GTM audit template

For B2B SaaS startups

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Conducting a GTM audit

Digging in to determine what's working, what's not, and how to course correct

Deliverable:

- 5–7 page GTM audit report with a thorough analysis of the current situation as well as recommendations for how to improve it

Conducting a GTM audit includes:

- Thorough review and analysis of ICP & personas, problem/solution, competition, pricing & packaging, positioning & messaging, sales pitch, marketing channels & partnerships, sales enablement, internal alignment, and product adoption
- Internal interviews with key stakeholders across Product, Sales, Marketing, Customer Success, etc.
- Listening to 10-15 sales call recordings and 10-15 CSM renewal/churn calls
- Conducting a thorough win/loss analysis of both CRM data and interviews with 5–7 prospects
- Review of positioning and messaging, pitch deck, sales collateral, and sales outreach, etc.

The 10 key elements of a GTM audit

Foundation

1. ICP & personas
2. Problem/solution
3. Positioning & messaging
4. Pricing & packaging
5. Competition

Execution

6. Sales pitch
7. Marketing channels & partnerships
8. Sales enablement
9. Product adoption

10. Internal alignment

ICP & personas

Questions	Methods
Marketing • Do events, advertising, content, and leads align with defined ICP and target personas? • Does internal documentation (ICP and personas) match other team's perceptions?	❑ CRM analysis ❑ Internal surveys and interviews with onboarding, marketing, product, customer success, and sales teams ❑ Win/loss analysis ❑ SDR outreach analysis
Sales • Are the key members of the buying committee included in target personas? • Is win rate higher for ICP vs. non-ICP opportunities? • Are SDRs having success with outreach to target ICP/personas?	
Customer success Does the ICP: • Adopt the product faster than non-ICP customers? • Have higher NPS & CSAT scores than non-ICP customers? • Have lower churn and higher renewal/upsell/ACV than non-ICP? • Do buyers, users, and implementers line up with our outarget personas?	

Problem/solution

Questions	Methods
Problem/solution • What specific problem does the product solve for the ICP? (identify top 3 pain points) • What are the consequences/impact if the problem is not resolved? (i.e., why is this important?) • How does your solution improve upon existing alternatives? • What are the benefits and value of solving this problem? • What are the benefits and value of solving this problem with this product?	❑ Win/loss analysis (expectation) ❑ Customer interviews (reality) ❑ Product usage analytics
Product • Where are users getting value from the product? • Does product usage match perceived value – as defined by employees, prospects, and customers? • Are there features or benefits that your customers value but are under-communicated? • How do these align with the direction your product roadmap is heading in? • Is there a mismatch between what buyers want and what you're building?	

Positioning & messaging

Questions	Methods

Marketing & sales
• Have we defined the value we deliver?
  o Is there internal alignment on how to talk about the product?
  o Does the packaging and pricing strategy support the product narrative?
  o Does the broader marketing team know where to access this documentation?
• Are products positioned consistently across sales collateral, marketing content, and web?
• Does the sales team have consistent pitches?
• What story do the most effective sellers at your company tell?
	❑ Evaluation of positioning & messaging, pitch deck, sales collateral, website, and SDR outreach
	❑ Internal interviews with product, sales, marketing, customer success, etc.
	❑ Analysis of 10–15 sales call recordings and 10–15 CSM renewal/churn calls
	❑ Win/loss analysis
	❑ Customer interviews

Prospect & customer perceptions • What space does the company occupy in the buyer's mind? • Is positioning & messaging clear and differentiated? • Does it resonate (and align with) with prospects/customers' perceptions and experiences?	

Pricing & packaging

Questions	Methods
Internal alignment • Is there one source of truth for pricing and packaging + internal alignment on discounting? • Do key stakeholders have the same understanding of the company's pricing and packaging?	❑ Competitive analysis ❑ Internal interviews with product, sales, marketing, customer success, etc. ❑ Analysis of 10–15 sales call recordings and 10–15 CSM renewal/churn calls ❑ Churn analysis ❑ Win/loss analysis ❑ Customer interviews
Perception • Does the chosen value metric truly correlate with value? • Does pricing model match positioning? (e.g., easy to do business with = simple pricing) • Does pricing match quality perceptions among prospects, customers, and Sales? • How does pricing compare to the competition? Does it align with the value delivered?	
Renewal/churn • Is there a standardized process in place for renewals that includes automated renewals at X% price increase? • Is price cited as the sole (or major) factor in >15% of churn reasons?	

Competition

Questions	Methods
Internal alignment • Is there alignment on which competitors are the biggest threats today and in the near future? • Is there a plan on how to overcome those competitors?	❑ Competitive analysis ❑ Internal interviews with product, sales, marketing, customer success, etc. ❑ CRM analysis ❑ Win/loss analysis ❑ Analyst reports ❑ Reviewing social media forums and industry groups for company mentions
Sales • Is sales empowered with battlecards and objection handling content and is it effective? • Is there an open communication channel between sales/CS and product to communicate prospect/customer-requested product updates/features?	
Marketing • Are competitors thoroughly documented (positioning/messaging, pricing/packaging, features, content, etc.)? • Which competitors show up most prominently in channels (events, digital ads, social, etc.)? • How do competitors stack up on review sites (G2, Capterra, TrustPilot, etc.)?	
Renewal/churn • What are the top 5 competitors mentioned most frequently in churn conversations?	

Sales pitch

Questions	Methods
Internal alignment • Is there internal alignment on the sales pitch? • Does everyone across the org, from the C-suite, to sales, to CSMs and support use the same key elements for their pitches?	❑ Evaluation of positioning & messaging, pitch deck, sales collateral, website, and SDR outreach ❑ Internal interviews with product, sales, marketing, customer success, etc. ❑ Analysis of 10–15 sales call recordings and 10–15 CSM renewal/churn calls ❑ Win/loss analysis
Sales • Do reps know how to tell the company's narrative? • What stories/examples do the most effective sellers tell? • Is there a consistent narrative regardless of the sales rep pitching? • Do specific narratives perform better with certain customers vs. others?	
Marketing • Does the sales pitch align with the messaging that's present on the website, sales collateral, and content? • Does marketing content set up a frame of reference for the buyer?	

Marketing channels & partnerships

Questions	Methods
Internal alignment • Which marketing channels/partnerships deliver the most qualified leads? (based on data) • And does that alignment = doubling down on that investment?	❑ Internal interviews with product, sales, marketing, customer success, etc. ❑ CRM analysis ❑ Market analysis
Sales • Is sales familiar with key partners and how their communities, technologies, distribution work? • Is there clear communication and coordination with these partners?	

Marketing
• Has customer research been conducted to identify:
  • How target personas learn? Where they go to for information and referrals?
  • What events they attend, communities/groups they are in, and the influencers they trust?
• Which channels and partnerships deliver the most qualified leads?
• Is there clear communication and coordination with these partners?
• Are there opportunities for new partnerships/channels that haven't been explored?	

Sales enablement

Questions	Methods
Internal alignment • Are there mechanisms for sales and customer success to share their experiences and feedback, along with customer feedback, in the CRM and with product and marketing?	❑ Internal interviews with product, sales, marketing, customer success, etc. ❑ Analysis of 10–15 sales call recordings and 10–15 CSM renewal/churn calls ❑ Win/loss analysis ❑ SDR outreach analysis ❑ Sales collateral evaluation
Sales • Does sales understand the product, competitive landscape, and market + are they comfortable with the training they've received on the sales pitch and demo? • Do they have the sales collateral (pitch deck, one pagers, battlecards, objection handling, scripts, email templates, lead lists etc.) they need, and do they know where to access it? • In an ideal world, what other type of content are they looking for?	
Marketing • Is sales collateral stored in one place, with usage tracked? • Can sales reps customize collateral to some extent?	

Product adoption

Questions	Methods
Internal alignment • Is there an onboarding process in place that enables users to adopt the product successfully? • Is product adoption clearly defined via specific user-level and account-level actions, metrics, and engagement? • Is this definition understood, and set as the goal, across teams?	❑ Internal interviews with product, sales, marketing, customer success, etc. ❑ Analysis of 10–15 CSM renewal/churn calls ❑ Renewal/churn analysis ❑ CSM outreach analysis ❑ Product adoption analysis

Product/customer success/marketing
• Has there been analysis conducted to identify the minimum level of adoption and engagement that results in renewal?
• Are there systems in place to promote that adoption (progressive product adoption)?
  ○ Emails/pop-ups/CSM outreach triggered by user behavior
  ○ Documentation site, product tours, LMS courses and/or certifications, embedded case studies, community forums/Slack, etc.
• Is there an account health score (and associated early warning system) in place?
• Are there PBR and renewal processes in place?	

Template credit:

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