

Head of Sales & Marketing — Transition & Execution Blueprint

From zero to a fully operational, automated and delegated revenue engine — and a disciplined off-ramp from doing the work to governing it.

Operational Playbook · Prepared September 2026 · Confidential — Internal

§0 Executive summary

The mandate is singular and demanding: stand up CallableAI's **entire commercial engine from a blank slate** — messaging, funnel, CRM, demos, paid acquisition, outbound, and the first hires — then **systematically delegate it** so the operator moves from front-line execution to strategic oversight inside twelve months.

This blueprint sets out the full role scope, an honest feasibility read, market compensation benchmarks, a cash-based reward structure, a three-phase execution roadmap (Foundation → Systemisation → Delegation), the operating cadence and dashboards that make the engine measurable, and the hiring profiles for the eventual handover. The north star throughout: reach a revenue engine that is **repeatable, measurable and delegable**, not one that depends on any single person's heroics.

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DISCIPLINES FUSED IN ONE SEAT

90–180d

FOUNDER SOLO SPRINT

12 mo

TO FULL DELEGATION

<20%

FOUNDER TIME ON IC WORK BY M12

§1 Role scope — titles, roles & responsibilities

The operator functions as **Head of Sales & Marketing** — an integrated GTM Lead, VP of Sales and Head of Growth in one seat. The scope resolves into three pillars.

A · GTM & Sales Process Architecture

Design and document the end-to-end commercial funnel; build the CRM; automate and manually sequence touchpoints; own retention and expansion.

B · Acquisition & Marketing Arsenal

Engineer multi-channel lead-gen; conceive ad angles, hooks and creative; direct external designers; build a converting collateral library.

C · Sales Execution & Team Development

Run high-value demos personally; grind outbound in downtime; recruit, onboard and coach reps; build the management layer to hand off.

Pillar A — the end-to-end commercial funnel

Meeting / Demo
qualify & show value

Proposal / Pricing
tiered, scoped

Legal / MSA
e-sign agreement

Payment
automated billing rails

Onboarding
time-to-value

Retention / Expansion
QBRs, upsell

- **CRM architecture:** a single source of truth (HubSpot / Pipedrive / Close) with defined stages (New → Qualified → Demo Booked → Demo Done → Proposal → Verbal → Closed-Won/Lost), mandatory fields (source, ICP segment, use-case, deal size, next step + date), and automations (lead routing, task creation, stalled-deal alerts, no "next step, no future date" deals allowed).
- **Touchpoint sequences:** automated where volume demands (inbound speed-to-lead auto-reply within 5 minutes; nurture drips), manual where the deal is worth a human (post-demo recap + next step, proposal follow-through, "break-up" email). Every sequence has a defined

trigger, cadence and exit.

- **Client-book & retention:** named-account ownership, an onboarding checklist that drives fast time-to-value, scheduled check-ins/QBRs, and an expansion framework (usage triggers → upsell conversations). Retention is a revenue lever, not an afterthought.

Pillar B — acquisition strategy & marketing arsenal

- **Multi-channel lead engines:** Google Ads (high-intent search — "AI voice agent", "AI receptionist", competitor terms), Meta Ads (demand-gen + retargeting with demo-video creative), targeted cold email (tight ICP lists, deliverability-first infrastructure), and — the differentiator — **internal AI-driven outbound using CallableAI's own voice agents**. Dogfooding the product for pipeline is both the cheapest SDR layer and the most credible proof point in every demo.
- **Creative & copy:** conceive ad angles and hooks (problem-agitate around missed calls / cost-per-human-call / after-hours coverage; ROI-led "\$0.40 vs \$7–12 a call"), write the first-draft copy, then direct external designers to build a high-converting collateral library (landing pages, one-pagers, demo decks, case studies, ad sets).
- **Proof engine:** convert every early win into a case study / testimonial / usage stat. Social proof compounds and lowers CAC across every channel.

Pillar C — sales execution & team development

- **Personally close early:** run all high-value inbound and high-intent demos to maximise early conversion velocity and to learn the objections first-hand — the raw material for the playbook.
- **Grind outbound in downtime:** disciplined pipeline-generation sprints (calls + email + Callable-agent outbound) to seed design partners and never let the pipeline run dry.
- **Build the team:** source, recruit, onboard and mentor the first reps; set daily KPIs and a coaching cadence; design the management layer, reporting dashboards and operating rhythm required to hand daily oversight to a dedicated Sales Manager.

§2 Feasibility assessment — one-person execution

VERDICT

Unrealistic as an indefinite permanent state — but entirely necessary and standard as an initial 90-to-180-day founder-operator sprint.

The conflict. This role forces one person to bridge three distinct senior disciplines at once: *right-brain* creative marketing, *left-brain* sales-process engineering and closing, and *high-volume tactical* grinding (SDR work in the gaps). Few individuals are elite at all three, and even fewer can sustain all three simultaneously.

The reality. Bootstrapping this personally is the most capital-efficient path to product-market fit and revenue validation — nobody understands the customer or the objections faster than the person building the engine. The risk is burnout, so the entire plan is built around **strict phase-based delegation** rather than indefinite heroics.

Mitigations that make the sprint survivable:

- Time-box the grind — the solo phase has an end date (≤180 days), not an open-ended one.
- Let the product carry the SDR load — Callable's own voice agents absorb outbound volume a human otherwise would.
- Automate the repeatable early (speed-to-lead, sequences, CRM hygiene) so human hours go to closing, not admin.
- Hire the *tactical* layer first (\$5, Phase 2) — the cheapest, fastest relief valve.
- Protect deep-work blocks for the creative/architecture work that can't be done between calls.

§3 Market valuation & compensation benchmark

For an independent, top-tier **full-stack GTM operator** with AI SaaS experience hired off the open market, the Australian benchmark is:

COMPONENT	MARKET RANGE (AUD)	NOTES
Base salary	\$140,000 – \$180,000 + super	Executive-level breadth: strategy + closing + team build

On-target earnings (OTE)	\$220,000 – \$280,000+	Inclusive of performance incentives at target
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Context. A **\$120,000 base with no commission** sits materially below market for a role carrying this breadth of responsibility. It is nonetheless defensible for the founder-operator as a deliberate, strategic decision: it is an investment in personally building the commercial division to validated product-market fit, made on the explicit condition that the structure includes a **clear off-ramp** (§5) and **upside tied directly to the enterprise-value growth being engineered** — delivered through the performance-bonus structure in §4 once the division is generating revenue.

§4 Cash compensation structure

- **Cash-based reward.** Standard, competitive cash wages paired with performance bonuses — no complexity, fully aligned to results.
- **Bonuses switch on when the engine is real.** Performance bonuses are deployed *only once the division is fully operational, revenue-generating and established* — not paid against a pipeline that hasn't yet converted.
- **Suggested bonus triggers** (set targets once Phase 1 data exists): recurring-revenue milestones (e.g. bonus steps at defined MRR thresholds), net new client count, and retention / net-revenue-retention gates so growth isn't bought at the cost of churn.
- **Review cadence.** Re-benchmark base + bonus at the end of Phase 2 against validated unit economics, moving the package toward market as the division proves out.

§5 Phased execution roadmap — from scratch to delegation

Phase 1 · Foundation & Manual Sprint

Months 1–3

Focus: the founder-operator builds everything from the ground up and personally lands the first paying clients.

Milestones

- Lock the core: ICP definition, positioning & messaging, demo script(s), pricing tiers, and the first email sequences.
- Stand up the infrastructure: CRM (stages + fields + automations), payment/billing rails, e-signature MSA flow, and an automated client-onboarding path.
- Run all inbound demos personally; execute outbound sprints (calls + email + Callable-agent outbound) to secure design partners and first paying clients.
- Launch initial Google + Meta campaigns; test 3–5 creative hooks and kill the losers fast.

KPIs: # design partners signed · first recognised revenue · demo→close rate · pipeline \$ created · speed-to-lead (target <5 min) · cost per booked demo (directional).

Phase 2 · Systemisation & First Hires

Months 4–6

Focus: prove the unit economics and bring in a lower-cost tactical execution layer.

Milestones

- Document the playbook into a standardised training manual (funnel, scripts, objection handling, CRM SOPs, cadences).
- Hire the first execution-focused team member(s) — an SDR and/or AE — to take over cold outreach and routine demos.
- Refine CAC, LTV, sales-cycle length and conversion rates from real customer data; identify the highest-ROI channel and double down.

KPIs: CAC & LTV validated (LTV:CAC trending ≥3:1) · new-rep ramp time · cost per meeting · channel-level ROAS · win rate by segment · pipeline coverage (≥3× target).

Phase 3 · Leadership Transition & Delegation

Months 7–12

Focus: step back from day-to-day operations to high-level oversight.

Milestones

- Hire or promote a dedicated Sales Manager to own daily team accountability, coaching, pipeline management and the forecast.
- Hand recurring ad management and outbound scaling to specialist contractors or junior marketing staff.
- Transition the founder to strategic oversight, governance, and high-level enterprise relationship management.

KPIs: % pipeline owned by the team (target >80%) · Sales Manager owns the forecast · founder IC time <20% · forecast accuracy · net revenue retention · team attainment vs quota.

§6 Operating cadence & dashboard

Delegation only sticks if the business runs on a rhythm and a shared scoreboard rather than the founder's memory.

CADENCE	WHAT RUNS	OWNER (BY PHASE)
Daily	Activity stand-up (calls, demos, pipeline moves); speed-to-lead check	Founder → Sales Manager
Weekly	Pipeline review, forecast, deal inspection, channel performance	Founder → Sales Manager
Monthly	Unit economics (CAC/LTV/ROAS), cohort retention, hiring & comp review	Founder
Quarterly	Strategy, target reset, QBRs with key accounts	Founder (governance)

CORE DASHBOARD METRICS

Pipeline created & coverage · demo→close rate · sales-cycle length · CAC & LTV:CAC · channel ROAS · win rate by segment · new-logo & expansion MRR · net revenue retention · rep attainment & ramp · forecast accuracy.

§7 Profile & hiring blueprint for future replacements

ROLE	PROFILE	INDICATIVE AUD
Inbound / Outbound Closer (future Sales Rep / AE)	High energy, technically literate, comfortable navigating objections with business owners, and able to execute high-velocity software demos without hand-holding. Hungry, coachable, thrives on activity.	Base \$70–90k + super · OTE \$110–150k
Tactical Sales Manager	Has scaled a B2B SaaS sales floor from ~2 to ~10 reps; obsessive about CRM hygiene, pipeline velocity and daily activity metrics. Executes and enforces the playbook — doesn't need to invent it from a blank slate.	Base \$130–160k + super · OTE \$200–250k
Marketing / Ads contractor	Specialist to own recurring Google/Meta management and creative iteration once the channels are proven; performance-accountable.	Retainer \$3–8k/mo or performance-based

Cultural & behavioural fit (all hires): operators who thrive in a fast-moving, ambiguous AI-startup environment rather than rigid, slow corporate structures. Bias to action, comfort with change, and genuine curiosity about the product and the customer.

§8 First 30 days — quickstart

- **Week 1:** Finalise ICP + positioning; draft the demo script; choose and configure the CRM (stages, fields, speed-to-lead automation).
- **Week 2:** Stand up payment rails + MSA e-sign + onboarding checklist; write the first inbound + post-demo email sequences.
- **Week 3:** Launch Google + Meta with 3–5 hooks; build the first cold-email list + Callable-agent outbound cadence; start booking demos.
- **Week 4:** Run demos; log every objection; convert first design partners; set the weekly pipeline review that will later belong to the Sales Manager.