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# The January Fast Start Guide for PE-Backed GTM Teams

## How Seven Critical Roles Set the Growth Trajectory in the First 30 Days

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# Why Early January Feels Different in PE-Backed Companies

The period from late December to early January can be deceptive.

→ **Calendars are less crowded.**

Standing meetings pause, external noise drops, and leaders gain rare, uninterrupted time to step back from daily execution.

→ **Inbox pressure decreases.**

Fewer urgent decisions create space to identify performance patterns, rather than just reacting to problems.

→ **Leaders finally have time to reflect.**

This is one of the few periods of the year when leadership can honestly assess whether GTM systems are working or simply creating activity.

For PE-backed teams, this window is not downtime. *It is design time*.

**January is when:**

→ **Roles and expectations harden.**

What leaders reinforce in January becomes how teams interpret ownership, accountability, and growth priorities.

→ **Priorities move from ideas to commitments.**

January determines what actually gets resourced, measured, and inspected.

→ **Execution systems and operating cadence lock in.**

Metrics, reviews, and decision rhythms are either established early or quietly deferred.

→ **Dashboards start telling the truth.**

Early January performance indicates whether last year's investments have led to changed outcomes or merely increased activity.

For PE-backed companies, early January sets the foundation for the year and signals that the window for value creation is already narrowing.

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## If January is wasted, Q2-Q4 becomes recovery mode.

PE-backed companies that use the first 30 days to architect their GTM execution build momentum that compounds throughout the year. Those who rely on motivation and vague goals spend the rest of the year explaining variances.

**The numbers are unforgiving.**
A ~$70M company that improves GTM velocity over 18 months exits very differently than one relying on hustle and heroics.

The gap isn't a strategy. *Its execution discipline was established early.*

## Common Mistakes PE-Backed Teams Make in January:

→ **Easing into January rather than deliberately designing the year.**
Teams assume effort alone will improve results without changing systems.

→ **Run energizing kickoffs without making needed changes.**
Morale improves, but pipeline quality and conversion rates remain unchanged.

→ **Raise targets without fixing GTM mechanics.**
Numbers increase, while win rates, cycle time, and retention rates stay flat.

→ **By March, revenue creation hasn't shifted.**
Early warning signs are ignored.

→ **By June, teams are behind plan.**
Pressure replaces discipline.

→ **By December, leaders explain misses instead of scaling wins.**
The year becomes defensive instead of value-creating.

## How High-Performing Teams Approach January:

⭐ **Align how each role contributes to growth.**
Every function understands its direct impact on revenue and retention.

⭐ **Pair the mindset with specific January actions.**
Expectations are reinforced through behavior, not slogans.

⭐ **Avoid enthusiasm without clear priorities, roles, and cadence.**
Energy is channeled into systems and cadence.

⭐ **Avoid activity without direction.**
Effort focuses on high-leverage GTM work.

⭐ **Sequence change instead of launching everything at once.**
Teams prioritize what will move metrics in the next 90 days.

*A strong mindset must be paired with action. Action without the right mindset can lead to customer churn.*

# Seven GTM Roles Influencing PE-Backed Growth

**The first 30 days set the course for the next 12 months.**

1. PE-Backed CEO
2. CRO or VP of Sales
3. PE Operating Partner
4. Marketing Manager
5. Sales Manager
6. Account Executive/Sales Rep
7. Customer Success Manager

# 1 – PE-Backed CEO

## Owning the GTM System and the Exit Narrative

CEOs do more than oversee GTM. They own how growth is produced and how it is explained to the Board and buyers.

January is the moment to convert prior GTM investments into measurable performance.

### January GTM Mindset

→ **Define the ideal customer profile and focus on profitable growth.**
Exit value is driven by repeatable wins in the right segments, not broad market ambition.

→ **Sales velocity and margin are key drivers of exit value.**
Faster cycles and stronger unit economics compound valuation multiples.

→ **Base growth decisions on data, not optimism.**
Pipeline, conversion, and cycle time must be baselined to guide decisions.

→ **Ensure stability before scaling.**
Expansion only works if retention and customer health are stable.

→ **Pursue growth in measured increments.**
Sequenced improvements reduce execution risk and speed results.

→ **Focus on building scalable systems rather than relying on individual performance.**
Buyers pay for systems that scale, not individual performance.

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*CEO*
## Key January CEO Insight

**January determines whether GTM execution is intentional or reactive for the rest of the year.**

*CEO*
### January GTM Recommendations

| | |
|---|---|
| **Week 1** | · Establish a sales velocity baseline using prior-year actuals to ground growth discussions in facts.<br>· Identify the 1-2 GTM constraints most limiting growth entering Q1. |
| **Week 2** | · Align the executive team on ICP, pipeline, churn definitions, and growth assumptions.<br>· Select no more than three Q1 GTM priorities and assign clear ownership. |
| **Week 3** | · Assign executive sponsors to top revenue accounts to protect retention and expansion.<br>· Schedule proactive Q1 customer touchpoints to surface risk early. |
| **Week 4** | · Refine the Board narrative to explain what changed, what is being fixed, and why now.<br>· Confirm where GTM investments will create leverage without adding headcount. |

# 2 – CRO or VP of Sales

## Turning Growth Strategy Into Math

CROs are responsible for the weekly actions that turn strategy into bookings.

**Key January Insight**

Most revenue plans fail because targets aren't translated into straightforward pipeline math and execution discipline.

*CRO*

### January GTM Mindset

→ **Own the math, not just the number.**
Targets must translate into pipeline volume, win rates, and capacity.

→ **Identify constraints before motivating the team.**
Pushing activity without understanding constraints increases waste.

→ **Optimize processes before increasing headcount.**
Efficiency gains often outperform hiring in both speed and cost.

→ **Align Marketing, Sales, and Customer Success around the ideal customer profile.**
Shared focus improves pipeline quality and retention.

*CRO/VP of Sales*

### January GTM Recommendations

**Week 1**
- Baseline sales velocity using actuals and review win-loss by ICP and sales rep.
- Identify the primary lever constraining bookings entering Q1.

**Week 2**
- Re-qualify pipeline against confirmed ICP and remove weak or misaligned deals.
- Reset pipeline coverage targets using real win rates instead of optimism.

**Week 3**
- Tighten stage exit criteria to improve forecast accuracy and reduce false confidence.
- Address pricing, legal, or approval friction slowing deal progression.

**Week 4**
- Deliver a Board-ready Q1 forecast that separates pipeline risk from execution risk.
- Show how efficiency gains support growth without immediate hiring.

# 3 – PE Operating Partner

## Orchestrating Portfolio-Wide GTM Momentum

Operating Partners create leverage by standardizing oversight and sequencing across companies.

*Operating Partner*

### Key January Insight

January is when Operating Partners lock in portfolio-wide GTM metrics, review cadence, and establish clear intervention triggers, enabling early action rather than late surprises.

*Operating Partner*

## January GTM Mindset

→ **Think portfolio, not company consulting.**
Patterns beat heroics.

→ **Base portfolio oversight on a focused set of GTM metrics.**
Use consistent measures, such as sales velocity, pipeline coverage, win rates, and customer churn rate, so that performance can be compared across companies and issues can be identified early.

→ **Scale repeatable processes to maximize leverage.**
Reduce dependence on founders and top sales reps.

→ **Aim for 10–15% quick wins by improving sales velocity.**
Drive near-term growth by enhancing deal size, win rates, cycle times, and rep productivity. Early velocity gains build credibility and momentum.

→ **Ensure GTM alignment before approving additional spending.**
Confirm process, roles, coverage, incentives, and operating cadence before adding headcount or tools.

*Operating Partner*

## January GTM Recommendations

**Week 1**
- Segment portfolio companies into Green, Yellow, and Red based on GTM performance.
- Deploy GTM specialists to Red companies quickly to stabilize execution risk.

**Week 2**
- Observe high-performing teams to identify repeatable GTM practices.
- Document patterns that can be applied across the portfolio.

**Week 3**
- Deploy GTM specialists for ICP, data, sales execution, or retention gaps.
- Identify 1-2 high-value AI pilots tied directly to GTM efficiency.

**Week 4**
- Lock a monthly portfolio GTM review cadence using consistent metrics.
- Establish quarterly GTM deep dives and monthly C-level portfolio peer discussions.

# 4 – Marketing Manager

## Delivering Predictable Pipeline at Lower CAC

Turning January into a high-quality month shapes the Q1 pipeline by partnering with Sales and Customer Success to define the ideal customer profile, buyer readiness, and lead qualification standards

*Marketing Manager*
### Key January Insight

**January decisions on ICP and qualification determine win rates for the year.**

*Marketing Manager*
## January GTM Mindset

→ **Great marketing makes selling easier.**
Success is measured by faster sales cycles, higher win rates, and stronger ACV - not lead volume.

→ **A more precise ideal customer profile improves win rates and customer acquisition cost efficiency.**
Focused targeting reduces wasted spend and improves pipeline quality.

→ **Pre-suasive marketing shortens sales cycles.**
When buyers understand the problem, impact, and solution before the first interaction, Sales spends less time educating and more time qualifying and closing.

→ **Cross-functional alignment enhances pipeline quality.**
Shared ICP, lead definitions, and handoff standards between Marketing, Sales, and CS outperform additional campaigns or spend.

*Marketing Manager*
## January GTM Recommendations

**Week 1**
- Analyze win-loss and churn data to understand which segments convert and retain at acceptable rates.
- Jointly define A/B/C ICP tiers with Sales and Customer Success to focus effort on the most profitable segments.

**Week 2**
- Align MQL and SQL definitions with Sales to ensure leads passed are consistently sales-ready.
- Cut low-win-rate channels that consume budget without producing a qualified pipeline.

**Week 3**
- Deploy pre-suasive content that improves buyer readiness before Sales discovery conversations.
- Share buyer engagement insights with Sales to improve qualification and early-stage conversations.

**Week 4**
- Shift spend toward A-tier ICP targets to prioritize pipeline quality and ACV over volume.
- Launch weekly Sales-Marketing reviews to inspect lead quality and conversion early in Q1.

# 5 – Sales Manager

## Engineering Predictable Team Revenue

Sales Managers are responsible for team quota attainment and execution standards.

*Sales Manager*

## January Mindset

→ **Apply the 80/20 principle intentionally.**
Focus inspection and coaching on the deals, segments, and behaviors that actually convert - not broad activity metrics.

→ **Maintain daily alignment with the go-to-market strategy.**
Ensure messaging, qualification, pricing discipline, and handoffs are consistent across reps to reduce friction and rework.

→ **Set high standards for buyer interactions.**
Inspect call quality, discovery rigor, and deal narratives - execution quality shows up in win rates and sales cycle time.

→ **Take responsibility for the Sales-to-Customer Success handoff.**
Standardize close criteria and customer expectations to ensure deals arrive clean, setting up retention and expansion from the start.

*Sales Manager*

## January Recommendations

**Week 1**
- Conduct a deal-by-deal pipeline review to assess qualification and close likelihood.
- Disqualify stalled or low-probability deals early to refocus team effort.

**Week 2**
- Refresh training and playbooks using Q4 best practices and common deal patterns.
- Coach middle performers on discovery, qualification, and deal progression.

**Week 3**
- Enforce CRM data standards to improve forecast accuracy and deal inspection.
- Train reps on consistent Sales-to-CS handoff expectations.

**Week 4**
- Launch a weekly execution cadence focused on pipeline health and conversion.
- Align dashboards and metrics to reinforce accountability and focus.

# 6 – Account Executive/Sales Representative

## Exceeding Quota Through Segmentation and Discipline

### Key January Insight

Top performers use January to lock in territory plans, pipeline strategy, and deal sequencing - before quota pressure forces reactive selling.

*Account Executive*

## January Mindset

→ **Segment accounts with clear intent.**
Allocate time by account potential, deal stage, and velocity.

→ **Maintain discipline in daily execution.**
Start each week with account plans, maintain clean pipeline notes, and follow up on next steps within 24 hours.

→ **Work backward from quota requirements.**
Know your required pipeline coverage, win rates, and cycle time to prioritize the right deals early.

*Account Executive*

## January Recommendations

**Week 1**
- Segment territory into A, B, and C accounts based on ICP fit and past conversion.
- Walk away from low-probability opportunities that dilute focus.

**Week 2**
- Identify personal skill gaps in discovery, demos, or negotiation.
- Update personal messaging and playbooks based on recent wins.

**Week 3**
- Build a pipeline with accounts that match ICP and buying readiness.
- Keep CRM current to support accurate forecasting and deal reviews.

**Week 4**
- Set weekly priorities aligned to quota math and pipeline health.
- Track activity and follow-up discipline consistently entering Q1.

# 7 – Customer Success Manager
## Where Value Is Defended and Expanded

*Customer Success Manager*

## January Mindset

→ **Onboarding sets the trajectory.**
Focus on time-to-first-value to reduce buyer's remorse and churn risk.

→ **Retention creates the foundation for expansion.**
Expansion follows demonstrated outcomes, consistent usage, and executive trust - not renewal dates.

→ **Segment accounts by value and risk.**
Not all accounts are equal. Prioritize effort based on ARR, expansion potential, and customer churn indicators.

*Customer Success Manager*

## January Recommendations

**Week 1**
- Segment accounts by ARR, expansion potential, and health.
- Identify renewal risk and at-risk accounts early in Q1.

**Week 2**
- Redesign QBRs into outcome-focused impact reviews.
- Refresh expansion messaging aligned to proven customer value.

**Week 3**
- Audit onboarding steps to reduce time-to-first-value.
- Standardize Sales-to-CS handoff expectations.

**Week 4**
- Launch weekly renewal and expansion reviews.
- Align CS execution cadence to retention and NRR goals.

# Ready to Make January Count?

Craig Group is a revenue growth advisory and implementation firm that works exclusively with PE-backed, lower middle-market companies to align their go-to-market strategy with execution and accelerate organic revenue growth across the full customer lifecycle.

We partner with PE Sponsors, Operating Partners, CEOs, CROs, and GTM leaders to:

- **Increase sales velocity by 15-25%**
- **Reduce customer churn by 10-15%**
- **Accelerate GTM ramp times**
- **Unlock ROI from prior GTM investments**
- **Build sustainable revenue engines**

## If January is essential for your portfolio, let's connect.

PE timelines are short. Early execution determines how much value compounds over time.

**Let's Connect**

## About Brian Gustason

Brian Gustason is an experienced PE Portfolio Operations executive and consultant with 20+ years of growth & operational improvement experience working with independent and PE-backed B2B services and SaaS/technology businesses. As a Partner with Craig Group, Brian provides growth-focused consulting and implementation services to PE firms and their portfolio businesses. Previous experience includes commercial banking experience with Bank of America, strategy consulting experience with Booz Allen Hamilton & PricewaterhouseCoopers, and CEO/COO roles with various B2B services & technology businesses.

Brian earned a B.S. in economics from The Wharton School, University of Pennsylvania, and an MBA from the Said Business School, Oxford (UK). Professional certifications include Revenue Architecture Certification from Winning By Design & NACD Board Director Certification (NACD.US).

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