Example case

Kelvia is a hypothetical company: its figures are simulated data generated for this example. The process is real: RevOS Lite produced the conversation, the diagnostic and the plan as they are, without edits. The competitors that appear are real.

90-DAY PLAN

90-day plan — Kelvia

Kelvia · Closing deals

November 16, 2026 · Version 1 Final

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Document generated with AI by RevOS Lite (RevOps Studio's RevOS methodology).

RevOS Lite · November 16, 2026 · Based on the diagnosis of November 16, 2026 (v2, validated by the client)

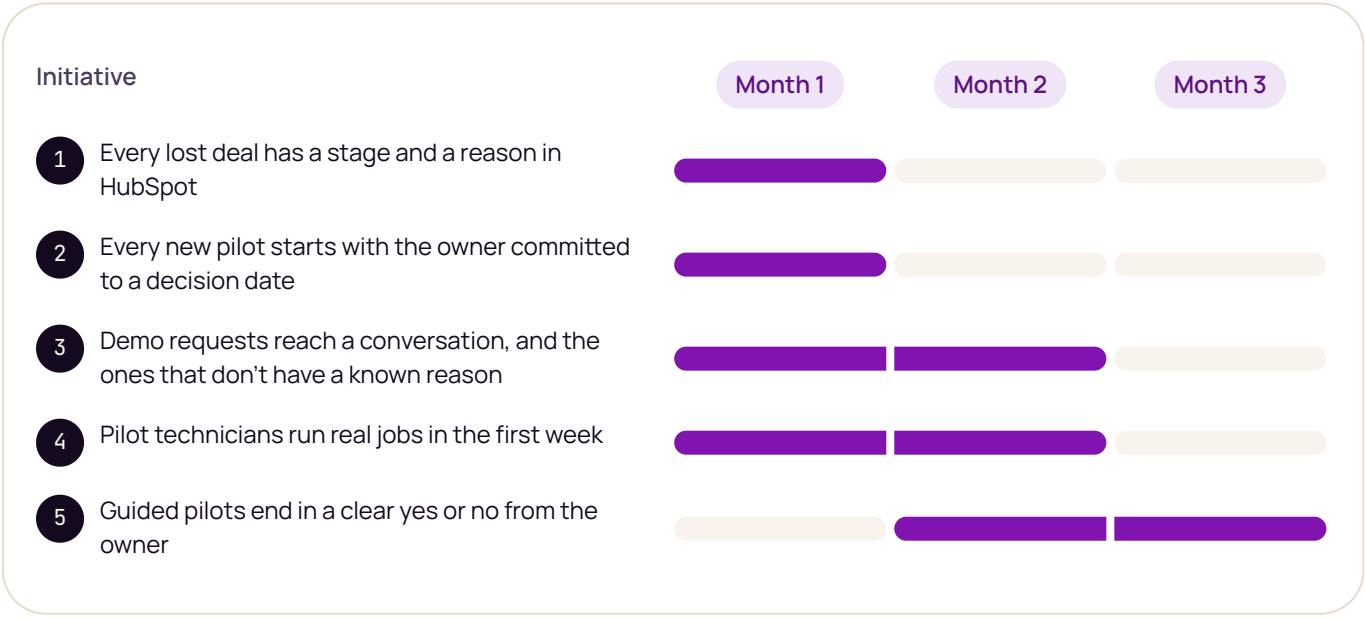
1. What changes in 90 days

> By the end of the quarter, every pilot will start with the owner committed to a decision date, have one person on Kelvia's side making sure technicians run real jobs in week one, and end in a day-30 decision meeting. Every lost deal and every request that doesn't reach a call will have a recorded reason. That attacks the break between pilot and decision directly, and you'll be able to see whether it's working.

Diagnosis thesis: Kelvia's revenue breaks mainly between the 30-day pilot and the owner's decision (only 2 of every 6 pilots sign), because the pilot is handed over as unattended access instead of being run as a managed sales stage, so most deals end in "no decision" rather than in a loss to a competitor.

Focus of the quarter: measure first (month 1), so every change can be compared with today. In parallel, the cheap changes at pilot entry (owner kickoff) and early pilot (day-3/day-7 check), because they need no new capacity. Then the guided pilot with a single owner (months 2–3), once the CEO has assigned that role. The early leak (requests that never get a call) is fixed in parallel, mostly with automation.

2. The initiatives



#	Initiative (result)	Responds to	Owner	Outcome milestone	Month	Depends on	Impact × Effort
1	Every lost deal has a stage and a reason in HubSpot	Bottleneck 4. Nothing records where and why deals are lost	CEO	Loss-reason coverage ≥90% for deals closed-lost in weeks 3–8	1	—	M × B
2	Every new pilot starts with the owner committed to a decision date	Bottleneck 2. Owner not committed before the pilot (and 1)	Lead AE (one of the two, named by the CEO)	100% of pilots started from week 3 have kickoff held, written success criteria and a decision date in HubSpot	1	1	A × B
3	Demo requests reach a conversation, and the ones that don't have a known reason	Bottleneck 3. A quarter of requests never reach a conversation	Second AE	Baseline request-to-call rate and top no-call reason established from ≥30 requests (≈8 weeks)	1–2	1	M × B
4	Pilot technicians run real jobs in the first week	Bottleneck 1. The pilot runs on its own (quick win)	AE running each pilot	Day-7 activation measured on ≥8 pilots, giving the first baseline for whether low usage is the app or lack of guidance	1–2	2	A × B
5	Guided pilots end in a clear yes or no from the owner	Bottleneck 1. The pilot runs on its own (structural)	Pilot owner (CSM by default; CEO confirms in week 4)	Pilot-to-signed rate of the first ~8 guided pilots that reach their day-30 decision, compared with the ~33% baseline	2–3	2, 4	A × M

1. Every lost deal has a stage and a reason in HubSpot

What gets done: Add a required loss-reason field on closed-lost (no usage / owner silent / not this year / competitor / integration / poor fit / other) and write one binary entry criterion per pipeline stage (e.g. "Pilot" = kickoff held with owner and decision date set). The AEs update open deals to the right stage once, then keep them current. **How you'll know it works:** Loss-reason coverage measure (HubSpot, monthly, CEO).

2. Every new pilot starts with the owner committed to a decision date

What gets done: Before sending logins, the AE runs a 30-minute kickoff with the owner and the service manager. A one-page template covers 2–3 written success criteria (e.g. "dispatcher schedules all jobs for 3 technicians through Kelvia in week 2"), the technicians involved, and a day-30 decision meeting in the owner's calendar. If the owner won't join, or it isn't a this-year purchase, the pilot waits and the deal goes to nurture. **How you'll know it works:** "Pilots started with owner commitment" measure (HubSpot properties, weekly).

3. Demo requests reach a conversation, and the ones that don't have a known reason

What gets done: A self-booking link in the demo-request confirmation, a reminder the day before and one rebooking attempt for no-shows. Use HubSpot's meetings link and email if your plan includes them; otherwise, a template email sent manually. For every request that doesn't reach a call, the AE logs why (no response / no-show / poor fit / other). **How you'll know it works:** Request-to-call rate and no-call reason (HubSpot, weekly). No target until the baseline exists. The diagnosis's illustrative ~85% is a reference only.

4. Pilot technicians run real jobs in the first week

What gets done: On day 3 and day 7, the AE calls the service manager to check which technicians have completed a real job in the app and walks the stuck ones through it on the call. The result goes in a HubSpot deal property. If the app records usage per technician, the product team shares that instead FALTA DATO. **How you'll know it works:** Day-7 activation measure. This is also the first test of the key assumption: if activation stays low even with these calls, the issue may be the app.

5. Guided pilots end in a clear yes or no from the owner

What gets done: One owner per pilot on Kelvia's side. They run a 1-hour live setup session with the pilot technicians in week 1, take over the day-3/day-7 checks from initiative 4, hold a 15-minute weekly touchpoint with the service manager, and lead a 30-minute day-30 decision meeting with the owner against the agreed criteria. That's about 2.5–3 hours per pilot, ~4 hours a week for ~6 pilots a month. Week 4: the CEO confirms who owns it (CSM by default, AE as fallback) and what that person stops doing to make room. **How you'll know it works:** Pilot-to-signed rate (HubSpot, monthly, CEO) for guided pilots versus the ~33% baseline. With ~6 pilots a month, about 8 guided pilots should reach their decision date by day 90. That's a first read, not a statistically solid result.

3. Month by month

Month	Starts	Milestones that should be visible at month end
Month 1	1, 2, 3, 4	Loss-reason field and stage criteria live. Kickoff template in use from week 3. Booking link and reminders running. Day-3/day-7 calls in every new pilot. CEO decision on the pilot owner (week 4)
Month 2	5 (guided pilots from the first pilot started this month)	Loss-reason coverage ≥90% (weeks 3–8). 100% of new pilots with owner commitment. Request-to-call baseline and top no-call reason (~30 requests)
Month 3	— (run and read)	Day-7 activation measured on ≥8 pilots. First ~8 guided pilots at their day-30 decision, with pilot-to-signed rate compared with ~33%

4. Capacity

Role	Initiatives	Estimated load	What the client declared
CEO	1, and the pilot-owner decision for 5	Low: ~2–3 hours in month 1 to set up fields and criteria, then ~1 hour/week to review measures	Joins bigger deals
Lead AE	2, 4 (own pilots)	Low–medium: ~30 min per kickoff (~3 h/month split between both AEs) plus day-3/day-7 calls until initiative 5 takes over	2 AEs, no SDRs, no new salespeople (12-month goal)
Second AE	3, 4 (own pilots)	Low: booking link and reminders setup (~2 h once), ~5 min per lost request to log the reason	Same
CSM (default pilot owner)	5	Medium: ~4 hours/week from month 2	Works only with paying customers today. ASUNCIÓN can free ~4 h/week without hurting existing customers; not objected at the checkpoint

Adjustments made for capacity: the guided pilot (5) waits until month 2, so month 1 adds no new role to anyone. Initiative 4 hands over to the pilot owner once 5 starts, so the AEs don't carry both. The CEO decides in week 4 what the pilot owner stops doing, so the 4 hours are real and not on top of a full week.

5. What comes next (months 4 to 12)

Quarter	Goal	Continues with	Decided with
Months 4–6	Set real targets and run guided pilots as standard	2, 4, 5 as routine. First targets for request-to-call and pilot-to-signed	Pilot-to-signed rate of guided pilots versus ~33%, and day-7 activation. If activation stays low with guidance → open a product track on the app's job flow. If loss reasons show integration or competitor losses growing → decide on QuickBooks integration or competitive messaging
Months 7–9	Fewer cancellations by connecting pilot and onboarding	Hand the pilot's success criteria and active technicians to onboarding. Review why customers cancel	Reasons for the 5 cancellations (CSM) and early churn among customers who came through guided pilots
Months 10–12	Grow volume where it converts best	Shift effort toward the lead sources with the best request-to-signed rate. The rebuilt website tells the guided-pilot story	Conversion by lead source (HubSpot, 6+ months of clean data) against the 4-customers-a-month goal

Sketch, to be revised with evidence from the first quarter.

6. What's left out and why

- **QuickBooks integration improvements:** 1 of the 8 lost pilots. Too little evidence to spend product time now. Revisited in months 4–6 with recorded loss reasons.
- **More demand or new channels:** not the main loss and not needed for the goal on current arithmetic. Revisited in months 10–12, by source.
- **Cancellation analysis:** low-confidence signal, and the same people are busy with the pilot. Revisited in months 7–9.
- **Website messaging:** the site is being rebuilt and wasn't analyzed. Revisit when the rebuild lands, to reflect the guided pilot.

7. Risks and assumptions

Risk or assumption	What would confirm or refute it	What changes in the plan if it happens
ASUNCIÓN low technician usage comes from lack of guidance, not the app being hard to use	Day-7 activation in guided pilots (initiatives 4–5)	If activation stays low → open a product track in months 4–6 and keep pilots shorter or smaller until fixed

Risk or assumption	What would confirm or refute it	What changes in the plan if it happens
Owners refuse the kickoff, so fewer pilots start in the short term	Share of prospects that decline the kickoff (initiative 2)	Fewer but better pilots is expected. If pilot starts drop by more than about a third with no rise in pilot-to-signed rate, loosen the rule (e.g. kickoff within the first week of the pilot)
ASUNCIÓN the CSM can free ~4 h/week without hurting paying customers	CEO's week-4 decision and CSM workload in month 2	If not → AE owns guided pilots with group setup sessions for several pilots, or fewer pilots run at once
ASUNCIÓN the AEs' recollection of 8 lost pilots is typical	Loss reasons recorded in months 1–3	If competitor or integration losses are larger, priorities shift in months 4–6
December–January holidays slow owner decisions	Decision dates slipping in month 2	Read month-3 results with that in mind. Don't change the pilot design because of a seasonal dip

Owners to be defined: none. The pilot owner for initiative 5 is the CSM by default, confirmed by the CEO in week 4.

How to read the labels

FALTA DATO A missing figure that could change the conclusion.

ASUNCIÓN Something the consultant takes for granted in order to move on. If it is wrong, correct it.

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