

SaaS agency evaluation brief: completed illustration

Simulated, not a result. Fictional scenario. All figures are planning assumptions; neither this sample nor a completed brief constitutes an engagement with Growth Cab.

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Company and buying motion

Company: fictional US B2B software vendor. Assumed annual contract value: 60,000 USD. Buyers: operations and IT leaders at mid-market firms. Purchase requires a demo, security review and multiple decision makers. The company has paying customers; conversion rates and repeatability have not yet been verified for this exercise.

\$60,000

assumed annual contract value

30

accounts in the review sample

7

stages kept separate, selected to won

4 weeks

proposed review window

Problem to test

The founder handles sales and wants to learn whether a defined account segment has a repeatable reason to engage. The agency is not being asked to solve product retention or supply a guaranteed revenue number.

Sample and exclusions

Start with a proposed 30-account review sample. This is a workflow learning sample, not a statistically powered experiment. Account rules, named roles and evidence must be agreed before selection. Exclude current customers, open opportunities, suppressed contacts and businesses outside the agreed segment. Do not assume public contact information authorizes outreach.

Roles and assets

Client owner: sales lead approves fit, messaging, contact suitability and opportunity acceptance. Provider owner: named operator documents account selection and the proposed workflow. Client sales team retains discovery, qualification decisions and closing. Confirm ownership and exit access for CRM records, domains, research and playbooks in the actual agreement.

Stage definitions

Selected account: fits documented account rules. Approved for outreach: passes a separate review gate. Replied: an incoming human reply, categorized by intent. Booked: calendar invitation created. Attended: meeting actually occurred. Accepted opportunity: client sales owner confirms an agreed problem, fit and next step. Won: signed commercial outcome under the client's CRM rules. Do not substitute any earlier stage for a later one.

Learning window and acceptance

Proposed review: four weeks after the necessary access and approvals are in place. Review completeness of evidence, rejection reasons, handover usability and available response signals. This window does not establish revenue impact or replace a full sales cycle. No target response rate is invented.

Stop and expand conditions

Stop if suppression fails, records cannot be traced or ownership is disputed. Hold expansion if account or role evidence remains unresolved. Consider expanding only after the client accepts the workflow and the observed evidence supports the decision. Document what remains unproven.

Commercial questions still open

Confirm actual fees, service capacity, provider-specific deliverability requirements, internal management time and cancellation terms. Neither this sample nor a completed brief constitutes an engagement with Growth Cab.

Source page: <https://www.growthcab.com/saas-lead-generation-agency>
