



Target Account Profile — V2

Enterprise Sales Execution

B2B SaaS — E-commerce & Revenue Operations Software

Helix Commerce

<https://helixcommerce.io>

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Prepared for Demo Corp

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01 — Executive Summary

Why This Account

Helix Commerce is a textbook NovaSpark ICP account: Series C funded, doubling sales team, VP Sales in first 90 days, active RevOps tooling evaluation, ZoomInfo renewal window, and a modern HubSpot data stack with zero integration friction. All five buying pre-conditions are active simultaneously — this is a tier-1 priority account.

Top Business Pressures

Scaling from 12 to 24 AEs with no account intelligence upgrade — ramp time and quota attainment at risk.

VP Sales Marcus Webb in first 90 days with board pressure to show forecast predictability.

ZoomInfo contract renewal creating a natural budget re-evaluation moment.

NetSuite ERP implementation creating data complexity and analytics gaps that NovaSpark can help bridge.

Monetizable Opportunities

ZoomInfo displacement (\$28K/yr existing budget redirected to NovaSpark — net new spend is near-zero for buyer).

Account prioritization automation: 24 AEs × 3 hrs/week × \$60/hr = \$225K/year in recovered selling time.

Pipeline forecasting upgrade: replace spreadsheet with NovaSpark AI confidence scoring — direct VP Sales pain.

Expansion motion: post-initial close, Helix Commerce is a strong candidate for NovaSpark's enterprise plan as they scale past 30 AEs.

Why Now

Marcus Webb is 90 days into his VP Sales role — this is the highest-leverage moment to land. After day 90, priorities shift from 'build the foundation' to 'execute the plan', and tool evaluation windows close for 6–12 months. The Series C hiring wave also means new AEs start ramping Q2 2026 — tooling must be in place before they onboard, or bad habits form that are expensive to break.

02 — Company Overview

| | |
|----------------|--|
| Company | Helix Commerce |
| Website | https://helixcommerce.io |
| Tagline | <i>The operating system for modern B2B commerce teams</i> |
| Founded | 2019 |
| Headquarters | Austin, TX, USA |
| Sector | B2B SaaS |
| Industry | E-commerce & Revenue Operations Software |
| Business Model | SaaS subscription — platform fee plus per-transaction revenue share for payment processing |
| Target Market | Mid-market B2B companies with 50–500 sales reps |
| Funding Stage | Series C |

Revenue Streams

Monthly SaaS subscriptions (\$4.2K–\$18K/month per customer) Payment processing revenue share (0.3% of GMV) Professional services for enterprise onboarding

Strategic Positioning

Helix Commerce positions as the all-in-one operating platform for B2B commerce teams — combining CRM, order management, invoicing, and revenue analytics in a single product. They compete against vertical-specific tools by offering breadth with strong integrations.

Where They Create Value vs Competitors

Native payment processing + order management in one platform, which eliminates the Stripe/QuickBooks/CRM integration tax their competitors require.

Key Services

Revenue Operations Order Management Sales Analytics Payment Processing

Key Products

Helix Core (CRM + OMS) Helix Pay Helix Forecast

Target Industries

B2B Manufacturing Wholesale Distribution Industrial SaaS Logistics Tech

03 — Leadership & Buying Map

Economic Buyer

VP of Sales — Marcus Webb (ex-Salesforce, hired Feb 2026)

Priorities: Pipeline predictability · AE productivity · Forecast accuracy

Pain points: Sales team doubled overnight with no tooling upgrade · Manual forecasting in spreadsheets costs 4 hrs/week per manager

Buying trigger: First 90 days in seat — actively evaluating new RevOps tooling to establish operational baseline

Technical Buyer

Head of Revenue Operations — Sarah Tan

Concerns: Data accuracy · HubSpot integration depth · Maintenance overhead

Evaluates on: Native CRM sync (no Zapier) · Signal freshness (< 24hr latency) · SOC2 Type II compliance

Champion Roles

Senior RevOps Analyst — Revenue Operations

Motivation: Reduce manual account research from 3 hrs/week to near-zero; wants to prove ROI to leadership within 60 days

Senior Account Executive — Sales

Motivation: Wants prioritized account lists delivered every Monday — stop guessing who to call

Likely Blockers

Head of Security & Compliance

Will require SOC2 Type II report, data processing agreement, and vendor security questionnaire before approval

CFO

Likely to benchmark against ZoomInfo renewal cost — NovaSpark must demonstrate clear ROI delta

How Decisions Are Made

VP of Sales owns budget and final sign-off. RevOps evaluates and recommends. Security and Legal must approve. Typical process: 2-week trial → RevOps recommendation → VP approval → Legal/Security review → procurement. Total timeline estimated at 6–10 weeks.

Org Signals

Active hiring for 'Sales Intelligence Analyst' (LinkedIn, March 2026) signals intent to invest in account intelligence. Series C board likely expects tooling upgrade as part of team scale plan.

C-Suite

Diana Reyes
CEO & Co-Founder

Previously CRO at OrderDynamics (acquired 2021). Board seat at two FinTech SaaS companies. Focused on product-led expansion.

Ben Okafor

CTO & Co-Founder

Ex-Stripe engineering lead. Built Helix's payment infrastructure. Drives all technical vendor decisions in partnership with RevOps.

Marcus Webb

VP of Sales

Ex-Salesforce Enterprise AE (7 years), then VP Sales at Klaviyo (2021–2025). Known for process-heavy sales culture and heavy RevOps investment.

VP-Level Leaders

Sarah Tan

Head of Revenue Operations — RevOps

Jordan Kim

Senior RevOps Analyst — RevOps

Priya Nair

VP Marketing — Marketing

Recent Leadership Changes

Marcus Webb (VP Sales) hired February 2026 — in first 90 days, actively evaluating tooling.

CFO role open as of January 2026 — interim CFO from board. May slow deal approval if hire lands mid-evaluation.

04 — Tech Stack & Architecture Analysis

Core Systems

| | |
|---------|---|
| ERP | NetSuite (mid-implementation, go-live Q3 2026) |
| CRM | HubSpot CRM (Sales Hub Enterprise) — primary system of record |
| HRIS | Rippling |
| Finance | QuickBooks Online (transitioning to NetSuite) |
| Other | Slack, Notion (internal wiki), Loom (async sales enablement) |

Tech by Category

| | |
|---------------|---|
| Marketing | HubSpot Marketing Hub |
| Analytics | Looker (connected to Snowflake data warehouse) |
| Project Mgmt | Linear (engineering) + Notion (cross-functional) |
| Communication | Slack, Zoom, Loom |
| Data Platform | Snowflake + dbt (modern data stack, ~12 months old) |
| Other | ZoomInfo (\$28K/yr, renewal Q3 2026), Gong (conversation intelligence), Outreach (sales engagement) |

Integrations

HubSpot ↔ Slack (deal notifications) HubSpot ↔ Outreach (sequence sync) Snowflake ↔ Looker (BI dashboards) ZoomInfo ↔ HubSpot (contact enrichment)

Automation Gaps

No automated account scoring or prioritization — AEs manually decide who to work each week.

No buying signal tracking — org changes, funding news, and job postings are researched manually by AEs.

Pipeline forecasting is done in a shared spreadsheet; no AI confidence scoring in HubSpot.

Manual Processes

AEs spend 2–4 hours/week researching accounts before outreach — no tooling automates this.

RevOps runs a weekly manual CRM hygiene pass to correct missing fields and stale stages.

Competitive intel is gathered ad hoc by individual reps — no centralized signal repository.

Where Inefficiencies Occur

Account prioritization (pre-call research) — 2–4 hrs/AE/week

Pipeline forecasting review — 3 hrs/manager/week in spreadsheet

CRM data hygiene — 4 hrs/RevOps analyst/week

Replacement Signals

ZoomInfo contract renewal due Q3 2026 — active re-evaluation underway (confirmed by RevOps).

VP Sales Marcus Webb has publicly referenced moving away from 'static contact databases' toward 'dynamic signal-based intelligence' (LinkedIn, March 2026).

Tech Maturity: Modern data stack (Snowflake + Looker), HubSpot Enterprise — above-average for their size. Ready to ingest NovaSpark signals via native integration without custom engineering.

05 — Financial & Growth Signals

| | |
|-----------------|--|
| Revenue Est. | \$18M–\$24M ARR (estimated, based on headcount, pricing, and customer count signals) |
| Total Funding | \$67M raised (Seed \$2M / Series A \$8M / Series B \$15M / Series C \$42M — Jan 2026) |
| Headcount Trend | Growing — 280 employees (Feb 2026), up from 190 in mid-2025 (+47% YoY). Sales team doubling from 12 to 24 AEs. |
| Headcount | 280–320 total employees (estimated LinkedIn + Crunchbase, April 2026) |

Funding History

Seed — \$2M

Q2 2019

Lead: 500 Startups

Series A — \$8M

Q1 2021

Lead: Bessemer Venture Partners

Series B — \$15M

Q3 2022

Lead: Insight Partners

Series C — \$42M

January 2026

Lead: Andreessen Horowitz (a16z)

M&A Activity

No acquisitions to date. Series C deck references 'strategic partnership pipeline' with 3 unnamed ERP vendors.

Other Financial Signals

Series C press release referenced 'doubling sales headcount' and 'investing in the RevOps tech stack' — direct budget signal.

NetSuite implementation underway (Q2–Q3 2026) — signals investment appetite and internal process upgrade cycle.

ZoomInfo renewal in Q3 2026 — active vendor re-evaluation window where NovaSpark can compete for displaced budget.

Estimated Economic Impact of Inefficiencies

Cost of the Status Quo

At 24 AEs spending 3 hrs/week on manual research at a \$120K OTE cost base, Helix Commerce is burning an estimated \$450K/year in lost selling time. NovaSpark's automated account prioritization recovers ~70% of that — a \$315K annual productivity gain that exceeds NovaSpark's ACV 3–4x.

06 — Strategic Priorities

Public Goals

Double ARR to \$40M+ within 18 months of Series C close (referenced in press release).

Expand sales team from 12 to 24 AEs by Q3 2026 — operational readiness for scale is a top priority.

Launch Helix Pay 2.0 with embedded net terms and BNPL for B2B — Q4 2026 product roadmap.

Deepen integrations with NetSuite, SAP, and Oracle ERP to serve enterprise B2B manufacturers.

Operational Targets

Achieve <90-day sales cycle for mid-market segment (current average: 140 days).

Reduce AE ramp time from 6 months to 3 months through better tooling and enablement.

Hit 110% net revenue retention by improving expansion motion across existing accounts.

Key Initiatives

RevOps tooling modernization: VP Sales Marcus Webb is leading a 60-day tool evaluation sprint across CRM, intent data, and forecasting (confirmed LinkedIn, Feb 2026).

NetSuite ERP implementation: Go-live targeted Q3 2026 — will replace QuickBooks and unlock cleaner revenue data for analytics.

Enterprise upmarket motion: New enterprise AE segment targeting \$50K+ ACV deals, requiring richer account intelligence.

Product-led expansion: Helix Pay 2.0 designed to expand ACV within existing customers without a full sales cycle.

Automation & Process Opportunities

Account Prioritization

Today: AEs manually decide which accounts to work each week based on gut feel and last interaction date in HubSpot.

Opportunity: NovaSpark delivers a ranked account list every Monday with AI-scored buying signals — AEs start the week knowing exactly who to call.

Value: Estimated 70% reduction in pre-call research time. At 24 AEs, that is 72 hours/week recovered — equivalent to 2 FTE selling hours.

Pipeline Forecasting

Today: Sales managers fill in a shared Google Sheet with deal stage, amount, and close date — reviewed in a 2-hour Monday call.

Opportunity: NovaSpark's deal confidence scoring layer inside HubSpot replaces the spreadsheet with AI-generated forecast confidence and risk flags.

Value: 3 hours/manager/week recovered. With 3 managers, that is 9 hours/week — and forecast accuracy improvements of 15–25% based on comparable deployments.

Competitive Intelligence

Today: AEs gather competitor intel ad hoc before calls — no centralized repository, no tracking of which competitors are mentioned in won/lost deals.

Opportunity: NovaSpark's competitor mention tracking in Gong + HubSpot enriches every deal record with competitive context automatically.

Value: Enables win/loss analysis at scale and surfaces which competitive angles close fastest — estimated 8–12% win rate improvement in contested deals.

Hiring Signals

Sales Intelligence Analyst role posted March 2026 (LinkedIn) — explicit signal of intent data investment budget.

4 new AE roles posted Feb–March 2026 — sales team scaling, increasing demand for account prioritization tooling.

Revenue Operations Manager role open (Q1 2026) — RevOps team expanding, budget authority growing.

Inferred Pain Points

AE onboarding is broken at scale — doubling headcount without upgrading tooling creates a ramp time crisis.

Forecast accuracy is low — spreadsheet forecasting fails at 24-AE scale; VP Sales likely under pressure from board to show predictable pipeline.

ZoomInfo ROI is declining — static contact data doesn't tell AEs who to call, only who exists. Gap between contact data and intent signals is the pain NovaSpark fills.

07 — Trigger Events (Prioritized)

January 2026

Series C funding closed (\$42M, a16z) — Helix Commerce announced doubling of sales team from 12 to 24 AEs.

HIGH

Why this urgency: New funding + headcount scale creates an immediate need for RevOps tooling upgrade before AEs ramp.

Buying window: New AEs onboarding Q2 2026 — if tooling isn't in place before they ramp, bad habits form. Decision window is now through May 2026.

February 2026

Marcus Webb hired as VP of Sales (ex-Salesforce, ex-Klaviyo) — known for heavy RevOps investment in prior roles.

HIGH

Why this urgency: New VP of Sales is in the critical 90-day window where new leaders make tool decisions to establish their operating model.

Buying window: First 90 days ends May 2026. After that, priorities shift to execution. Decision window: now through early May.

March 2026

Sales Intelligence Analyst job posting published on LinkedIn — explicit signal of intent data investment.

HIGH

Why this urgency: Hiring an analyst to do manually what NovaSpark automates — presenting NovaSpark now can redirect the hiring budget to the tool.

Buying window: If they hire the analyst before speaking to NovaSpark, the tooling decision gets delayed 3–6 months while the analyst ramps.

Q3 2026

ZoomInfo contract renewal due Q3 2026 — RevOps actively re-evaluating the contract.

MEDIUM

Why this urgency: Budget that currently goes to ZoomInfo (\$28K/yr) is the most natural budget source for NovaSpark — timing evaluation before renewal maximizes chance of budget redirect.

Buying window: ZoomInfo renewal decision likely made 60–90 days before Q3 end. Evaluation window: May–June 2026.

Q3 2026

NetSuite ERP go-live targeted Q3 2026 — cleaner revenue data will unlock new analytics and forecasting needs.

LOW

Why this urgency: NetSuite go-live will surface gaps in forecasting and pipeline visibility — creates a secondary window for NovaSpark expansion post-implementation.

Buying window: Secondary opportunity post-initial close. Plant seeds now, expand conversation after NetSuite lands.

08 — Opportunity Prioritization

Entry Use Case

#1 Account Prioritization for Scaling Sales Team

Deploy NovaSpark as the account intelligence and prioritization layer for 24 AEs — delivering weekly ranked account lists with AI-scored buying signals directly in HubSpot.

ROI rationale: 24 AEs × 3 hours/week recovered = 72 hours of selling time per week. At \$120K OTE, that is \$315K/year in productivity gains — 3–4x NovaSpark's ACV in year one alone.

Why urgent: New AEs onboard Q2 2026. If NovaSpark is not in place before they ramp, they learn manual research habits that are hard to break — and the VP Sales loses the credibility window to standardize tooling.

Secondary Use Cases (Expansion)

#2 ZoomInfo Replacement (Contact Intelligence + Enrichment)

When: Position as the ZoomInfo renewal conversation — redirect \$28K/yr to NovaSpark with superior ROI.

#3 Pipeline Forecasting Confidence Layer

When: After initial account prioritization is proven (60–90 days post-deploy) — expand into forecast scoring to address VP Sales' board reporting pain.

#4 Competitive Intelligence Automation

When: Phase 2 expansion — track competitor mentions across Gong and HubSpot to build a centralized win/loss intelligence repository.

Why This Is the Best Entry Point

Lead with account prioritization (the AE productivity pain) — it is the fastest-to-value use case, has the clearest ROI, and maps directly to the VP Sales' 90-day agenda. ZoomInfo displacement is the budget mechanism. Forecasting expansion is the upsell path at 6 months.

09 — Competitive Context

ZoomInfo — Active — \$28K/yr contract, renewal Q3 2026

Why they'd choose: Deep contact database familiarity; sales team already trained on ZoomInfo workflows; risk-averse buyers may extend the contract.

Why they'd reject: Static contact data provides no buying signal intelligence — AEs still have to manually decide who to call. VP Sales Marcus Webb has publicly critiqued 'old-school contact databases' on LinkedIn.

Our advantage: NovaSpark replaces ZoomInfo's core use case (contact data) AND adds real-time buying signal intelligence. Same budget — dramatically higher ROI. Direct ZoomInfo displacement play.

Bombora — No known relationship — likely evaluated as part of current tool review

Why they'd choose: Strong B2B intent data brand; enterprise credibility with a16z portfolio companies.

Why they'd reject: Bombora data requires heavy integration work to deliver actionable account lists — RevOps overhead is high. No HubSpot-native workflow automation.

Our advantage: NovaSpark delivers Bombora-equivalent intent data with zero integration tax — native HubSpot app, pre-built workflows, and a clean UI that AEs adopt in day one.

Apollo.io — Some AEs using personal Apollo accounts — not a company-wide contract

Why they'd choose: Low cost, familiar to AEs from prior roles; easy self-serve setup.

Why they'd reject: Apollo is a prospecting tool, not an account intelligence platform — no buying signal tracking, no pipeline confidence scoring, no CRM enrichment at depth.

Our advantage: NovaSpark is not a prospecting tool — it is an account intelligence layer. Different budget, different buyer (VP Sales vs. individual AE), different use case. Not a direct competitive situation.

Incumbent Risk

ZoomInfo is the primary incumbent with active contract (\$28K/yr, renewal Q3 2026). Risk is moderate — the contract gives ZoomInfo a renewal conversation, but the VP of Sales has publicly expressed dissatisfaction with static databases. NovaSpark should position as the upgrade, not a replacement fight.

Evaluation Readiness

High — Helix Commerce has an active tool evaluation underway (confirmed by RevOps job posting and VP Sales LinkedIn activity). HubSpot Enterprise data stack means zero integration friction. Budget exists (Series C runway + ZoomInfo renewal). Decision maker (Marcus Webb) is in first 90 days and motivated to make fast decisions. All four pre-conditions for a fast close are present.

10 — Deal Strategy

| | |
|-----------------------|---|
| Entry Motion | Outbound — contact Sarah Tan (RevOps) via LinkedIn, then email Marcus Webb (VP Sales) with a Series C benchmark framing. |
| First Use Case | Account prioritization for AE team — automated weekly account lists in HubSpot with AI buying signal scores. |
| Timeline | Target closed-won by end of May 2026 — before new AEs fully ramp and before the tooling evaluation window closes post-day-90 for Marcus Webb. |

Expansion Path

Initial land: account prioritization for 24 AEs (~\$42K ACV). 6-month expansion: add pipeline forecasting module (\$8K). 12-month expansion: enterprise plan with competitive intelligence and multi-CRM support (~\$65K ACV total). NRR target: 145% in year 2.

11 — Economic Value Hypothesis

| | |
|---------------------------|--|
| Cost Savings | \$28K/yr: ZoomInfo contract displaced. \$0 net new budget required if ZoomInfo budget is redirected. |
| Productivity Gains | 72 hours/week of AE selling time recovered from manual account research elimination. Equivalent to 2 additional FTE selling hours at current headcount. |
| Time to Value | Week 1: HubSpot integration live, account scores visible. Week 2: first automated account list delivered to AEs. Week 4: first measurable reduction in pre-call research time. |

Key Assumptions

24 AEs each spend 3 hours/week on manual account research (RevOps estimate, unconfirmed — verify in discovery).

Average AE OTE of \$120K used for productivity calculation — adjust based on Helix Commerce actual comp data.

ZoomInfo budget is available for redirect — confirm contract end date and renewal authority in first call.

HubSpot CRM is the system of record for all 24 AEs — no parallel CRM environments.

12 — Relationship Entry Points

Warm Connection Opportunities

a16z (lead Series C investor) — check NovaSpark investor network for warm intro to Helix Commerce leadership.

Insight Partners (Series B investor) — NovaSpark has 2 portfolio connections at Insight; potential warm intro path.

Klaviyo connection — Marcus Webb (VP Sales) spent 4 years at Klaviyo; NovaSpark has two enterprise customers from Klaviyo alumni network.

Events & Conferences

SaaStr Annual 2026 (San Francisco, September) Dreamforce 2026 (Marcus Webb likely attends — ex-Salesforce) RevOps Summit (Online, June 2026) B2B Commerce Summit (Austin, October 2026 — Helix's home market)

Communities & Associations

RevGenius (Sarah Tan is active member) Modern Sales Pros (Marcus Webb is listed member) HubSpot User Groups — Austin chapter SaaStr Community Slack

Thought Leadership

Publish a post-Series C benchmark report: 'How high-growth SaaS companies structure RevOps tooling after a funding round' — directly relevant to Helix Commerce's current situation and shareable to Marcus Webb.

Write a LinkedIn article on 'The hidden cost of doubling your sales team without upgrading your intelligence layer' — directly maps to Helix Commerce's current state.

Create a ZoomInfo vs. NovaSpark comparison page optimized for 'ZoomInfo alternatives 2026' — captures Helix Commerce mid-evaluation.

13 — Outreach Strategy

Hook — Series C + AE scale

Helix Commerce just closed \$42M and is doubling the sales team — the moment most companies realize their RevOps tooling wasn't built for that scale.

Congrats on the Series C. I work with 3 other VP Sales who doubled their teams post-funding and hit the same wall: the tooling that worked at 12 AEs breaks at 24. Happy to share a 10-minute breakdown of what they did in the first 90 days.

Hook — ZoomInfo renewal window

Helix Commerce's ZoomInfo contract renews in Q3 2026 — the window to redirect that budget to a higher-ROI tool is open now.

Noticed Helix is on ZoomInfo — with your renewal coming up, now is a good time to look at what NovaSpark does that ZoomInfo doesn't: real-time buying signals, not just contact data. Worth 20 minutes before the renewal decision?

Messaging Angle

Lead with the 'doubling sales team without upgrading intelligence layer' narrative — it maps perfectly to Helix Commerce's current state and creates immediate relevance. Anchor ROI to the ZoomInfo displacement story (\$28K budget redirect + NovaSpark ACV covered). Quantify the research time savings in their terms (24 AEs x 3 hrs/week = 72 hrs recovered weekly).

Tone

Peer-level, direct, data-led. Marcus Webb is a senior operator who will see through fluff — come with specifics, benchmarks, and a clear ROI hypothesis in the first message.

Channel

LinkedIn DM (Sarah Tan first — she is active and receptive), then Email (Marcus Webb — use the Series C congratulations hook), then LinkedIn (Jordan Kim — technical specs angle).

Sales Manager Review

OVERALL SCORE — 7.5/10

This is a high-quality, sales-ready profile with exceptional trigger events, clear synthesis/deal strategy, and strong financials. Critical gaps are incumbent banking vendor information and competitive positioning—an AE can execute week-one outreach with trigger events and entry points, but needs competitive/incumbent intelligence before advanced demos to avoid pitching against entrenched solutions.

This is a high-confidence, sales-ready profile with exceptional trigger events (9/10) and financial grounding (9/10) that immediately unlock multi-threaded outreach into a clearly mapped buying committee. The critical gap is competitive/incumbent mapping—we have no visibility into existing banking vendors, switching costs, or why they'd move from legacy systems, which will directly impact sales cycle timing and objection handling. Deploy this week for initial conversations, but plan to conduct vendor/contract discovery in first call to fill the incumbent risk and competitive context blindspots before advancing to technical evaluation.

| Section | Score | Rationale |
|------------------------------|-------|--|
| Leadership & Buying Map | 8 | Clear identification of economic/technical buyers with specific titles, motivations, and evaluation criteria makes this immediately actionable for multi-threaded outreach. Champion roles identified with department attribution, though C-suite/VP data gaps don't materially hurt usability given strong org signals around digital transformation focus. |
| Tech Stack & Automation Gaps | 7 | Automation gaps and manual processes are well-documented with specific locations (onboarding, password recovery, ticket routing), enabling concrete use-case conversation starters. However, null values for ERP/CRM/HRIS limit visibility into full tech footprint and dependency mapping needed for implementation planning. |
| Trigger Events | 9 | Exceptional richness with 7 concrete, time-dated events creating multiple urgency angles (17% growth ahead of plan, new offices opening, digital award, merger integration). Each event tied to buying motivation—this is sales-ready ammunition for week-one outreach. |
| Relationship Entry Points | 8 | CEO thought leadership through Global Banking & Finance Review, university partnerships (IESE Chair), and UN network involvement provide verified warm-entry vectors with specific names and publication outlets. Sports sponsorships less actionable, but UN/academic angles are immediately executable. |
| Outreach Strategy | 8 | Three concrete hook angles with example templates, tone guidance, and channel recommendations (LinkedIn) make this immediately deployable. Messaging angles tie to specific company wins (Merkaat, international expansion, sustainability), though lacks competitive context or objection pre-mapping. |

| | | |
|---------------------------|---|---|
| Synthesis & Deal Strategy | 9 | Exceptional strategic framework: primary use case (international platform modernization) mapped to specific pain (\$8-15M annually), entry motion (Spanish pilot), and 12-18 month timeline with clear expansion path. ROI hypothesis grounded in cost savings and productivity gains with documented assumptions. |
| overview | 6 | Good positioning narrative and competitive differentiation (relationship + digital UX) but founder year null, employee count null, and funding stage unknown limit historical context and org stability assessment. Revenue estimates are inferential rather than sourced. |
| financials | 9 | Richly documented with profit, business volume, growth rates, solvency ratios, credit rating, and market share—all independently verifiable and tied to deal logic. Economic impact estimate (\$8-15M inefficiency cost) is anchored to industry benchmarks and specific cost categories. |
| strategy | 7 | Clear public goals aligned to digital transformation, international expansion, and customer service differentiation provide directional context for messaging. Goals are somewhat generic ("innovation," "excellence") but specific enough to ground conversation topics around digital roadmap and growth priorities. |
| competitive_context | 5 | No direct competitor mention or market positioning versus peers (e.g., other Andorran banks, European private banks). Moat description focuses on differentiation but lacks context on incumbent threats or why they'd switch from legacy providers. |
| incumbent_risk | 6 | No mention of existing banking infrastructure vendors, integration patterns, or switching friction—critical for predicting sales cycle complexity. Legacy systems mentioned as problem but no vendor names or contractual lock-in duration identified. |
| evaluation_readiness | 7 | Technical evaluation criteria clearly mapped (security certifications, API compatibility, vendor stability, reference customers, compliance track record), giving AE clear proof points to prepare. Decision timeline (6-12 months) and committee-based process documented, though no insights into current evaluation stage or prior vendor discussions. |