CLIENT ONBOARDING GUIDE

Bridging Innovation and Growth

Client Company *	
Primary Contact & Title *	
Engagement Start Date *	
BridgeGTM Engagement Owner *	
Proposal / Quote #	

** Required field*

This guide walks your team through onboarding with TheBridgeGTM, covering how to confirm goals, define your Ideal Customer Profile, grant access, and set up the systems that power your engagement. Checkboxes marked (Required) are needed to kick off work; items marked (If applicable) only apply to some engagements. Click into any underlined field to type; click a box to check it.

1. Welcome

Welcome to TheBridgeGTM. This guide gives your team a structured, professional onboarding experience and establishes a shared roadmap for a successful engagement.

What You Can Expect

- A dedicated, fractional go-to-market team acting as an extension of your organization
- A structured onboarding process, with timeline and deliverable expectations set together at kickoff
- Transparent reporting against the goals defined in this guide

The Bridge Philosophy

We treat go-to-market as a system, not a set of disconnected tactics. Strategy, pipeline, messaging, and customer success work together toward measurable revenue outcomes.

The Commercial Operating System

Your engagement runs on TheBridgeGTM's Commercial Operating System: a repeatable framework connecting discovery, strategy, execution, and measurement so that your GTM motion compounds over time rather than resetting with every campaign.

2. Engagement Goals & Objectives

Use this section to confirm the goals already outlined in your proposal and capture anything new or refined since signing. For each objective, mark whether it is confirmed from the proposal or new/updated, and add the specific detail.

- ☐ **Primary revenue goal for this engagement** **(Required)**
  Status: ☐ *Confirmed from proposal* ☐ *New / updated for this engagement*
  Detail:

- ☐ **Target market / vertical focus** **(Required)**
  Status: ☐ *Confirmed from proposal* ☐ *New / updated for this engagement*
  Detail:

- ☐ **Pipeline generation target** **(Required)**
  Status: ☐ *Confirmed from proposal* ☐ *New / updated for this engagement*
  Detail:

- ☐ **Brand awareness / thought leadership goals** *(If applicable)*
  Status: ☐ *Confirmed from proposal* ☐ *New / updated for this engagement*
  Detail:

- ☐ **New product or service launch support** *(If applicable)*
  Status: ☐ *Confirmed from proposal* ☐ *New / updated for this engagement*
  Detail:

- ☐ **Executive visibility / GTM leadership support** *(If applicable)*
  Status: ☐ *Confirmed from proposal* ☐ *New / updated for this engagement*
  Detail:

- ☐ **Customer retention or expansion focus** *(If applicable)*
  Status: ☐ *Confirmed from proposal* ☐ *New / updated for this engagement*
  Detail:

- ☐ **Other engagement-specific objective** *(If applicable)*
  Status: ☐ *Confirmed from proposal* ☐ *New / updated for this engagement*
  Detail:

> *Tip: revisit this section at each Quarterly Business Review to confirm objectives are still current.*

3. Ideal Customer Profile (ICP) Worksheet

This worksheet defines who TheBridgeGTM should pursue on your behalf. The more specific the inputs, the sharper our targeting, messaging, and qualification will be. Complete every (Required) field before kickoff; (If applicable) fields refine targeting further.

FIRMOGRAPHICS

- [ ] **Industry / vertical focus** **(Required)**
- [ ] **Company size (employee range)** **(Required)**
- [ ] **Annual revenue range** **(Required)**
- [ ] **Geography / target region(s)** **(Required)**
- [ ] **Ownership / funding stage** *(If applicable)*

BUYER PERSONAS

- [ ] **Primary decision-maker title(s)** **(Required)**
- [ ] **Influencer / champion title(s)** *(If applicable)*
- [ ] **Economic buyer title(s)** *(If applicable)*

PAIN POINTS & BUYING TRIGGERS

- [ ] **Core problems this customer has** **(Required)**
- [ ] **Events or triggers that start a buying process** **(Required)**

FIT CRITERIA

- [ ] **Technology stack indicators** *(If applicable)*
- [ ] **Typical budget range** **(Required)**

☐ **Disqualifying criteria (who is NOT a fit)** *(If applicable)*

REFERENCE ACCOUNTS

☐ **Existing best-fit customers to model targeting from** **(Required)**

4. Onboarding Roadmap

Your onboarding timeline will be defined together with your engagement owner at kickoff, based on your specific scope. The phases below outline what happens in sequence. Use the field under each to note the target date once agreed.

Phase 1: Kickoff

- Kickoff meeting, business discovery, access requests

Target completion date:

Phase 2: Assessment

- CRM assessment, website review, GTM assessment, ICP development

Target completion date:

Phase 3: Design

- Messaging refinement, pipeline design, priority recommendations

Target completion date:

Phase 4: Launch

- Implementation begins, KPI dashboard, roadmap for next phase

Target completion date:

5. The Bridge Methodology

Discover: Understand your business, market, and current GTM motion

Assess: Evaluate CRM, website, pipeline, and existing assets

Design: Build the strategy, messaging, and ICP that will guide execution

Execute: Implement systems, launch outreach, and run the pipeline

Measure: Track performance against the KPIs defined in this guide

Optimize: Refine based on results each quarter

6. Your Success Team

TheBridgeGTM Responsibilities

- Strategy
- GTM execution
- CRM management
- Lead generation
- Customer success
- Partnerships
- Reporting

Client Responsibilities

- Decision making
- Product expertise
- Internal approvals
- Timely feedback

7. Communication Expectations

- ☐ **Weekly progress updates** **(Required)**
- ☐ **Biweekly working sessions** **(Required)**
- ☐ **Monthly strategy meeting** **(Required)**
- ☐ **Quarterly business review** **(Required)**

Preferred communication channel (email, Slack, etc.): ____________________

Primary client point of contact *: ____________________

8. Information We'll Need

Check off each item as it's provided. Items marked (Required) are needed before kickoff can begin.

- ☐ **Mission and company overview** **(Required)**
- ☐ **Products / services overview** **(Required)**
- ☐ **Pricing** **(Required)**
- ☐ **Ideal Customer Profile (see Section 3 worksheet)** **(Required)**
- ☐ **Current customer list** **(Required)**
- ☐ **Website access / overview** **(Required)**
- ☐ Brand assets (logo, fonts, colors) *(If applicable)*
- ☐ Sales collateral *(If applicable)*
- ☐ **CRM access** **(Required)**
- ☐ Current pipeline export *(If applicable)*
- ☐ **Sales process documentation** **(Required)**
- ☐ **Technology stack overview** **(Required)**

9. Access Checklist

Grant access to the platforms below as they apply to your stack. Notes fields are provided for usernames, plan tier, or admin contact.

- ☐ HubSpot *(If applicable)*
  Username / admin contact:
- ☐ Apollo *(If applicable)*
  Username / admin contact:
- ☐ **Google Workspace** **(Required)**
  Username / admin contact:
- ☐ LinkedIn (Company Page / Sales Navigator) *(If applicable)*
  Username / admin contact:
- ☐ **Website CMS** **(Required)**
  Username / admin contact:
- ☐ Hosting provider *(If applicable)*
  Username / admin contact:
- ☐ Cloudflare *(If applicable)*
  Username / admin contact:
- ☐ **Google Analytics** **(Required)**
  Username / admin contact:
- ☐ Search Console *(If applicable)*
  Username / admin contact:
- ☐ Calendly *(If applicable)*
  Username / admin contact:
- ☐ Microsoft 365 *(If applicable)*
  Username / admin contact:

10. Business Discovery Questionnaire

Please answer as completely as possible. These responses directly shape your ICP, messaging, and pipeline design.

1. Why do customers buy from you?

2. What problems do you solve?

3. Who is your ideal customer?

4. Who are your competitors?

5. What are your revenue goals?

6. Where do deals typically stall?

7. What are your biggest growth opportunities?

11. Success Metrics

Select the metrics that matter most for this engagement. We'll build your KPI dashboard around the items checked below.

- ☐ **Pipeline value** **(Required)**
- ☐ **Qualified meetings** **(Required)**
- ☐ Sales-qualified leads (SQLs) *(If applicable)*
- ☐ **Win rate** **(Required)**
- ☐ Sales cycle length *(If applicable)*
- ☐ Customer acquisition cost (CAC) *(If applicable)*
- ☐ Website leads *(If applicable)*
- ☐ Partner leads *(If applicable)*
- ☐ Renewals *(If applicable)*
- ☐ Expansion revenue *(If applicable)*

12. Working Together

How work requests are submitted *:

Expected response time *:

Standing meeting cadence *:

Document sharing method:

Escalation path / contact *:

13. Bridge Technology Stack

Your GTM motion runs through a connected pipeline:

Website → **Lead Capture** → **HubSpot CRM** → **Sales Pipeline** → **Customer Success** → **Renewals** → **Expansion**

Supporting Platforms

- Apollo: prospecting and outbound data
- AI tools: research, drafting, and enrichment
- Analytics: website and campaign performance
- Automation: workflow and sequencing
- Email: outbound and nurture delivery
- Reporting: KPI dashboard and pipeline visibility

14. Engagement Success Plan

Target dates for each phase will be set with your engagement owner based on scope. Use the fields below to record them once agreed.

Phase 1: Foundation

CRM setup, ICP finalization, messaging, and access are in place.

Target completion date:

Phase 2: Pipeline

Outreach is live, pipeline is building, and early results are visible in the dashboard.

Target completion date:

Phase 3: Optimization

Performance is reviewed against Section 11 metrics and refined heading into the next quarter.

Target completion date:

15. Deliverables

The items below reflect standard Growth Bridge deliverables. Confirm which apply to your specific scope.

- ☐ **CRM implementation** **(Required)**
- ☐ **Dashboards** **(Required)**
- ☐ **Messaging framework** **(Required)**
- ☐ **ICP & buyer personas** **(Required)**
- ☐ Website review *(If applicable)*
- ☐ **Outreach templates** **(Required)**
- ☐ AI prompt library *(If applicable)*
- ☐ Partnership strategy *(If applicable)*
- ☐ Customer success plan *(If applicable)*
- ☐ **KPI dashboard** **(Required)**

16. Frequently Asked Questions

When will we see results?

Timelines vary by scope and are set together with your engagement owner at kickoff. See the phase targets in Section 14.

How are meetings scheduled?

Per the cadence confirmed in Section 7, typically coordinated via the scheduler in Section 17.

Who owns the CRM?

Ownership is confirmed during onboarding and documented in Section 8.

Can additional users be added?

Yes, contact your engagement owner to request access changes.

How are priorities determined?

Jointly, based on the goals confirmed in Section 2 and reviewed at each strategy meeting.

17. Client Resources

- ☐ **Shared document repository** **(Required)**
  Link / contact:
- ☐ **Meeting scheduler** **(Required)**
  Link / contact:
- ☐ Project tracker *(If applicable)*
  Link / contact:
- ☐ Knowledge base *(If applicable)*
  Link / contact:
- ☐ Templates *(If applicable)*
  Link / contact:
- ☐ **Contact information** **(Required)**
  Link / contact:

Appendix: Client Snapshot

A one-page summary of your engagement, to be completed after the sections above are filled in. Use this as the quick-reference sheet for internal alignment.

Company Overview *	
Business Goals *	
Target Markets *	
Ideal Customer *	
Key Differentiators	
Technology Stack	
Key Contacts *	
Top 3 Priorities *	
Success Metrics *	