Cortado Group

Stop the reporting theater.
Build a commercial engine you can trust.

Executive Snapshot

The Problem

In most portcos, GTM functions operate in silos and Finance is left to stitch the story together. CRM data is incomplete. Forecasts are unreliable. Sales, Marketing, and Product all produce metrics, but none of them reconcile with the board model. Finance ends up rebuilding CAC models, cross-checking bookings, and defending projections that no one in the GTM engine truly owns.

PEGs underwrite a deal assuming conversion rates, CAC payback, and pipeline velocity. But once inside the business, those metrics aren't traceable, or worse, they don't exist. Teams are moving fast, but leadership can't explain what's working or why. Forecasts miss. The Revenue Plan unravels. And the conversation becomes political, not productive.

Our Solution

We build the infrastructure that connects execution to financial outcomes, across Sales, Marketing, Product, and Finance. It starts with a system diagnostic to uncover misalignment: process breakdowns, conflicting definitions, and reporting gaps. Then we rebuild the GTM operating model: pipeline stages, CRM architecture, forecast methodology, and cross-functional KPIs tied directly to the board's revenue model.

Finally, we operationalize the system through training, cadence, and reporting. Forecasts become defendable. GTM metrics become explainable. CRM becomes a source of truth. The PEG's Revenue Plan becomes executable, not theoretical. And Finance stops playing translator between functions.

Your Impact

This SKU turns fragmented reporting into a unified commercial system that supports the full Revenue Plan lifecycle.

Sales forecasts align with bookings. CAC is traceable and benchmarked. Marketing attribution is real. Product feedback loops are built in. The CEO manages from one dashboard. The CFO can defend it. And the PEG trusts it, because it's now tied to a system that reflects actual behavior, not best-case assumptions.

This isn't just operational cleanup. It's a Revenue Plan validation layer embedded in daily execution, one that connects the metrics that matter with the decisions that drive value.

Aligning to the PortCo Lifecycle

Every PortCo goes through predictable stages. RevOps begins by fixing data and alignment, then institutionalizes governance and builds buyer-ready metrics for diligence.

REVOPS EXECUTION SYSTEM	Assess data integrity and GTM-finance reconciliation	Establish single source of truth	Maintain reporting governance	Enhance scalable metrics	Critical for due diligence proof
	Day 0	0-12 Month	Year 1-3	Year 3-5	Year 5+
PHASE	**Commercial Diligence**	**Early Investment**	**Investment**	**Growth**	**Exit**
TRIGGER	Does the market story hold up?	We need proof the growth plan is working.	We're off-plan and need to fix execution.	We need to scale without breaking	We need a clean, defendable GTM story for buyers.
STAGE EMPHASIS	Market validation, Early GTM fit check, Board confidence pre-close	Early traction, Board alignment, Operating proof	Pipeline rebuild, Operating rhythm reset, Mid-hold GTM realignment	Infrastructure to scale, Comp/territory redesign, Margin defense	Defensible GTM story, Predictable revenue engine, Buyer confidence

Low   High
Need & Level of Effort

Why This Matters Now
These are more than execution issues—they're signals of systemic risk:

The PEG's Financial Model Doesn't Match the Company's GTM Reality
CAC, conversion, and pipeline assumptions fall apart under scrutiny—because GTM systems weren't built to support them.

Most Portcos Can't Explain What's Working
Growth exists, but it isn't repeatable. Sales is founder-led, marketing is light, and product is reactive. No one can connect performance to process—or tie it back to modeled returns.

CFOs Inherit GTM Chaos and Spend Months Translating It
Finance becomes the de facto GTM auditor—building Excel models to explain what CRM can't. They're forced to manually reconcile revenue plan assumptions with unreliable data.

PEGs Start Requesting Data Before the Org Is Ready
MBRs, board forecasts, unit economics. The asks come fast—but the systems to support them don't exist. Reports become performative.

When Forecasts Miss, No One Can Explain Why
Sales doesn't own the number. Marketing can't explain conversion. Product is disconnected. And Finance gets stuck patching the story.

Our Solution

What We Do

1 **Diagnose Reporting & Process Gaps**
- Analyze how GTM data flows across Sales, Marketing, Product, and Finance
- Identify breakdowns in CRM logic, funnel design, forecasting, and reporting
- Map PEG and CFO reporting needs against current GTM infrastructure and revenue model

2 **Redesign the Operating Model**
- Rebuild pipeline stages, SLAs, and deal definitions
- Standardize ownership across GTM functions (lead → quote → renewal)
- Align CRM, MAP, and product systems to CAC, payback, and LTV tracking

3 **Build Forecasting and Reporting Infrastructure**
- Install dashboards by layer: rep, manager, exec, board
- Enable forecast roll-ups and scenario modeling
- Connect GTM metrics to PEG value drivers: CAC, margin, retention, coverage
- Create a unified system of record to inspect the Revenue Plan against actuals

4 **Operationalize and Drive Adoption**
- Wire reporting into the operating cadence (forecast calls, MBRs, board prep)
- Train leaders and reps to manage to shared KPIs
- Enforce adoption through governance, inspection, and system usage metrics

How We Deliver

ACTIVATION
Align PEG, portco leadership, and GTM functions on reporting needs.

Audit CRM, pipeline structure, and financial model alignment. Define gaps and success metrics.

TRACTION
Redesign GTM operating model, forecast logic, and data architecture.

Build dashboards, playbooks, and cross-functional KPIs. Validate through live reporting cycles.

ENABLEMENT
Train functional teams, activate reporting cadence, & install governance.

Equip CFO, CRO, and PEG with one source of truth for execution-to-outcome visibility.

BOARD-READY NUMBERS →

Case Study / Proof Point

Company/Segment   PE-backed digital services firm

Challenge   Sales execution was ad hoc. CRM hygiene was low. Forecasts missed. Win rates were below 3%. Managers were reactive, and reps operated in silos. Revenue plan assumptions were off-track.

What We Did   We implemented an Opportunity Management process, launched deal inspection cadences, built rep and manager dashboards, and trained frontline leaders with targeted talk tracks and onboarding tools.

One Source of Truth

Click or scan to schedule your free assessment to connect your GTM to Finance and forecasts defendable.