



Communicating GTM Performance to the Board

CRO & CCO Growth Forum | Navigating Uncertainty with Clarity and Control

May 13, 2025

Why This Conversation Matters Now

... BBC

Fed keeps interest rates unchanged despite Donald Trump pressure

The US central bank has left interest rates unchanged again, despite pressure from President Donald Trump to lower borrowing costs.



CBS News

Powell warns of higher inflation, unemployment risk from tariffs

The Federal Reserve held interest rates steady on Wednesday as policymakers assessed the economic impact of President Trump's tariffs.



CNBC

Fed's Kashkari says rising bond yields, falling dollar show investors are moving on from the U.S.

Fed's Kashkari says rising bond yields, falling dollar show investors are moving on from the U.S. ... Minneapolis Federal Reserve President Neel...



Seeking Alpha

The 'Sell America' trade is not over – Bowersock Capital Partners

Despite the recent stock market recovery, the "sell America" trade will likely continue – now could be a reasonable time for investors to...



CROs must be both operators (drive results) and translators (explain them to the board) – even more so during periods of uncertainty

Goal for Today

Tactics to manage GTM levers and communicate outcomes clearly, credibly, and confidently

Introductions

1. Name, Role & Company

2. Location

3. Icebreaker Options

- a) How is the current macro environment affecting your business today?
- b) One word to describe your last board meeting?
- c) One part of your morning routine that you never skip?

In engaging with the board, a CRO should observe three guiding principles to inspire confidence with their constituents





01 | CLARITY

Of the narrative by framing GTM storylines in plain terms, coherently



How have you had success structuring your board narrative?

OUTCOMES, SHORTFALLS & MITIGATIONS

The business results delivered by GTM efforts, both positive & negative. If negative, highlight mitigation plans.

COMPANY-WIDE METRICS

Top-line indicators (e.g., ARR, NRR, CAC payback) that align GTM performance with overall business health.

MUST-WIN BIG DEALS

High-impact, late-stage opportunities that are critical to near-term targets; what's being done to win, risks & mitigations.

LEADING INDICATORS

Forward-looking metrics (e.g., pipeline coverage, sales velocity, demo-to-close rate) that signal future performance trends.

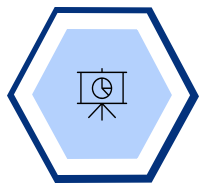
STRATEGIC INITIATIVES

Deliberate, high-impact GTM programs (e.g., segment expansion, new pricing model) designed to drive long-term business goals.

VOICE OF CUSTOMER

Insights gathered from customer feedback and sales interactions that reveal market sentiment and validate GTM decisions.





02 | CREDIBILITY

Through data & metrics presented consistently with explainable trends



What components from your GTM scorecard are highest-ROI?

Illustrative example with randomized data¹:

	PRIOR QTR			THIS QTR			NEXT QTR			YEAR		
	ACTUAL	PLAN	DELTA	ACTUAL	PLAN	DELTA	FOCAST	PLAN	DELTA	FOCAST	PLAN	DELTA
Ending ARR <small>BOP ARR = prior qtr ARR</small>	10.5	10.3	2%	14.1	15.0	(6%)	18.9	\$20.0	(6%)	18.9	\$20.0	(6%)
Net New ARR <small>Gross New ARR - Gross Churn</small>	2.2	2.0	10%	3.6	4.7	(23%)	4.8	5.0	(4%)	11.0	\$12.1	(9%)
YoY ARR Growth <small>(BOP ARR - prior year BOP ARR) / prior year BOP ARR</small>	115%	110%	5 ppts	95%	105%	10 ppts	90%	93%	3 ppts	97%	103%	6 ppts
Net Dollar Retention <small>(BOP ARR - prior qtr ARR) / prior qtr ARR</small>	120%	115%	5 ppts	120%	115%	5 ppts	115%	115%	0 ppts	119%	115%	4 ppts
Net Magic Number <small>Net new ARR / prior quarter S&M FTE</small>	0.5x	0.8x	(38%)	0.4x	0.9x	(56%)	0.8x	1.0x	(20%)	0.6x	1.0x	(40%)
Net New ARR per S&M FTE <small>Annualized net new ARR / average S&M FTEs</small>	\$125K	\$140K	(11%)	\$135K	\$150K	(10%)	\$150K	\$155K	(3%)	\$140K	\$151K	(7%)
LTV:CAC Ratio <small>LTV / CAC</small>	2.9x	3.5x	(17%)	3.1x	4.0x	(23%)	3.5x	4.5x	(22%)	3.2x	4.1x	(22%)

(\$ in M), except where noted												
ARR Funnel	CY2021				CY2022				CY2023			
	Q1A	Q2A	Q3A	Q4A	Q1A	Q2A	Q3A	Q4A	Q1A	Q2A	Q3A	Q4A
Beginning ARR	\$0.6	\$0.8	\$1.2	\$1.6	\$2.1	\$2.7	\$3.6	\$4.5	\$5.6	\$6.6	\$8.5	\$10.1
New Logo	\$0.3	\$0.5	\$0.3	\$0.5	\$0.6	\$1.0	\$1.0	\$1.0	\$1.1	\$1.7	\$1.6	\$2.3
Expansion	\$0.0	\$0.0	\$0.1	\$0.1	\$0.1	\$0.1	\$0.2	\$0.2	\$0.1	\$0.4	\$0.3	\$0.3
Gross New	\$0.3	\$0.5	\$0.4	\$0.6	\$0.7	\$1.1	\$1.1	\$1.2	\$1.3	\$2.1	\$1.9	\$2.6
Downsell	(\$0.1)	(\$0.1)	(\$0.1)	(\$0.1)	(\$0.1)	(\$0.1)	(\$0.1)	(\$0.1)	(\$0.1)	(\$0.1)	(\$0.1)	(\$0.1)
Logo Churn	(\$0.0)	(\$0.0)	\$0.0	(\$0.0)	(\$0.1)	(\$0.1)	(\$0.2)	(\$0.1)	(\$0.2)	(\$0.3)	(\$0.3)	(\$0.3)
Ending ARR	\$0.8	\$1.2	\$1.8	\$2.1	\$2.7	\$3.6	\$4.5	\$5.6	\$6.6	\$8.5	\$10.1	\$12.4
Net New ARR	\$0.2	\$0.4	\$0.4	\$0.5	\$0.6	\$0.9	\$0.9	\$1.1	\$1.0	\$1.9	\$1.6	\$2.3
% Y/Y Growth												
New Logo Y/Y Growth					116%	117%	108%	114%	92%	72%	64%	133%
Expansion Y/Y Growth					196%	723%	71%	44%	59%	377%	85%	72%
Gross New Y/Y Growth					124%	111%	161%	39%	88%	96%	87%	123%
Ending Y/Y Growth					219%	191%	177%	161%	145%	136%	124%	123%
Net New Y/Y Growth					132%	132%	135%	110%	84%	107%	76%	116%
% Q/Q Growth												
New Logo Q/Q Growth					69%	(25%)	38%	24%	69%	(2%)	3%	12%
Expansion Q/Q Growth					(63%)	717%	39%	(10%)	4%	69%	18%	(21%)
Gross New Q/Q Growth					55%	(7%)	38%	13%	60%	5%	5%	6%
Ending Q/Q Growth					47%	31%	32%	26%	34%	25%	24%	18%
Net New Q/Q Growth					68%	(4%)	35%	7%	68%	(4%)	22%	(6%)
Churn %												
Gross Churn, Qtrly					9%	6%	3%	4%	5%	5%	6%	2%
Annualized Gross Churn					34%	26%	14%	18%	20%	19%	24%	8%
Annualized Gross Retention					66%	74%	86%	82%	80%	81%	76%	92%
Net Churn, Qtrly					4%	5%	(3%)	(2%)	1%	2%	2%	(2%)
Annualized Net Churn					18%	22%	(12%)	(10%)	5%	8%	8%	(6%)
Annualized Net Retention					82%	78%	112%	110%	95%	92%	92%	106%
% of Total												
New Logo % Gross New ARR					90%	98%	79%	70%	87%	91%	86%	84%
Expansion % Gross New ARR					10%	2%	21%	21%	13%	9%	14%	16%
Downsell % Gross Churn					81%	74%	100%	61%	42%	33%	21%	48%
Logo Churn % Gross Churn					19%	26%	0%	39%	58%	67%	79%	52%

1

GTM Scorecard as Anchor

Pipeline, conversion, productivity

2

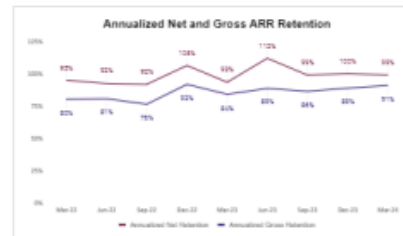
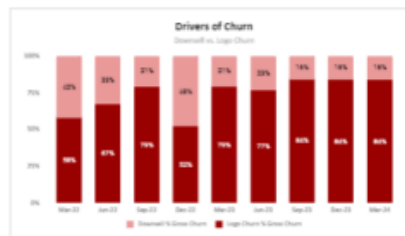
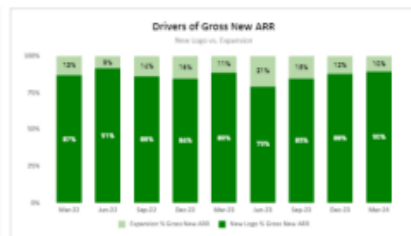
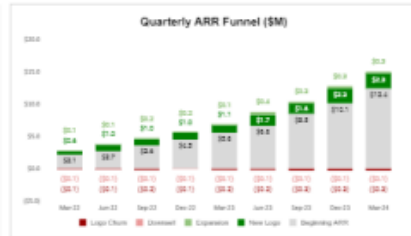
Establish Dimensions

Normalize across time; important segments

3

Highlight (Future) Risks

Using leading indicators, ID & subscribe BoD to dark spots



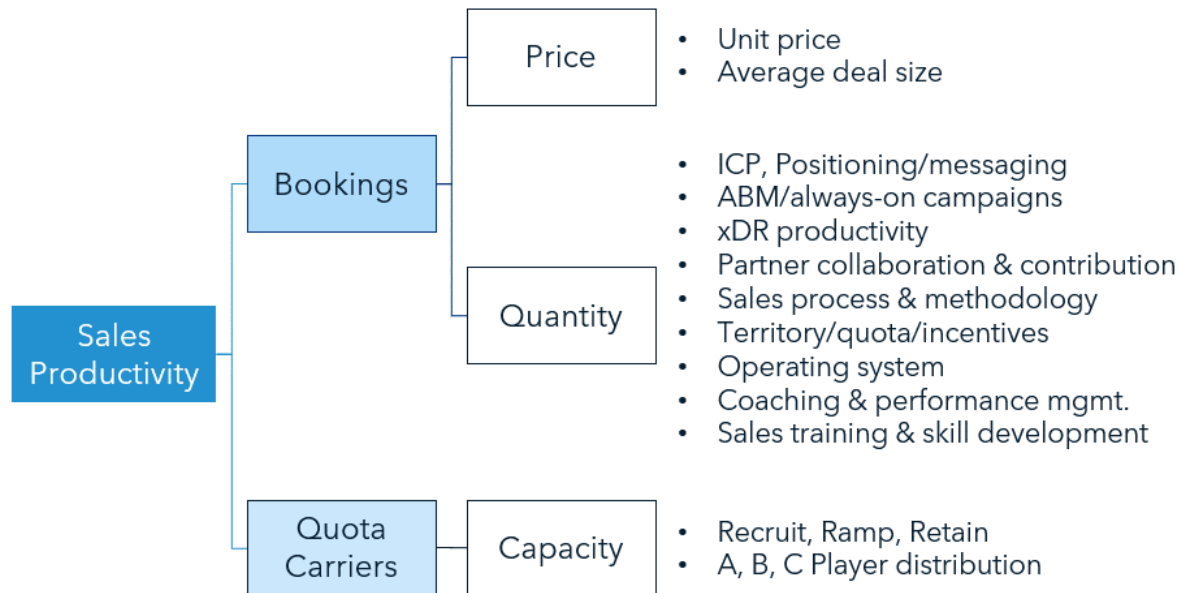


03 | COMMAND

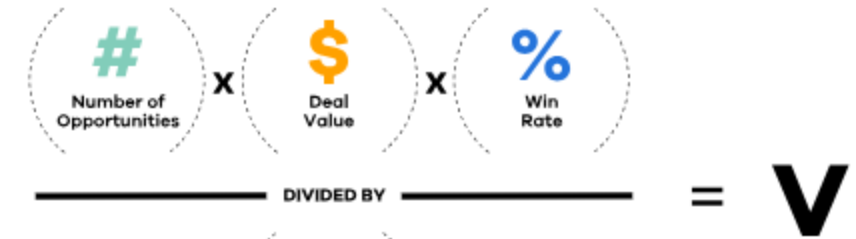
Of levers, by demonstrating control of underlying factors; mgmt. agility



What frameworks or tactics do you use to inspire confidence with your board?



Step 1



Step 2



Analyze by:

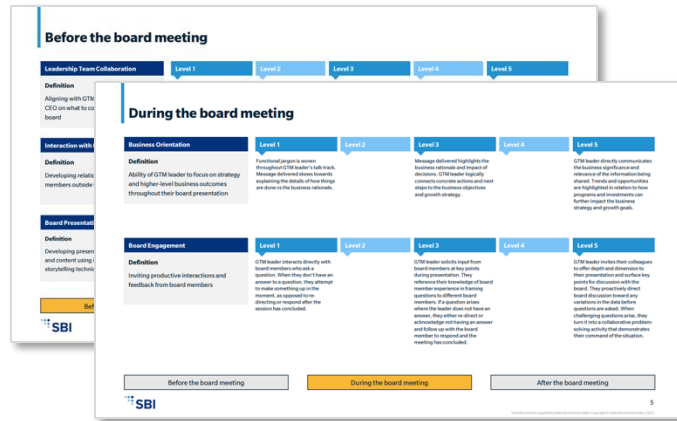
- Geography
- Customer segment
- Routes to market
- Product

➤ **Share proactive moves:** resourcing, motion design, quota strategy

➤ **Include scenario thinking:** how you'll adjust as conditions change

➤ **Quantify impact:** e.g., 'Ramp time cut by 30 days = +15% productivity'

Parting Thoughts & Assets for You



Board Reporting Maturity Model



Deliver Presentations That Get Boardroom Results



Board Q&A Quick Reference Guide



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Appendix

