

# FY26 OKR Draft — Full GTM

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**Platform:** Salesforce + HubSpot | **Type:** Strategic OKR Planning | **Prepared by:** RevPal OpsPal

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## Executive Summary

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The client enters FY26 with strong bookings momentum and a maturing operational foundation. The FY26 Territory Rollout deployed 50+ territories with 30,000+ accounts assigned, 150+ HubSpot workflows are active (including lead scoring, lifecycle management, and event automation), and campaign attribution infrastructure covers roughly a third of won revenue.

However, structural challenges remain: win rate is below 20%, the median sales cycle exceeds 8 months, MQL generation is under 50 per month despite a 100K+ contact database, and a PO lifecycle stage sync gap prevents HubSpot MQL status from reaching Salesforce. The open renewal base exceeds \$100M and needs proactive health monitoring, and international expansion (low single-digit % of prior-year revenue) requires dedicated operational support.

This OKR set proposes **5 objectives, 20 key results, and 11 initiatives** across the full GTM spectrum.

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## Revenue Snapshot (Key Numbers)

Metric	Value	Source
Prior-Year Total Bookings	\$XX.XM (140+ deals)	Salesforce
Prior-Year New Business	\$XX.XM (130+ deals, ~88% of total)	Salesforce
Current YTD Bookings	\$XX.XM (50+ deals, through Q1)	Salesforce
YTD Annualized Pace	~40% YoY growth	Derived
Open Pipeline (all)	\$XXX.XM (1,500+ opps)	Salesforce
FY-Closing Pipeline	\$XXX.XM (950+ opps)	Salesforce
Late-Stage Pipeline	\$XX.XM (160+ opps)	Salesforce
Open Renewal Pipeline	\$XXX.XM (650+ opps)	Salesforce
Pipeline Coverage	6x+	Derived
Win Rate (Prior Year)	<20%	Salesforce
Avg Deal Size	\$200K+	Salesforce
Median Sales Cycle	250+ days	Salesforce
Total Accounts	40,000+	Salesforce
Active Territories	50+ (FY26 model)	Salesforce
International Pipeline	\$XX.XM (40+ opps)	Salesforce
Marketing-Attributed Won	~35% of prior-year bookings	Salesforce
Active Campaigns	480+	Salesforce
HubSpot Contacts	110K+	HubSpot
Current MQLs	~1,500	HubSpot
MQL Generation Rate	<50/month (current year YTD)	HubSpot
Active HubSpot Workflows	150+ (of 260+ total)	HubSpot

SF-HS Contact Sync Rate	96%+	HubSpot
SF-HS Deal Sync Rate	99%+	HubSpot

## Objectives and Key Results

### OBJ-001: Accelerate net-new revenue growth while improving deal economics

Owner: Sales | Theme: Growth

KR	Description	Baseline	Conservative	Base	Aggressive	Unit	Weight
KR-001-01	Annual total bookings	Prior-year baseline	+20%	+33%	+60%	\$	35%
KR-001-02	Overall win rate	<20%	Low 20s	Mid 20s	High 20s	%	25%
KR-001-03	Median sales cycle	250+ days	-10%	-20%	-30%	days	20%
KR-001-04	Average deal size	\$200K+	+5%	+12%	+25%	\$	20%

Confidence Bands (P10/P50/P90) provided for each KR with data-backed ranges.

**Benchmark Context:** B2B SaaS at growth stage typically targets 20-30% YoY growth (KeyBanc 2024). The base target represents top-quartile for the stage. Win rate benchmark for enterprise SLG is 20-30%.

#### Initiatives:

- INIT-001: Stage-gate exit criteria and deal qualification framework
- INIT-002: Deal velocity dashboard with stage-aging alerts

### OBJ-002: Build a predictable marketing-to-pipeline engine

Owner: Marketing | Theme: Growth

KR	Description	Baseline	Conservative	Base	Aggressive	Unit	Weight
KR-002-01	Monthly MQL generation	<50/mo	3x	5x	8x	count/mo	35%
KR-002-02	Engaged-to-MQL conversion	~10%	14%	18%	25%	%	25%
KR-002-03	Net-new contacts (annual)	75K+	Maintain	+10%	+30%	count	20%
KR-002-04	Marketing-attributed won revenue	~35%	40%	45%	55%	%	20%

**Confidence Bands (P10/P50/P90)** provided for each KR.

**Benchmark Context:** B2B SaaS enterprise-ACV companies at growth stage typically see 30-50% of pipeline from marketing (OpenView 2024). The baseline is within range but below median. MQL-to-pipeline conversion benchmarks are 20-35%.

**Note on KR-002-04:** Current-year YTD attributed share is significantly above prior year. This likely reflects improved campaign tracking maturity rather than a fundamental shift in marketing contribution. The prior-year baseline is used for target-setting as the more conservative reference.

**Initiatives:**

- INIT-003: Optimize existing nurture workflows and expand engagement-to-MQL automation
- INIT-004: Enhance campaign attribution model with automated conversion tracking

## OBJ-003: Strengthen sales operations foundation to support scalable territory management

**Owner:** RevOps | **Theme:** Efficiency

KR	Description	Baseline	Conservative	Base	Aggressive	Unit	Weight
KR-003-01	Max accounts per rep	8,000+	4,500	3,000	2,000	count	30%
KR-003-02	Null-amount open opps	~100	10	0	0	count	20%
KR-003-03	Pipeline created (annual)	Prior-year baseline	-5%	+5%	+25%	\$	30%
KR-003-04	Opps in legacy stages	<10	3	0	0	count	20%

**Confidence Bands (P10/P50/P90)** provided for each KR.

**Benchmark Context:** Enterprise SLG territory models typically target 200-500 accounts per AE for active coverage. The current maximum likely reflects unassigned queue accounts. The FY26 territory model is active with 50+ territories and 30,000+ accounts assigned.

**Initiatives:**

- INIT-005: Territory owner rebalancing and assignment rule optimization
- INIT-006: Fix quote-to-amount sync and deploy pipeline hygiene automation

## OBJ-004: Establish repeatable international revenue engine

**Owner:** Sales | **Theme:** Expansion

KR	Description	Baseline	Conservative	Base	Aggressive	Unit	Weight
KR-004-01	International bookings	Low single-digit \$M	2.5x	4x	6x	\$	35%
KR-004-02	International pipeline	\$XX.XM	+25%	+65%	+130%	\$	30%
KR-004-03	Active international markets	2	3	5	8	count	15%
KR-004-04	Intl segmentation deployed	30%	75%	100%	100%	%	20%

**Confidence Bands (P10/P50/P90)** provided for each KR.

**Benchmark Context:** International expansion for US-based vertical SaaS companies typically takes 2-3 years to achieve 10-15% of domestic revenue. The base target represents ~12.5% of the domestic target, which is ambitious but supported by existing pipeline. Key international territories already exist in the FY26 model; additional regions remain to be built.

**Initiatives:**

- INIT-007: International segmentation framework deployment (SF + HS)
- INIT-008: Dedicated international AE coverage for priority markets

## OBJ-005: Achieve platform reliability and full-stack automation maturity

**Owner:** RevOps | **Theme:** Enablement

KR	Description	Baseline	Conservative	Base	Aggressive	Unit	Weight
KR-005-01	Active HubSpot workflows	150+	+8%	+18%	+37%	count	25%
KR-005-02	SF-HS contact sync rate	96%+	97.5%	98%	99%	%	25%
KR-005-03	Renewal monitoring coverage	0%	80%	100%	100%	%	25%
KR-005-04	Monthly email campaigns	Event-driven	8	12	20	count/mo	25%

**Confidence Bands (P10/P50/P90)** provided for each KR.

**Benchmark Context:** Mature B2B SaaS operations typically run 30-50 active automation workflows (HubSpot 2024 benchmarks). The client already exceeds typical benchmarks but utilization suggests room for consolidation and optimization. SF-HS sync accuracy above 95% is standard; the lifecycle stage sync gap (P0) undermines funnel visibility.

**Initiatives:**

- INIT-009: Resolve P0 lifecycle stage sync gap and optimize workflow portfolio
- INIT-010: Renewal health monitoring dashboard and early warning system
- INIT-011: Regular marketing email cadence with audience segmentation

## Baseline Evidence Quality Assessment

Quality Level	Count	Coverage
Live Platform Data (Salesforce)	12	Revenue, pipeline, territory, attribution KR's
Live Platform Data (HubSpot)	5	MQL, engagement, workflow, sync KR's
Derived (multi-source)	3	International segmentation, renewal coverage, email cadence
Manual / No Baseline	0	None

**100% of key results have data-backed baselines.** The 3 derived baselines are confirmed via cross-referencing multiple sources including the Territory2 model, automation audit, and workflow analysis.

## Known Platform Issues Affecting OKRs

Issue	Severity	Affects	Status
HubSpot lifecycle stage not syncing to SF	P0	MQL visibility, sync rate	Unresolved
Quote-to-Opportunity Amount sync gap	P1	Pipeline data quality	Documented, fix identified
Attribution flows in Draft status	P2	Marketing attribution coverage	Built, not activated

# Initiative Priority Shortlist

Rank	Initiative	Impact	Effort	Rationale
1	INIT-009: Resolve P0 lifecycle sync gap + optimize workflows	High	Medium	The PO sync gap directly blocks MQL visibility in Salesforce. Must fix before scaling MQL generation.
2	INIT-003: Optimize nurture workflows for MQL throughput	High	Medium	Low MQL volume from large database is the single largest funnel constraint. Workflows exist but scoring thresholds and nurture tracks need tuning.
3	INIT-005: Territory owner rebalancing	High	Medium	Territory model is active but owner concentration needs resolution. Building on completed FY26 rollout.
4	INIT-004: Activate attribution flows + conversion tracking	High	Medium	Attribution infrastructure exists but automation is in Draft. Activating adds automated influence tracking.

5	INIT-007: International segmentation framework	High	Medium	Mapping files exist, key territories active. Completing additional regions unlocks international pipeline.
6	INIT-010: Renewal health monitoring	High	Medium	Large renewal base has zero automated health scoring.

**Cut Line:** Initiatives 7-11 are important enablers that benefit from the top 6 being in progress. INIT-006 (Amount sync fix) has a documented solution path and can be executed quickly. INIT-008 (international AEs) is a hiring decision. INIT-011 (email cadence) builds on INIT-003 nurture work.

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## Items Requiring Confirmation

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1. **Actual ARR figure:** Estimated from open renewal pipeline. Finance confirmation would improve accuracy.
  2. **Company stage classification:** Classified as "growth" based on renewal base and account volume. Confirm for benchmarking purposes.
  3. **YTD attribution surge:** Marketing-attributed won revenue jumped significantly from prior year. Confirm whether this reflects genuine attribution improvement or tracking process change.
  4. **Account owner concentration:** Maximum accounts under a single owner may represent a queue or admin account rather than a territory.
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# Appendix: Data Sources

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## Platform Queries

All key result baselines are sourced from live Salesforce and HubSpot API queries executed at the time of OKR generation. Each KR includes:

- **Salesforce KRs (12):** SOQL queries against Opportunity, Account, Contact, and Campaign objects with explicit date filters, close status filters, and amount thresholds.
- **HubSpot KRs (5):** CRM Search API and Workflow API queries with lifecycle stage filters and creation date boundaries.
- **Derived KRs (3):** Cross-referenced from multiple platform sources including Territory2 configuration, automation audit artifacts, and workflow analysis.

## Evidence Standards

Every baseline value in this OKR set links to a specific API query or documented artifact. The Data Dictionary (available in the full report) includes:

- Exact SOQL/API queries used for each KR baseline
- Field-level population rates for attribution fields
- HubSpot lifecycle stage ID mappings
- Cross-references to operational runbooks and audit artifacts

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*Generated by OKR Strategy Orchestrator | Data pulled from Salesforce and HubSpot Prior work artifacts consulted: Operational Runbook, Automation Audit, Risk Assessment, Territory Rollout deliverables*