitions

8.2 Closed Lost Process

Every loss is a learning opportunity. Closed Lost deals must be documented thoroughly to improve win rates over time.

> **Requirement:** All Closed Lost deals must have a Loss Reason and Loss Notes field completed in HubSpot within 24 hours of marking the deal lost.

Required HubSpot Fields - Closed Lost

- Loss Reason (dropdown): Price, Competitor, No Decision/Timing, Missing Feature, Internal Reprioritization, Champion Left
- Lost To (if applicable): Name of winning competitor
- Loss Notes: 3-5 sentences describing what happened and if anything could have changed the outcome

- Loss Debrief: Schedule within 5 business days with AE + Sales Manager (only for Enterprise deals)

Loss Debrief Agenda (30 minutes)

21. What did we learn in discovery that was accurate?
22. What did we miss or misunderstand?
23. At what stage did we lose control of the deal?
24. What could we have done differently?
25. Any product feedback or competitive intel to share with Product/Marketing?

8.3 Re-Engagement Strategy

Closed Lost deals are not dead forever. RevOps runs a quarterly re-engagement campaign targeting deals lost for timing, budget, or internal reprioritization reasons.

- RevOps generates a 'Re-Engage' list from HubSpot every quarter
- SDRs are assigned to re-engage accounts lost 6+ months ago
- Email templates and cadences for re-engagement available in HubSpot Sequences > Re-Engage library

9. Team Tools & Communication Standards

9.1 GTM Tech Stack

Tool	Category	Primary Use
HubSpot	CRM / Automation	Deal management, contact records, sequences, reporting
Google Workspace	Productivity	Email (Gmail), calendar (Calendar), docs/slides for proposals and collateral (Drive)
Slack	Communication	Internal team comms, deal alerts, CS handoff notifications
DocuSign	Contract Execution	MSA and Order Form delivery, countersignature, archiving
Apollo.io	Prospecting	Contact enrichment, outbound sequence execution, dialer
LinkedIn Sales Nav	Prospecting	Account research, champion identification, InMail outreach
Gong	Conversation Intel	Call recording, coaching, deal risk scoring, notes
Loom	Video recording	Personalized video prospecting messages

9.2 Slack Channel Directory (Revenue Team)

- #sales-team - General sales team announcements and discussion
- #wins - Post Closed Won deals (required for all AEs)
- #inbound-leads - Auto-alerts for new MQLs; SDR must respond within 4 hrs
- #pipeline-review - Pre-meeting deal updates before weekly pipeline call
- #cs-new-customers - CS handoff notifications from HubSpot automation
- #competitive-intel - Share competitor intel, battle cards, win/loss insights
- #revops - Revenue Operations announcements, HubSpot updates, process changes

9.3 Meeting Cadence

Meeting	Frequency	Duration	Owner
AE 1:1 w/ Sales Manager	Weekly	45 min	Sales Manager
SDR 1:1 w/ SDR Manager	Weekly	30 min	SDR Manager
Full Team Pipeline Review	Bi-weekly	60 min	VP of Sales
AE/CSM Deal Handoff	Upon CW	30 min	AE
GTM Leadership Sync	Weekly	30 min	VP Sales + VP Marketing
QBR	Quarterly	2 hours	VP of Sales + RevOps

10. Performance Metrics & Reporting

10.1 KPIs by Role

SDR KPIs (Monthly)

Metric	Target	Minimum
SQLs Created (Outbound)	18 / month	12 / month
Outbound Touches (calls + emails)	400 / month	280 / month
Discovery Meetings Booked	12 / month	8 / month
Inbound MQL Response Rate (< 4 hrs)	95%	85%

AE KPIs (Monthly)

Metric	Target	Minimum
New ARR Closed	$125K / month	$80K / month
Active Opportunities (Stage 3+)	20+	12
Win Rate (Stage 2 to Closed Won)	25%	18%
Average Deal Size	$48K ACV	$32K ACV
Pipeline Coverage Ratio	4x quota	3x quota

10.2 Reporting Dashboard

The following HubSpot dashboards are maintained by RevOps and reviewed weekly. All GTM team members should bookmark and check these regularly:

- Pipeline Health Dashboard - Stage breakdown, deal velocity, at-risk deals
- SDR Performance Dashboard - Sequences, MQL response times, meetings booked
- AE Leaderboard - ARR closed, quota attainment, win rate by rep
- Revenue Forecast - Weighted pipeline by close month, scenario analysis
- Marketing Funnel Report - MQL volume, source breakdown, MQL to SQL conversion

10.3 QBR Framework

Quarterly Business Reviews are held within the first two weeks of each new quarter. AEs are expected to prepare and present their QBR deck using the standard template (Google Drive /Sales/QBR Templates).

QBR Deck Structure

26. Last Quarter: Quota attainment, wins/losses, pipeline performance vs. target
27. Top Deals: Status of top 5 opportunities by ACV; next steps, where leadership can help
28. Lessons Learned: 2-3 things that worked; 2-3 things that need to change
29. Next Quarter Plan: Pipeline coverage, focus accounts, personal development goals

> **Final Note:** This playbook is a living document. You all have edit access as every member of the team is required to keep this Playbook up to date. Major revisions are reviewed quarterly. Every team member is responsible for knowing, updating and following the processes outlined here.