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THE COMPANION WORKBOOK

The Founder's Marketing Workbook

Thirteen decision tools to use alongside Seed to Series B: Marketing Decisions Without the Expensive Mistakes.

Tom Berger

One tool per chapter. Built to be filled in.

bergercmo.ai/workbook

HOW TO USE THIS WORKBOOK

A tool for every decision.

This workbook turns the thirteen core frameworks from the book into worksheets you can actually fill in. Each page maps to one chapter. Work through a page after you finish the matching chapter, or use the whole workbook as a standing diagnostic when a marketing decision is in front of you.

- Read the chapter first.
  Each tool assumes the context the chapter builds. The worksheet is the decision, not the explanation.
- Fill it in directly.
  This is a fillable PDF. Click any field and type, then save. Or print it and write by hand.
- Be honest, not aspirational.
  The value of every tool here is in answering as your company actually is today, not where you want it to be.
- Revisit by stage.
  Stage changes the right answer. Come back to these pages at each new round and at each new quarter.

A NOTE ON ACCOUNTABILITY

Most of these tools point at the same idea: marketing is accountable for a sales-accepted meeting, not a download. If a worksheet feels uncomfortable to fill in, that discomfort is the signal. It is showing you exactly where the next decision lives.

PART ONE

Before You Spend a Dollar

CHAPTER 1

The Stage Diagnostic Checklist

What Stage Are You Actually In?

> Before deciding on any marketing investment, whether that is a hire, a channel, a campaign, or a tool, answer these five questions honestly. Your actual stage is the last question you answered yes to. Start your marketing decisions there, not where you wish you were.

1. Can I name the specific type of buyer who has purchased without being sold to directly by me? ☐ Yes ☐ No

If no: you are in Stage 2 or earlier.

2. Do I have at least three customers who expanded their contract without being asked? ☐ Yes ☐ No

If no: you have not confirmed Product-Market Fit.

3. Can I describe the primary acquisition channel that brought my last five customers, and would I bet that it works again? ☐ Yes ☐ No

If no: you are still finding GTM Fit.

4. Is my CAC measurable, and is it improving quarter over quarter? ☐ Yes ☐ No

If no: you are not yet in Stage 4.

5. Does my marketing run without my direct involvement for more than two weeks? ☐ Yes ☐ No

If no: you have not yet built a scalable motion.

My actual stage (the last question I answered yes to):

The one marketing decision this stage tells me NOT to make right now:

CHAPTER 2

The Buying Room Map

Who Are You Really Building For?

> Your ICP describes your Champion. The Buying Room Map shows you who else is in the room where your deals actually get decided. Every B2B deal has these four roles, even when they are not four different people. For each role, name the person and what your marketing needs to give them.

Champion

Wants you to win. Feels the pain. Needs language and evidence to sell you internally.

Who is this, and what does my marketing need to give them?

Economic Buyer

Controls the budget. Evaluates cost, risk, and payback, not features.

Who is this, and what does my marketing need to give them?

Technical Evaluator

Assesses fit, integration, and security. Wants no problem to clean up later.

Who is this, and what does my marketing need to give them?

Process Owner

Controls access and the approval workflow. Owns the timeline, not the decision.

Who is this, and what does my marketing need to give them?

Where do my last three deals stall? Which role did my marketing fail to equip?

CHAPTER 3

The Market Reality Test

The Market Reality Check

> Market size tells you how much revenue exists. Market type tells you what you have to do to unlock it. Pick the one type that best describes the market you are actually in, then answer the why now question. Running the wrong marketing strategy for your type burns runway the same way being five years early does.

- [ ] **Existing Market**
  Buyers understand the problem and are comparing alternatives. Job: competitive displacement.
- [ ] **Resegmented Market**
  You carve out a segment the incumbent serves poorly. Job: niche dominance.
- [ ] **Category Creation**
  Buyers do not yet see this as a problem. Job: education, not acquisition.
- [ ] **New Market Adjacent to Existing Behavior**
  Problem is recognized; solution category is not. Buyers cope with spreadsheets or manual work.

Why now? What changed in the world that makes buyers ready for this today, not two years ago?

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PART TWO

The Decisions That Define Your GTM

CHAPTER 4

The Positioning Stack

Positioning Before Promotion

> Positioning is not a sentence. It is five decisions made in sequence. Skipping any one produces a statement that sounds plausible and fails in practice. Work through all five in order. Write the positioning sentence last, only after Decision 5.

Decision 1. Competitive Alternatives: What does my buyer actually do today if my product does not exist? (Often a spreadsheet, an intern, or nothing.)

Decision 2. Differentiated Attributes: Where do I genuinely outperform that alternative? (Must be true, relevant, and unmatchable by alternatives.)

Decision 3. Value for the Right Buyer: What concrete, measurable outcome do those attributes produce for a specific buyer?

Decision 4. Target Market Characteristics: Which buyers value those attributes most acutely, have the budget, and are ready to act?

Decision 5. Market Category: Given decisions 1-4, which category should I compete in? This sets buyer expectations.

Now write the positioning sentence (last):

Test it: which customer will I run this by, and what will tell me it landed (do they repeat it back in their own words)?

CHAPTER 5

The Channel-ACV Matrix

Pick One Channel and Win It

> Two tiers, not five. Your primary channel gets 70 to 80 percent of budget and attention; it is where your ACV can afford to play, your buyer's behavior matches, and you already have evidence. The structured test gets the remaining 20 to 30 percent with a specific hypothesis and a defined kill threshold.

Primary channel (gets 70 to 80% of budget):

Does my ACV support this channel's fully-loaded cost? (Filter 1)

Does my buyer's behavior match this channel? (Filter 2)

Do I have enough to WIN it, not just appear in it? (Filter 3)

Structured test channel (gets 20 to 30% of budget):

Test hypothesis: what specific question am I trying to answer?

Kill threshold:

If this metric (X)...

does not happen by this date (Y), I stop.

CHAPTER 6

The Motion Decision Test

PLG vs. Sales-Led: The Decision Founders Get Wrong

> Three inputs. The motion comes out the other side, no philosophy required. Fill in each input and note what it points to. If all three do not point the same way, the inputs that involve the buyer's organization (2 and 3) usually override the wish.

Input 1. Annual Contract Value:

My ACV is $

Below $5K = sales kills economics; above $25K = PLG rarely closes alone

Input 2. Buyer Decision Process: Can a single user experience value, decide to pay, and transact without involving anyone else? (Procurement, IT, or budget approval means PLG cannot close it.)

Input 3. Time to First Value: How long until a new user reaches a meaningful value moment, with no help from my team? (Beyond one working session points away from PLG.)

Motion the three inputs point to (PLG / Sales-Led / Hybrid):

CHAPTER 7

The SAL Accountability System

MQLs Are a Trap

> Stop arguing over what qualifies as a SAL. Define it as a process step: an ICP-fit contact who has agreed to a first meeting and has one on the calendar. When that meeting exists, the SAL exists. This is a joint definition both teams agree to. Track volume weekly, and when a meeting does not move forward, send that rejection back as a feedback loop so you refine the ICP, not the scoring model.

Component 1. The joint lead definition both teams sign off on (an ICP-fit contact with a first meeting booked on the calendar):

Component 2. Weekly tracking:

First meetings scheduled this week:

With contacts at what company types:

Component 3. Rejection feedback loop (a meeting that did not move forward, and the reason the contact was not a fit):

Contact / company	Why the contact was not a fit

Pattern emerging across these rejections, and how I will tighten my ICP:

PART THREE

Building the Team and the Operating System

CHAPTER 8

The First Hire Decision Matrix

The First Marketing Hire

Most founders choose a first hire based on seniority or skill set. The right variable is what the hire needs from above them to succeed. Mark the hire type that matches your stage, then be honest about whether you can provide the oversight it requires. If you cannot provide the strategic layer, that is the gap to solve first.

- [ ] **Generalist Executor**
  Runs multiple channels against a defined strategy. Right when positioning, channel, and ICP are validated. Needs a strategic layer that sets direction.
- [ ] **Channel Specialist**
  Deep in one channel. Right when your primary channel is identified and needs an owner. Wrong before you have found that channel.
- [ ] **Product Marketer**
  Positioning, messaging, buyer language. Right when positioning is unclear. Often the most underrated first hire at Series A.
- [ ] **Marketing Leader (VP/Head)**
  Builds strategy and manages execution. Right only when validated GTM infrastructure warrants a team.

What does this hire need from above them to succeed, and can I provide it consistently? If not, what is my oversight plan?

CHAPTER 9

The Stage Metrics Stack

Metrics That Actually Matter by Stage

> Your dashboard should have three numbers on it, not seventeen. First identify your motion and stage, then commit to the three metrics that match. Reading the metrics for a stage you have not reached only adds noise. Return to the next stack when you get there.

Select your context:

GTM motion (PLG / SLG / Hybrid):

Current stage (Seed / Series A / Series B):

Metric 1 (and the number I am holding it to):

Metric 2 (and the number I am holding it to):

Metric 3 (and the number I am holding it to):

Which metrics am I tracking today that I should remove from the dashboard?

CHAPTER 10

The Reverse Budget Method

Budget Allocation by Stage

> Do not start with last year's spend. Start with the revenue target and work backward. Five steps, run in sequence. Each step's output is the next step's input, so the final budget is a math problem, not a preference.

Step 1. Net new ARR target for the year: $

Step 2. Pipeline required:

Win rate (%):

Pipeline = target / win rate = $

Step 3. SALs required:

Avg deal size: $

Meeting-to-opp rate (%), then SAL volume:

Step 4. Cost to generate those SALs:

SAL cost per channel: $

Budget for SAL generation: $

Step 5. Infrastructure and long-cycle investment (tools/attribution, headcount fully loaded, and brand/long-cycle):

Total marketing budget (program + people + infrastructure): $

CHAPTER 11

The Marketing Operating Cadence

The Marketing Operating System

> Four rhythms keep a marketing function coherent without the founder making every decision. Each has a specific job and none replaces the others. Fill in who owns each meeting, when it runs, and the one decision it exists to make. If marketing cannot run for 90 days without you, you have a dependency, not a function.

Annual: Set the strategic framework

ICP, positioning, primary + test channel, reverse budget, annual SAL target. A four-hour focused session.

Owner	When it runs

Quarterly QBR: Review, adjust, plan 90 days

Did we hit the SAL target? Win rate by channel? Test go/no-go? Presented to full leadership, week two of the quarter.

Owner	When it runs

Monthly review: Catch the drift

Progress against the quarterly plan. Chaired by the marketing lead.

Owner	When it runs

Weekly standup: Execute and remove blockers

30 minutes. What ships, what is blocked, what inbound gets triaged (not auto-prioritized).

Owner	When it runs

PART FOUR

Readiness Checkpoints

CHAPTER 12

The Series A Readiness Scorecard

Series A Readiness: Can You Answer These Six Questions?

> Score yourself honestly on all six. Pass means you meet the criterion with evidence. Partial means you have part of it. Fail means you cannot yet answer. A founder who passes five of six has identified, with precision, exactly where the next dollar of marketing investment should go before scaling.

Q1. Who buys? I can describe my ICP in one paragraph specific enough to disqualify someone, with three reasons they buy that do not apply to adjacent companies.

- [ ] Pass   - [ ] Partial   - [ ] Fail

Q2. Why do they buy? I can state the measurable outcome in one sentence and name three customers who confirmed it unprompted.

- [ ] Pass   - [ ] Partial   - [ ] Fail

Q3. Why you over a competitor? My differentiation fits in one sentence and references what buyers actually give up, not a named vendor.

- [ ] Pass   - [ ] Partial   - [ ] Fail

Q4. Which channel works? I can name the channel, its SAL cost and win rate, held consistent across at least two quarters.

- [ ] Pass   - [ ] Partial   - [ ] Fail

Q5. What CAC is acceptable? I can calculate CAC payback from my primary channel and confirm it is under 12 months.

- [ ] Pass   - [ ] Partial   - [ ] Fail

Q6. What retention exists? My NRR is above 100% and I can explain both the expansions and the churn.

- [ ] Pass   - [ ] Partial   - [ ] Fail

My weakest answer, and where the next dollar of marketing goes because of it:

CHAPTER 13

The Series B Transition Checklist

Series B Readiness: Building the Engine, Passing the Baton

> Chapter 12 asked whether the foundation was strong enough to scale. This checklist asks whether you are ready to scale it through someone else. Check each condition you have genuinely met, then fill the decision map: the baton is handed deliberately, not dropped.

- [ ] Condition 1. The VP has a written mandate with defined success metrics (SAL target, CAC trend, pipeline velocity, brand thesis).
- [ ] Condition 2. I have defined which decisions require my input and which do not.
- [ ] Condition 3. The operating cadence runs without me chairing it (I attend the QBR as a participant).
- [ ] Condition 4. The VP has hired or is hiring the team they need (I am not in the IC hiring loop).
- [ ] Condition 5. I have something more important to do (customers, product, board, leadership recruiting).

Decisions the founder owns

Brand positioning, ICP definition, the annual strategic framework.

Decisions the VP owns

Campaign execution, copy, channel tactics, team management, vendors.

Decisions requiring joint alignment

Budget reallocation above a threshold, new channel investment, any change to the SAL definition.

My step-back staging: what I hand off first, what I hold longest, and the date I stop chairing the weekly standup:

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WORK WITH TOM

You filled in the tools.
Now apply them to your company.

If working through this workbook raised questions you want to pressure-test for your specific company, Tom works with a small number of Series A and B B2B SaaS founders as an embedded Portfolio CMO. He does not take every engagement. He takes the ones where the decisions in this book are the decisions in front of you.

Marketing Audit

Diagnosis only. A clear read on where your go-to-market actually stands against the frameworks in this book.

GTM Sprint

Diagnosis plus a 90-day execution roadmap. The audit, then the plan to act on it.

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