PREPARED FOR · ANONYMIZED CLIENT

Ideal Client Profile & Buyer Persona Development

A strategic analysis of ANONYMOUS Ideal Client Profile, Market Opportunity, and Buyer Persona

Target Market Definition

ANONYMIZED · GTM Analysis

FIRMOGRAPHIC PROFILE

Geography	United States & Canada
Revenue	$10M - $500M ARR
Headcount	200 - 2,500 employees
Stage	Series B through Pre-IPO
Ownership	VC-backed or PE-backed
Industries	Fintech, InsurTech, Payments, Embedded Finance
Tech Stack	Salesforce, HubSpot, Looker, JIRA, Stripe
Model	B2B SaaS / API-first platform

EXAMPLE ACCOUNTS (ANONYMIZED)

Client A
Payments infrastructure SaaS · Series C · ~$90M ARR

Client B
Accounting automation SaaS · PE-backed · ~$120M ARR

Client C
Embedded lending platform SaaS · Series B · ~$70M ARR

TOTAL ADDRESSABLE MARKET

~11,400	$8.5B	44% / 56%
Qualifying Companies	Estimated TAM Value	Greenfield / Replacement

Target ACV	$85,000 - $150,000
Close Rate (New)	~12% greenfield / consultative
Close Rate (Disp)	~6% competitive displacement

TRIGGER EVENTS TO PRIORITIZE

- Series B/C close- new capital, growth mandate, board pressure on GTM
- New CRO or VP Sales hired in the last 90 days
- Missed Q2/Q3 revenue targets- board scrutiny on pipeline
- Entering a new vertical or geography
- SDR/BDR headcount expansion with no formal playbook in place
- Recent M&A- integrating sales orgs or systems

TECHNICAL BUYER · Director of Revenue Operations

PROFILE

The operational nerve center of the sales org. Owns the tech stack, data, process and the CRO's trust. Didn't get the budget approved, but is the reason the project lives or dies. If this persona doesn't believe in the engagement, it doesn't happen.

DEMOGRAPHICS & PSYCHOGRAPHICS

Age	32 - 42
Location	Major metro (Austin / NYC / SF)
Seniority	Director / Senior Manager
Function	Revenue Operations / Sales Operations
Experience	6 - 12 years in Sales Ops or RevOps
Education	BS Business, Finance, or CS
DISC Profile	High C, moderate D
Buying Role	Champion- qualifies, builds internal case
Life Event	Recently inherited a broken CRM instance

PRIORITIES & GOALS

- Clean, reliable pipeline data the CRO can present to the board
- Reduce manual reporting overhead for AEs and SDRs
- Build a scalable outbound motion ahead of the next raise
- Prove RevOps impact before next performance review

WHERE TO FIND THEM

- LinkedIn: posts on RevOps, stack consolidation, Salesforce
- Communities: RevGenius, Pavilion, Modern Sales Pros communities
- Podcasts: Revenue Builders, The RevOps Show
- Influencers: Jen Spencer, Jacco van der Kooij

CURRENT CHALLENGES

Challenge 1

Pipeline visibility is fragmented- reps enter data inconsistently, making forecasting guesswork

Challenge 2

No documented outbound playbook; each SDR/ AE runs their own process with wildly different results

Challenge 3

Leadership wants 3x pipeline but hasn't added headcount- asked to do more with the same team

MOTIVATED BY

▶ Motivation 1

Be seen as a strategic contributor, *not* a glorified admin

▶ Motivation 2

Building toward a VP RevOps title within 18 months

▶ Motivation 3

Believes the right process infrastructure unlocks team performance

OBJECTIONS TO LISTEN FOR

"We can figure this out internally."

Acknowledge capability and redirect to bandwidth and timeline cost. Ask how long it's been on the roadmap.

"I need sign-off from the CRO."

Great! Offer to co-build the internal business case, including board-ready framing.

ICP COMMUNICATION STYLE

- Lead with process and data- not vision or transformation
- Use their stack's language (HubSpot, Salesforce, Outreach, Gong)
- Skip the ROI pitch- show the specific operational fix
- Short structured emails, one specific ask, link to something concrete

DECISION MAKER · Chief Revenue Officer

PROFILE

New to role (<12 months), recruited from a larger SaaS company. Inherited a talented-but-undertrained team, a messy CRM, and a board expecting 2.5x growth by EOY. Not looking for vendors- looking for operators who've done this before and can move fast.

DEMOGRAPHICS & PSYCHOGRAPHICS

Age	38 - 52
Location	Remote-first or major metro
Seniority	C-Suite / VP
Function	Revenue / Sales Leadership
Experience	15 - 25 years in B2B sales leadership
Education	MBA preferred · BS Business or Finance
DISC Profile	High D, moderate I
Buying Role	Economic Decision Maker- final approval authority
Life Event	New to role, under significant board pressure

PRIORITIES & GOALS

- Hit the ARR target- non-negotiable board commitment
- Build a repeatable, forecastable outbound engine within 60 days
- Identify top performers and create accountability for underperformers
- Establish credibility with the CEO and board before 12-month review

WHERE TO FIND THEM

- LinkedIn: strategic posting (wins, hiring, company milestones)
- Communities: Pavilion (Executive track), SaaStr events
- Podcasts: CRO Confidential, 20 Minutes with the CEO
- Influencers: Mark Roberge, Keenan (Gap Selling), David Brock

CURRENT CHALLENGES

Challenge 1
Inherited a reactive sales culture with no documented process- reps wing every call

Challenge 2
Board visibility into pipeline is poor as weekly forecasting done manually in spreadsheets

Challenge 3
Needs to scale AE headcount in Q2 but has no onboarding infrastructure to ramp them

MOTIVATED BY

▶ **Motivation 1**
Deliver a career-defining growth run- the chance to own a full-cycle build

▶ **Motivation 2**
Build a team and culture they're proud of, not just hit a number

▶ **Motivation 3**
Earn the CEO's confidence and secure their seat at the leadership table

OBJECTIONS TO LISTEN FOR

"Prove you understand Fintech sales."

Lead with specifics- ARR benchmarks, GTM patterns, persona nuances unique to the space. Reference analogous profiles.

"I need this working in 30 days."

Confirm urgency. Anchor on a structured quick-win sprint. Show the 30/60/90 activation plan before they ask.

ICP COMMUNICATION STYLE

- Lead with outcome, then evidence- no preamble, no setup
- Frame everything against board expectations and ARR milestones
- Be direct- avoid hedge language like 'potentially' or 'could help'
- Reference analogues: 'we built this motion for a Series C fintech in Q1'

Mid-market Fintech SaaS · Series C

INFLUENCER · VP of Sales Enablement

PROFILE

Sits between the CRO & Sales. Owns onboarding, playbooks, content, and coaching. If the engagement doesn't account for their team's bandwidth and existing programs, they'll quietly torpedo it. Win this persona over and they become your loudest internal advocate.

DEMOGRAPHICS & PSYCHOGRAPHICS

Age	30 - 44
Location	Remote / major metro
Seniority	VP / Senior Director
Function	Sales Enablement / L&D
Experience	8 - 15 years in sales, enablement, or training
Education	BS Education, Communications, Business, or Psychology
DISC Profile	High S, high C
Buying Role	Influencer- shapes requirements, advises the CRO
Life Event	Recently promoted or stepping into a newly created function

PRIORITIES & GOALS

- Reduce AE ramp time from 5+ months to under 90 days
- Prove enablement ROI in revenue impact- not activity metrics
- Build a scalable coaching framework frontline managers can run independently
- Standardize the pitch across product lines that currently have different decks

WHERE TO FIND THEM

- LinkedIn: thoughtful, longer-form posts on enablement strategy
- Communities: Sales Enablement Society, Highspot community, Seismic user groups
- Podcasts: The Enablement Edge, Sales Enablement PRO
- Influencers: Tamara Schenk, Peter Ostrow (Forrester)

CURRENT CHALLENGES

Challenge 1

Content created ad hoc by AEs- reps use whatever version is in their Downloads folder

Challenge 2

No consistent discovery or qualification framework- win/loss analysis is informal at best

Challenge 3

Manager coaching is inconsistent- some run weekly deal reviews, others don't at all

MOTIVATED BY

▶ Motivation 1

Build enablement into a true strategic asset- not a content library with a Slack channel

▶ Motivation 2

Earn respect from the sales floor- wants reps to pull from enablement, not have it pushed

▶ Motivation 3

Build a proof point portfolio they can take to a future VP or CCO role

OBJECTIONS TO LISTEN FOR

"We already have a playbook- we just need enforcement."

Validate the investment, then ask what enforcement has looked like. Surface the gap between content creation and actual adoption.

"The CRO is the one you need to convince."

Affirm their role, then ask what a successful engagement looks like from their perspective. Let them co-design the success criteria.

ICP COMMUNICATION STYLE

- Acknowledge existing programs before proposing anything new
- Show how the engagement makes them look good to the CRO
- Avoid jargon they didn't invent- ask about their frameworks first
- Give them a seat in the design process, not just in the delivery

ECONOMIC BUYER · Chief Financial Officer

PROFILE

Controls budget & timeline. Doesn't attend early calls, but is involved in every contract before signing. Not anti-growth, but they *are* anti-ambiguity. If the business case is tight, scope is defined, and risk is contained, they'll sign. If not, they stall until they aren't.

DEMOGRAPHICS & PSYCHOGRAPHICS

Age	40 - 58
Location	Company HQ , Remote
Seniority	C-Suite (CFO / VP Finance / Controller)
Function	Finance / FP&A
Experience	15 - 30 years in finance or Big 4 advisory
Education	MBA / CPA / CFA- often all three
DISC Profile	Very high C, moderate D
Buying Role	Financial approver- rarely initiates, always closes
Life Event	Preparing for Series D raise or FY budget reforecast

PRIORITIES & GOALS

- Maintain 18+ month runway while accelerating GTM spend ahead of Series D
- Establish OKR-linked budget accountability across revenue teams
- Reduce unplanned vendor proliferation and consolidate where possible
- Ensure external engagements have defined deliverables, milestones, and exit clauses

WHERE TO FIND THEM

- LinkedIn: sparse posting, heavy consumption
- Communities: CFO Connect, CFO Alliance peer communities
- Podcasts: The CFO Playbook, Controller Conversations
- Publications: CFO Dive, WSJ CFO Journal

CURRENT CHALLENGES

Challenge 1

Revenue team spend growing faster than revenue- burn multiple is under board scrutiny

Challenge 2

No single source of truth for sales performance data tied to financial reporting

Challenge 3

Past consulting engagements delivered decks, not outcomes- they're skeptical of the category

MOTIVATED BY

▶ **Motivation 1**

Protect runway while enabling the CRO to hit growth targets- needs the math to work

▶ **Motivation 2**

Build CFO credibility as a growth partner, not just a cost controller

▶ **Motivation 3**

Position the company's financial story cleanly for Series D investors

OBJECTIONS TO LISTEN FOR

"I need to see clear ROI before I approve this."

Don't lead with percentages. Lead with dollars and timelines. Quantify the cost of the current state: missed quota, ramp drag, attrition.

"Can we start with a smaller pilot?"

Accept enthusiastically. Structure the pilot with defined entry/exit criteria and clear expansion triggers- gives them control while keeping momentum.

ICP COMMUNICATION STYLE

- Lead with scope definition and milestones- not outcomes or vision
- Show the cost of inaction in dollar terms, not percentages
- Offer a pilot with defined entry/exit criteria and expansion triggers
- Never say 'pays for itself'- show the real metrics

ICP Copywriting & Communication Framework

ANONYMIZED · Buyer Communication Guide

✓ WORDS & PHRASES TO USE

- Pipeline velocity- speaks to speed and momentum, not just volume
- Repeatability- every operator wants a machine, not a one-off win
- Ramp efficiency- quantifiable, tied to headcount ROI
- Conversion rate by stage- specific, measurable, board-ready
- Time to first qualified meeting- concrete activation metric
- Systematic / structured- implies control, not chaos
- Milestone-based- signals defined accountability
- Expansion-ready motion- implies future scale, not just today's fix

✗ WORDS & PHRASES TO AVOID

- "Pays for itself"- too salesy, loses credibility with operators immediately
- "End-to-end solution"- vague, sounds like vendor-speak
- "Best practices"- implies generic, not tailored to their context
- "Synergies"- no one in Fintech takes this seriously
- "Transformational"- overused; show transformation, don't name it
- "Unlock potential"- too abstract for a CFO or CRO
- *Excessive* ROI percentages without a clear methodology
- "Seamless"- meaningless without the actual integration story

HOW TO STRUCTURE COMMUNICATIONS WITH THIS BUYING COMMITTEE

1. Open with their stated pain- not your pitch
2. Name the operational cost of that pain in their language
3. Show a specific, scoped fix- not a transformation
4. Offer a defined next step with a clear time commitment
5. Close every message with one CTA, not multiple