

SaaS agency evaluation brief: blank template

Simulated, not a result. Replace every bracketed field with your own verified facts and label assumptions explicitly. Keep private customer information out of any public copy.

Replace bracketed fields with your own verified facts. Mark assumptions explicitly. Do not include private customer information in a public copy.

- **Company and buying motion**

[product, buyer, sales-assisted or self-serve, verified contract-value range]

.....

.....

- **Problem to test**

[specific constraint and evidence]

.....

.....

- **Sample**

[selection rules, review size, reason for that size]

.....

.....

- **Exclusions**

[customers, open deals, suppressions, out-of-scope accounts]

.....

.....

- **Client owner and provider owner**

[names/roles in your private working copy]

.....

.....

- **Approval and asset ownership**

[who approves each step; who retains each account and asset]

.....

.....

- **Stage definitions**

[selected, approved, replied, booked, attended, accepted opportunity, won]

.....

- **Review window**

[start condition, observation period, sales-cycle limitation]

- **Acceptance evidence**

[inspectable records and handover test]

- **Stop conditions**

[specific failures that prevent expansion]

- **Expand conditions**

[evidence and accountable decision maker]

- **Costs and terms**

[fees, tools, internal time, exit terms; unknowns labeled]

- **Unproven assumptions**

[what this exercise cannot establish]

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