Sales Execution Sprint

Cortado Group

From forecast fiction
to frontline discipline.

Executive Snapshot

The Problem
Most portcos don't fail from bad strategy, they fail in execution. Sales has a defined process, but reps often skip steps, mis-stage deals, and lack a shared definition of "qualified." Forecasts turn into fiction, CRM becomes noise, and coaching stays reactive. As frontline behavior drifts from modeled assumptions, forecast accuracy collapses, bookings slip, and decision makers are forced to steer from unreliable sales data.

Our Solution
We embed the systems, cadences, and tools that bring frontline sales execution under control. This isn't just about a better playbook, it's about enforcing operational discipline. We define buyer-aligned stages, launch pipeline and deal desk reviews, enforce CRM hygiene, and train managers to coach, not chase. Sales stops relying on instinct and starts executing in line with the Revenue Plan.

Your Impact

In 6–8 weeks, sales becomes a system, not a story.

Reps follow a consistent, trackable sales process	Pipeline quality and CRM hygiene improve significantly	Forecasts tighten with real-time stage visibility	Managers spend less time chasing and more time coaching	New reps ramp faster with structured onboarding and playbooks

The execution engine begins to mirror the Revenue Plan, making future growth assumptions real, not theoretical

3-5x Win Rate	**40-60**% Forecast Accuracy	**+90**% CRM Hygiene Compliance	**4–6** weeks Rep Ramp Time

Aligning to the PortCo Lifecycle

Every PortCo goes through predictable stages. Sales execution discipline established early drives consistency at scale, while later stages focus on reinforcement and readiness.

Low ———— High
Need & Level of Effort

SALES EXECUTION SPRINT	Evaluate process maturity and deal control	Install disciplined pipeline and forecast cadence	Reinforce consistency across team	Tune for scale gaps	Adjust for diligence readiness
	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

Why This Matters Now Execution without accountability is theater.

Forecasts Miss, Repeatedly.
Pipeline looks big but closes small. Deals stall. Close dates are guesswork.

Sales Process Exists, But Isn't Followed.
Stages are skipped. Exit criteria are ignored. Reps sell their own way.

CRM Is a Liability, Not a System.
Data is stale, backfilled, or missing. Nobody trusts what's in the system.

Managers Aren't Managing, They're Firefighting.
1:1s and pipeline reviews lack structure. No real coaching or inspection.

Reps Churn Before They Ramp.
Onboarding is inconsistent. High performers leave. Under-performers linger.

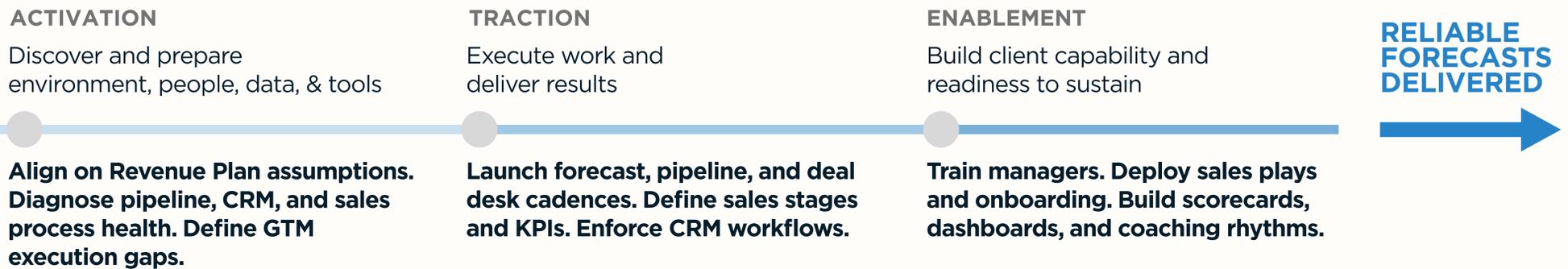If you're seeing even two of these, it's not a rep issue, it's a system problem. And it's fixable.

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Our Solution

What We Do

1 Stand Up the Operating Rhythm
- Opportunity Management Framework (with exit criteria + KPIs)
- Weekly Deal Desk, Forecast Calls, and Pipeline Reviews
- CRM workflows for stage movement, tasking, and accountability
- Forecast accuracy becomes a discipline

2 Coach the Coaches
- Manager training on 1:1s, pipeline discipline, and deal inspection
- Forecast accuracy tracking and intervention planning
- Scorecards and meeting templates that drive rigor
- Increases manager leverage and reinforces team-wide accountability

3 Equip the Team to Execute
- Sales plays and talk tracks by motion and stage
- Structured onboarding aligned to execution system
- Shadowing and call review libraries
- Execution system becomes the training ground for Revenue Plan attainment

4 Build the Reporting & Reinforcement Layer
- CRM configuration and hygiene dashboards
- Rep and manager-level scorecards
- Operating calendar for accountability and cadence
- Enables early risk detection and plan pacing reviews

This sprint builds on foundational work in ICP, pricing, and targeting. It is not designed to operate in a vacuum.

How We Deliver

ACTIVATION
Discover and prepare environment, people, data, & tools

TRACTION
Execute work and deliver results

ENABLEMENT
Build client capability and readiness to sustain

RELIABLE FORECASTS DELIVERED

Align on Revenue Plan assumptions. Diagnose pipeline, CRM, and sales process health. Define GTM execution gaps.

Launch forecast, pipeline, and deal desk cadences. Define sales stages and KPIs. Enforce CRM workflows.

Train managers. Deploy sales plays and onboarding. Build scorecards, dashboards, and coaching rhythms.

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.

Results Within 60 Days

+5% Win rate improvement from 3% → 8%

52% Forecast accuracy improved

90% CRM hygiene compliance greater then

Tighten the Forecast

Click or scan to schedule your free assessment to improve accuracy and avoid last-minute surprises.