

The background features several large, rounded geometric shapes in shades of orange, red, and teal. These shapes are arranged in a way that creates a modern, abstract design. The central area is a large white rectangle with rounded corners, which serves as the backdrop for the text.

Revenue Modeling 101: Plan, Predict and Scale for 2026

Jonathan Burg, SVP Revenue, New Breed

Hello.

- Who is this presentation for, a note about AI and how to approach this session
- Strategic planning principles
- Alignment & modeling
- Strategic program planning
- Investments, ROI & alignment with the CFO
- Internal communications and org alignment
- Call to actions and next steps



Jonathan Burg
SVP of Revenue

NEW BREED +

NEW BREED +

The **only** three-time Top Partner.

The **only** tech-enabled Solutions Partner.

We help companies **unlock meaningful growth** with innovative, outcome-focused, technology-centric HubSpot services.

AI Services

Demand Generation

RevOps & CRM Strategy

Custom Integrations

Account Based Marketing

Website Development

Real customer results:

1,637% ROI from Demand Gen Program

557% Ad ROI by Aligning International Stakeholders

300 Leads + 300k in Pipe in 3 Months with ABM Strategy

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This session is from the perspective of the CRO

Who will benefit:

- VP of Marketing
- Director of Demand Generations
- VP of Sales
- Head of customer success

Every functional role must take an integrated mindset to planning.

Today's session will help you break down silos and align your planning efforts to the strategic objectives of the organization.

A note about AI



**The best report that
AI is having the
biggest impact in:**

1

Data analysis
& insights

2

Strategic Planning

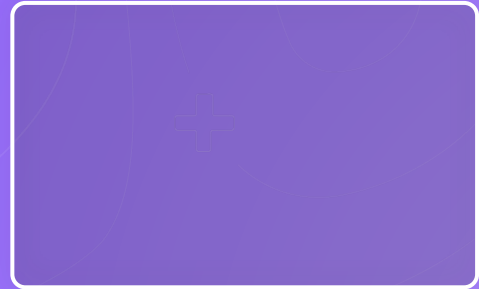
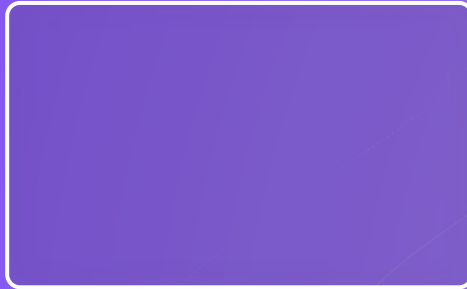
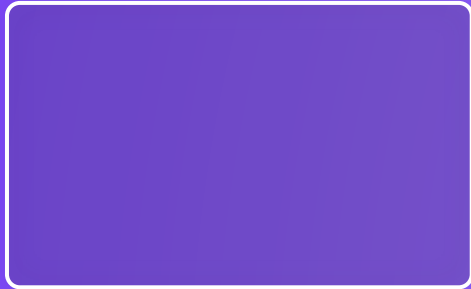


Guiding principles and forming the planning team

Forming the planning team

- This is your opportunity to align your organization
- Adopt a planning methodology, e.g., DARCI
- Forming the strategic planning team:
 - CRO
 - CFO
 - Revenue Operations
 - Product
 - Lines of Business leaders
 - Marketing
 - Sales
 - Customer Success

Strategic planning principles



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Strategic planning principles

Transparency

Integrated

Metrics Driven

Realistic,
Yet Challenging

Objective

Action Oriented

Insight into the revenue and profitability north star

- What are your growth and EBITA expectations from your board?
- Does your ELT have an offsite in the coming weeks. Is 2025 financial expectations an agenda item?
- What have your historical growth and profitability metrics been?
Can you use those to create an expectation for 2025?

Bringing the planning team together

Kick-off with an
in-person or virtual
meeting

Align on principles

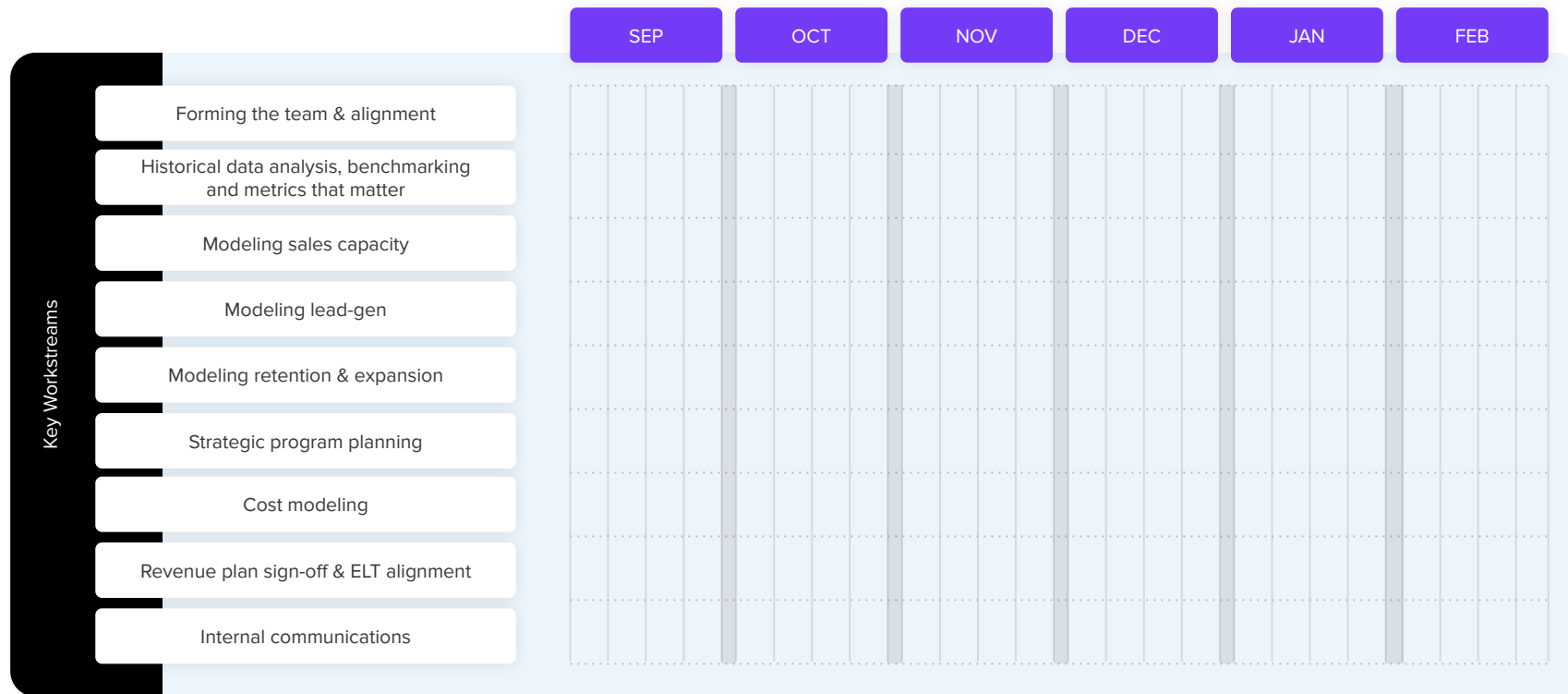
Agree on goals and
what good looks
like

Be clear on roles,
responsibilities and
expectations

Agree on
milestones and
ownership

Set-up the
appropriate
planning meetings

Building your project plan



Data analysis, benchmarking and **building** the revenue model

Aligning on your go-to-market model

PLG

INBOUND

ABM

Strategic
Accounts

The New Buyer's Experience & its impact on GTM

	Before AI	Today
PROCESS	Linear, stage-based (Awareness → Consideration → Decision)	Non-linear, signal-driven with AI identifying and responding to buyer behaviors across channels
INFORMATION	Controlled by vendors and analysts, and siloed across websites, sales reps, and PDFs	Consolidated and curated by AI from web, reviews, research and vendor content
INDICATORS	Form fills, email opens, MQL, traditional lead scoring	Behavioral signals from account based intent data, and predictive AI insights
SPEED	Vendor-led, slow research-to-response cycle and multiple handoffs	Buyer-determined, with instant access to decision making information via GPTs
PERSONALIZATION	Generic nurture sequences and retargeting with limited segmentation	Context aware AI tailored messaging , content, and CTAs based on intent scoring, ICP fit
TRUST	Built through sales interactions, vendor content, analysts and word of mouth	Earned: peer reviews, AI-cited sources, peer content, social influencers and networks

They are account oriented

While most have
thankfully moved
on from MQLs!

The best are:

- More likely to rank ABM as a top GTM strategy
- More mature to capitalize on Intent data & ABM platforms.

Inputs and assumptions

Product Led Growth

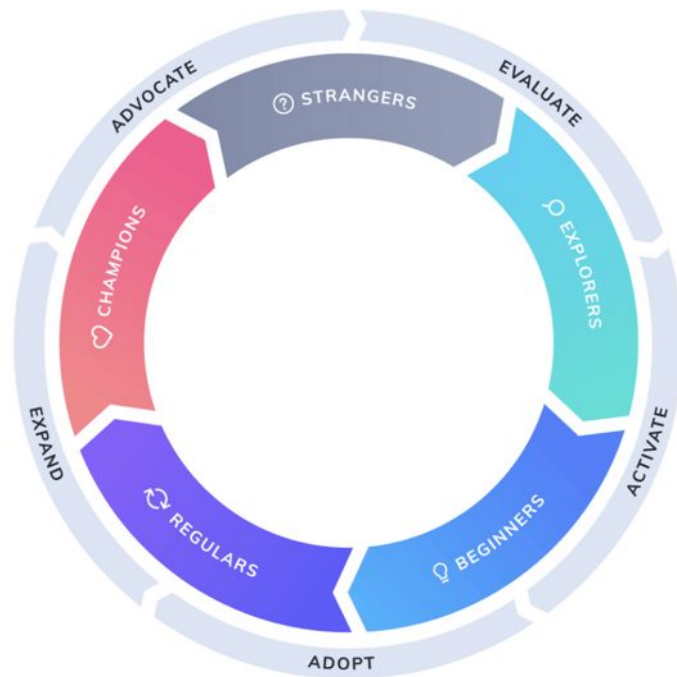
Acquisition

Activation

Revenue

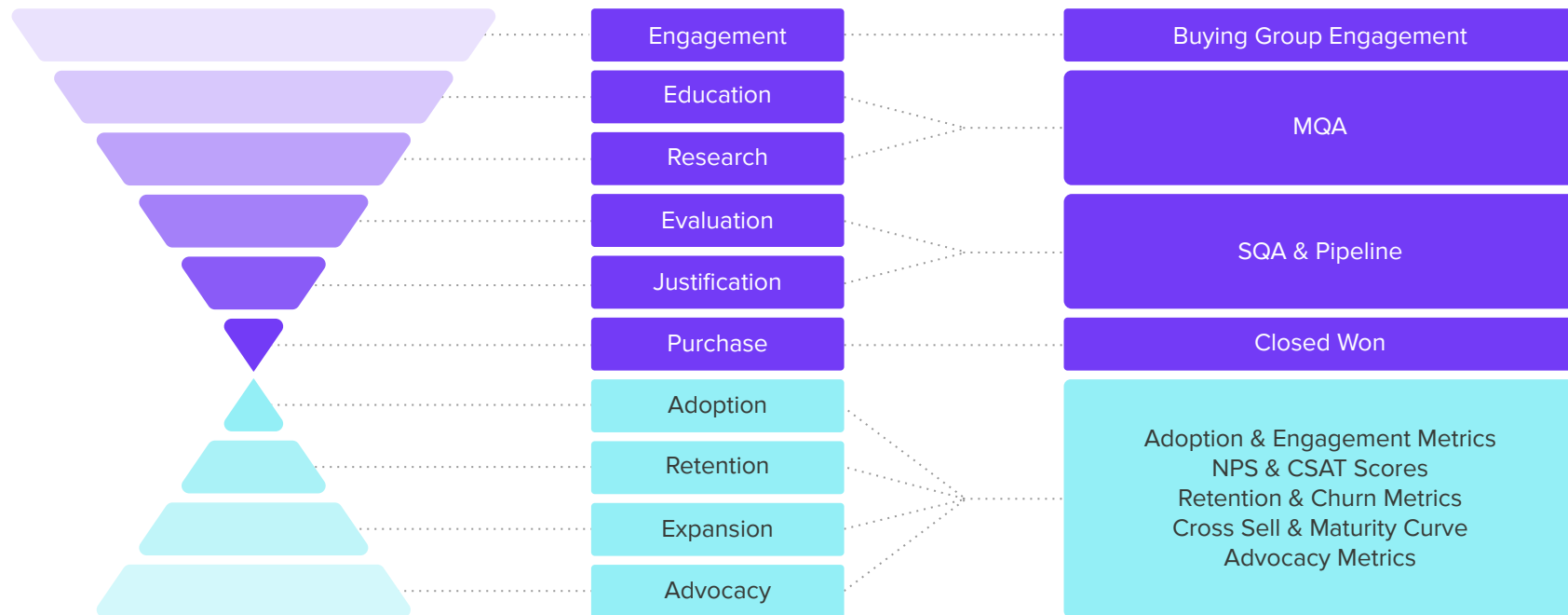
Retention

Referral



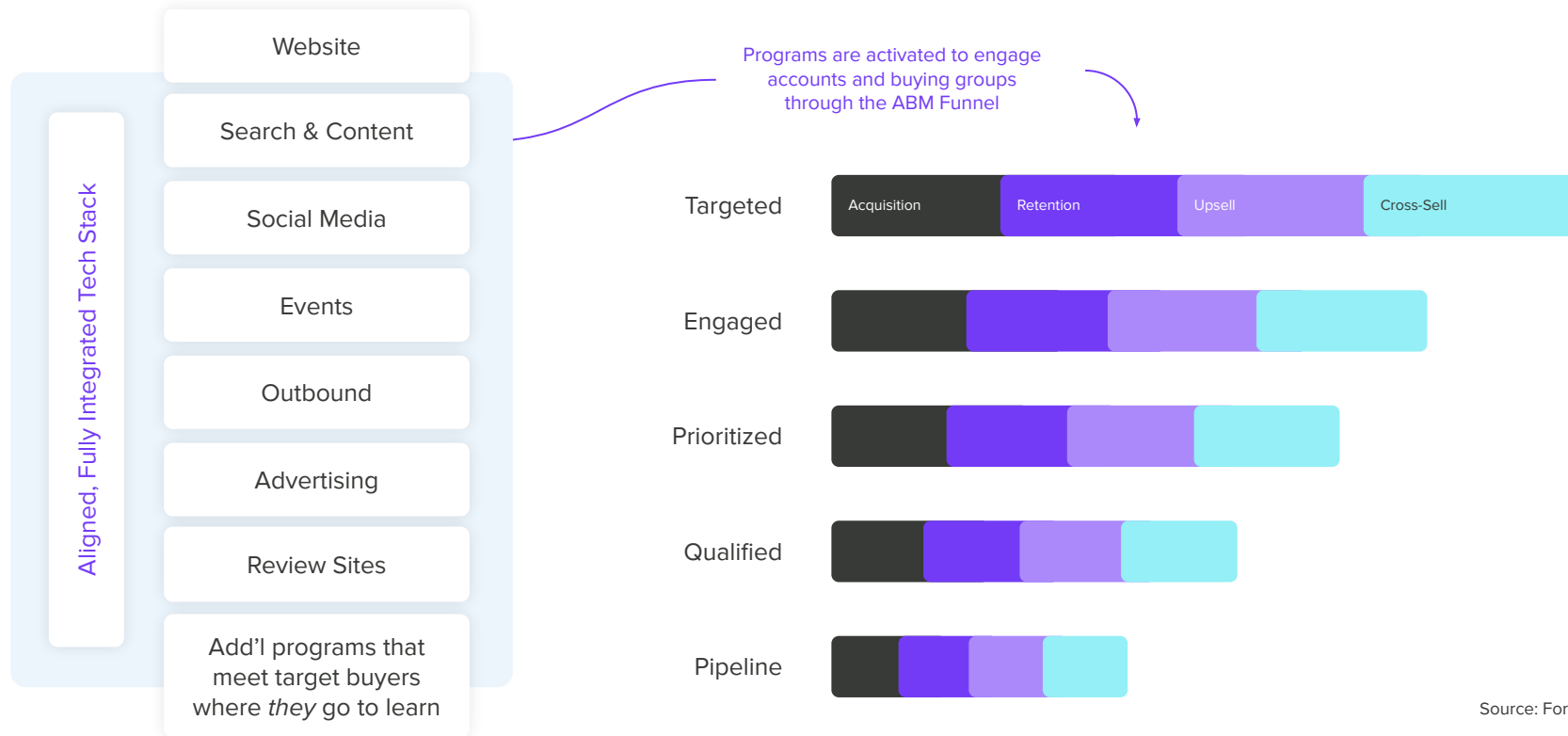
Inputs and assumptions

Inbound + outbound funnel

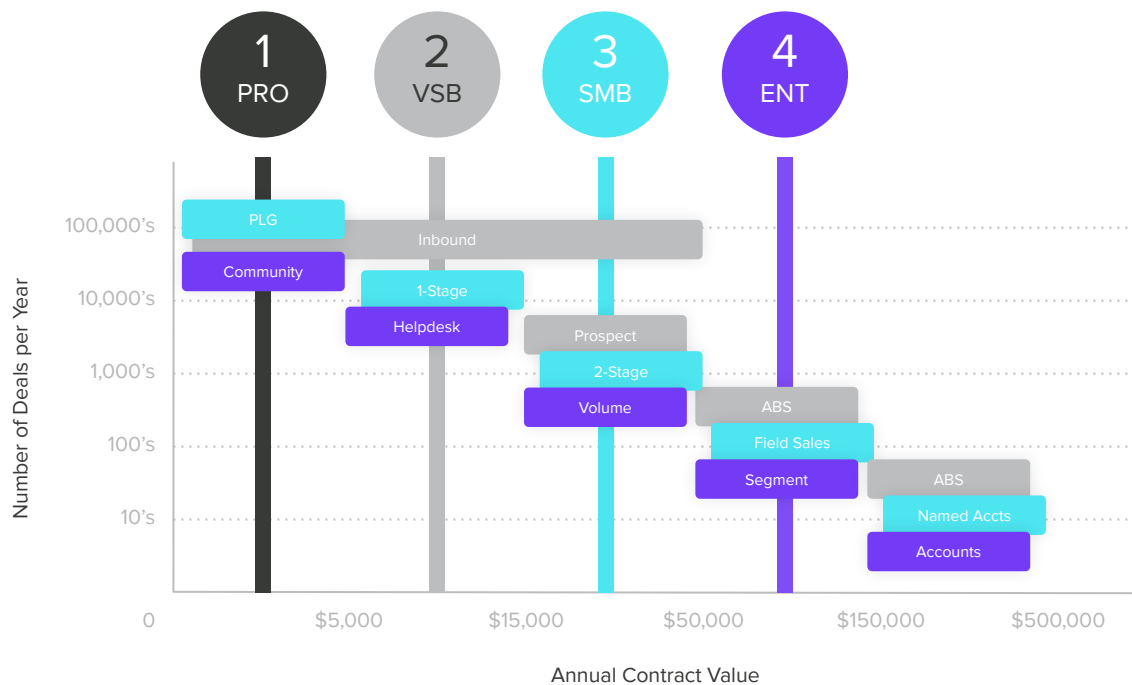


Inputs and assumptions

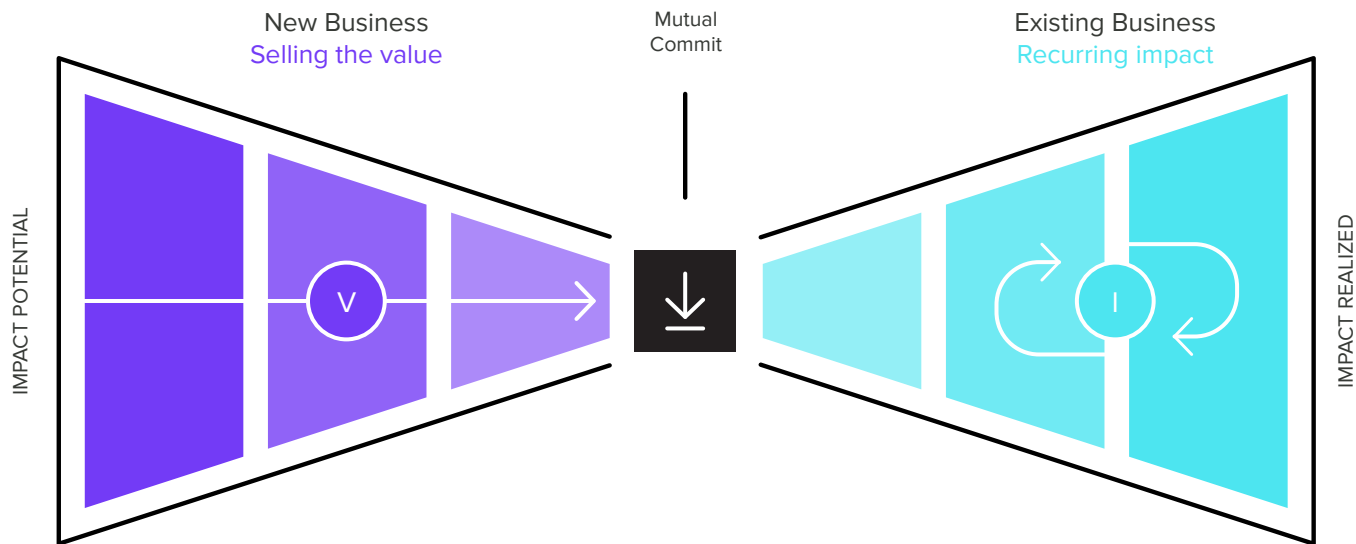
ABM/ Target accounts



Critical: Gaining go-to-market fit



Take a comprehensive view of your revenue growth



Our reporting found that:

60%

Of organizations
feel they are not
fully aligned on
metrics.

but

100%

Of **top-performers**
were confident and
aligned across their
metrics.

Coincidence?

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Historical data analysis & benchmarking

- Now you've aligned on the metrics that matter for your business. Do the historical analysis to understand your own benchmark data.
- Use industry benchmarks to help, but don't rely on benchmarking data that is not aligned to your GTM, company size, geography, etc...
- Leverage AI to automate, clean, predict and further segment your analysis.

Volume metrics

Time metrics

Conversion metrics

Expansion metrics

Now it's time to start modeling

Sales Capacity

Opportunity
Creation

Renewal &
Expansion

Renewal & expansion model

Based on Assumptions :

- Account management capacity + contract term
- Churn
- Upsell/ cross sell with retained customers

Insights delivered:

- How much renewal and expansion revenue will be generated by the team and supporting members

Part 1: Customer Revenue Renewal & Expansion Assumptions

# of Customers @ Model Start	1500
Annual Customer Retention Rate (%)	85.00%
Average Revenue Per Customer (ARPC)	\$50,000
Customer Expansion Revenue Rate %	15.00%

Account engagement & opportunity creation

Based on Assumptions:

- Account engagement
- Funnel Stages
- Conversion Rates
- Duration
- Average deal size

Insights delivered:

- How much pipeline and revenue will need to be generated through lead-generating and opportunity creation programs

Part 2: New Business Lead Gen Funnel Inputs			
% New Business Revenue from Channel 1	70%		
% New Business Revenue from Channel 2	10%		
% New Business Revenue from Channel 3	20%		
Stages in Revenue Funnel			
	Name	Full Name	
Stage 1	LEAD	Lead	
Stage 2	MQA	Marketing Qualified Account	
Stage 3	SQA	Sales Qualified Account	
Stage 4	OPP	Opportunities	
Stage 5	WON	Closed Won	
New Business Stage to Stage Conversion	Waterfall Conversion: Channel 1	Waterfall Conversion: Channel 2	Waterfall Conversion: Channel 3
LEAD→MQA	35.00%	35.00%	35.00%
MQA→SQA	40.00%	40.00%	40.00%
SQA→OPP	90.00%	90.00%	90.00%
OPP→WON	30.00%	30.00%	30.00%
Cummulative Funnel Win Rate	3.78%	3.78%	3.78%
ASP	\$65,000	\$70,000	\$60,000

Capacity modeling

Based on assumptions:

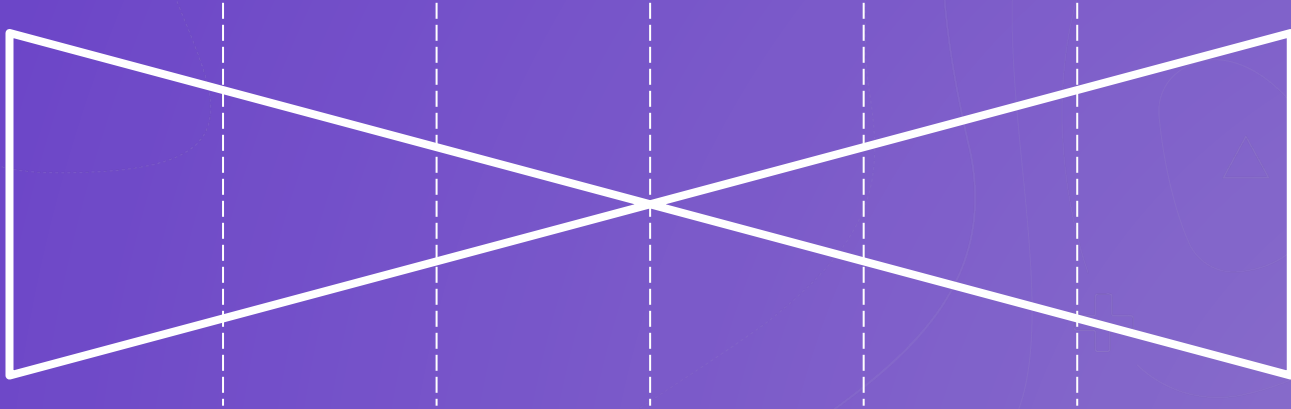
- Sales hiring and ramp
- Quota per sales person
- Avg quota achievement
- Average deal size
- Team structure

Insights delivered:

- How much revenue will be generated by the sales team, and how many supporting roles are needed to close the revenue.

Part 3: Revenue /Bookings Modeling & Hiring Inputs	
Total Annual Company Revenue Target	\$115,000,000
% Annual Revenue/Quota from New Business	34.9%
% Annual Revenue/Quota from Existing Business	65.1%
New Business ASP (\$)	\$65,000
Existing Business ASP (\$)	\$50,000
New Business Win Rate	30%
Existing Business Expansion Win Rate	50%
Avg Rep Annual New Business Bookings Quota	\$1,500,000
# of Reps per BDR	5
# of Reps per Sales Manager	8
Rep Average Months of ramp	3

Integrating the models to fuel an holistic revenue team plan



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Creating a **strategic** program plan
to support the revenue model

Strategic initiative planning

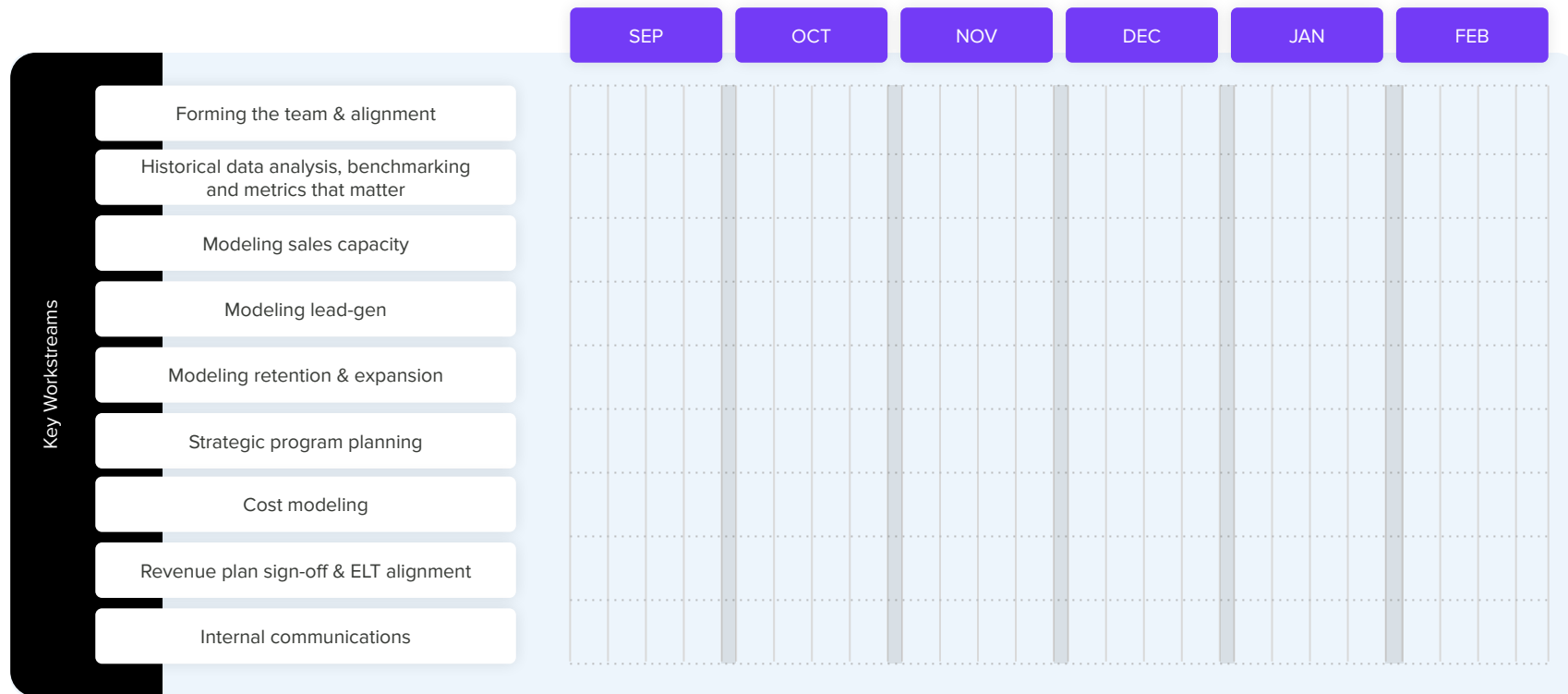
Identify key focus areas that will make the biggest impact on your revenue, and align your business leaders around those areas of impact.

Consider an OKR approach.

Tie strategic initiatives to the metrics that matter

STRATEGIC OBJECTIVE	Deliver the most customer value in the industry	Create durable demand with record breaking conversion rates	Achieve world-class win-rates
INITIATIVE	Create a predictive customer health scores to drive proactive customer connections	A cross functional ABM program focused on our best industries	Increase sales productivity through automation & AI agents
INVESTMENT	\$75,000	\$150,000	\$45,000
IMPACT ON METRIC	Increase net revenue retention by 5%	Drive \$3M in new business revenue from ABM efforts	Increase new business win-rates by 10%

Building your project plan



Understanding investments, ROI & **gaining** alignment with the CFO

Driving durable growth

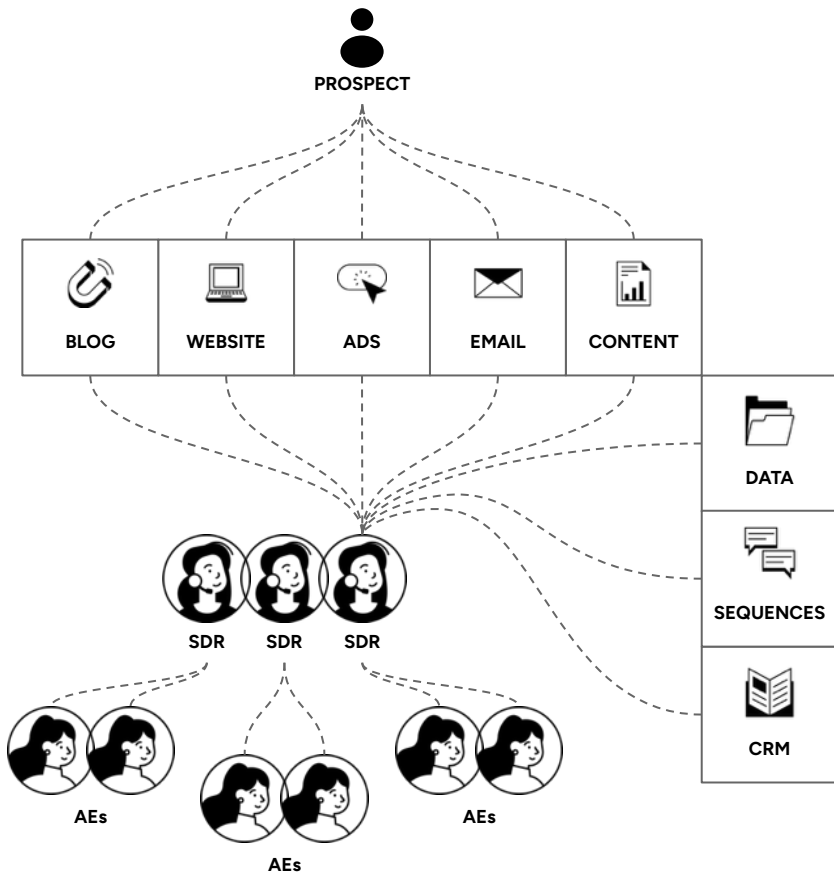
Being disciplined with the cost
to drive profitable growth

Do you have the resources it will
take to accomplish those goals?

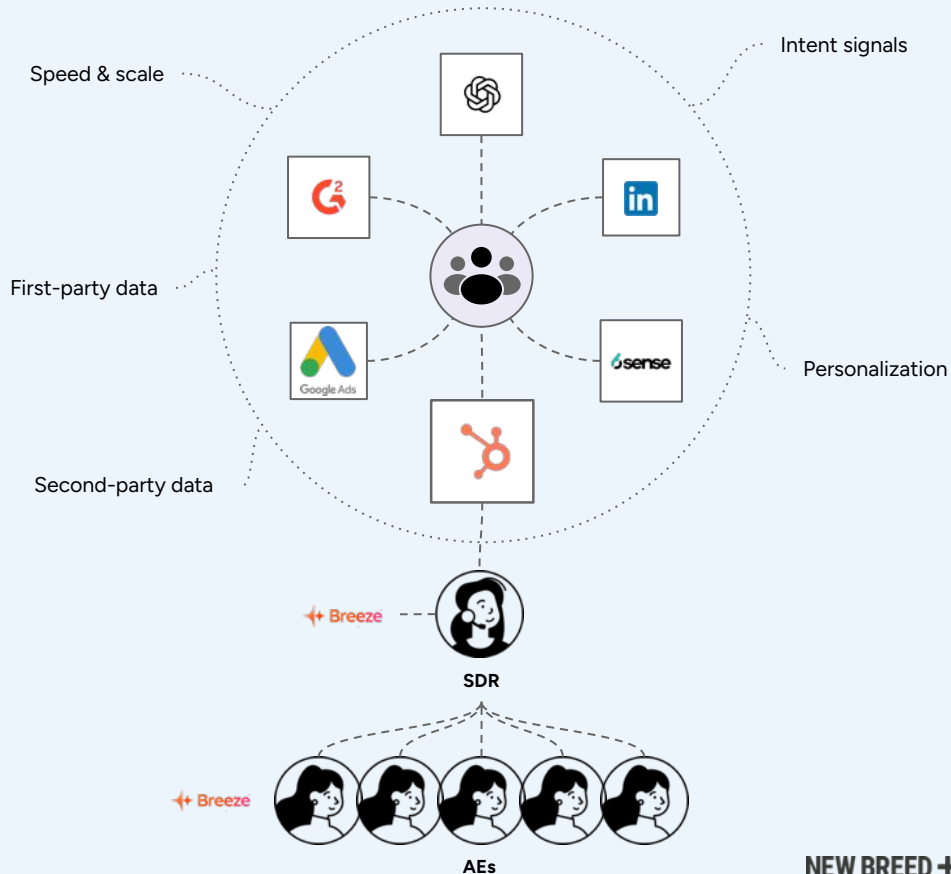
- People + Agents
- Programs
- Technology

What investments do you need to make to
impact your metrics that matter?

THE OLD, LINEAR JOURNEY



THE NEW, AI-FIRST JOURNEY



What is the impact of the investments on profitability of the organization?

Consider all operational expenses for a granular and realistic view of efficiency

CRR Ratio:

$$\left(\frac{\text{Cost of Revenue}}{\text{Total Revenue}} \right) \times 100$$

Negotiation with the CFO and executive buy in

- Partnership throughout
- Taking a profitable/
durable growth approach
- Make a sacrifice
- Focus on the bigger
picture and the biggest
impact



Aligning the organization



93%

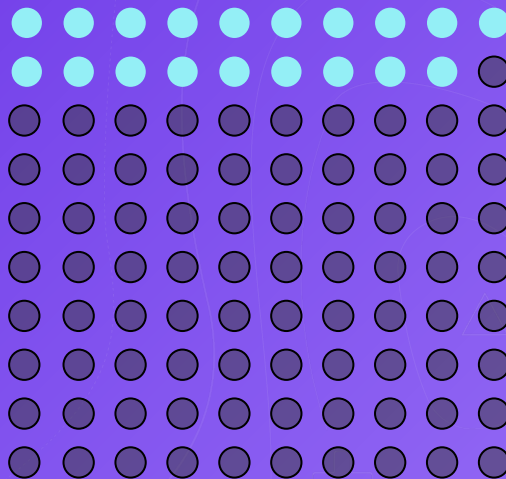
**of a company's employees do
not understand its strategy**

Source: PwC

only

19%

**of employees
feel completely
informed about
their employer's
corporate mission**



Communication principles to commit to during the planning process.

Consistency is key

Make it timely around key planning milestones

Transparency will help align the organization and create ownership

Company kick-off

Your time to create a WOW moment for your teams

Show your ELT
is alignment

Include members
of the team

Invest in the
content

Keep it human

Be clear &
transparent

Have fun

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Strategic planning principles

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Metrics Driven

Realistic,
Yet Challenging

Objective

Action Oriented

Let's get planning!

Download the planning template



Come find us
at Booth #67

in

Jonathan Burg
SVP Revenue

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UPCOMING SESSION

State of Hubspot: How the Best Do It Different

Thursday, September 4 | 10:45am - 11:15am PT | HubSpot Hero Stage



JONATHAN BURG
SVP Revenue, New Breed



KERRY CUNNINGHAM
Head of Research, 6sense



SYDNEY SLOAN
CMO, G2



CATHY MCPHILLIPS
CMO, SMARTERX

Thank you!

**Let's unlock
meaningful growth**

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Thank you!