RepAgentic

Know what's true about your go-to-market. Then fix it in the right order.

VERIFIED PLAN

Northgate Systems

Your go-to-market, verified from the inside, with every action dated and owned.

Prepared for	The Northgate leadership team
Prepared by	RepAgentic
Date	1 October 2026
Version	v4.12

Northgate Systems is an invented company. Every name, figure and finding is made up to show how RepAgentic works.

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Fix Market Reality first. Three fixes are worth AUD 0.9m to 2.0m a year once working, enough to close the AUD 1.1m gap to target at the high end. The low end does not close it alone.

Why

1. Market Reality is 50% Repair: opportunities won at 31% against 38% for 3PLs and freight forwarders, 100 to 1,000 staff. Worth AUD 0.5m to 1.1m a year.
2. Revenue Plan is 55% Repair: meetings accepted by the account executives at 68% against 76% for Inbound SDR. Worth AUD 238k to 494k a year.
3. Motions is 54% Repair: booked meetings that take place at 81% against 88% for Inbound SDR. Worth AUD 167k to 333k a year.

What happens next

Starts	Action	Working by
5 Oct 2026	**Target market** Market Reality; Megan Walsh (approves), Luis Ortega (maintains)	23 Nov 2026
5 Oct 2026	**Qualified account standard** Market Reality; Megan Walsh, Hannah Cho, Tom Reilly	23 Nov 2026
5 Oct 2026	**Meeting handover** Revenue Plan; Tom Reilly, Hannah Cho	30 Nov 2026

Starts 5 Oct 2026 **Check-in** 23 Nov 2026 **Ends** 17 May 2027 **190 hours** from your team

Decisions needed first

Small distributors (under 100 staff): in the target market or out. Megan Walsh, by 26 Oct 2026

Where the tier boundaries sit. Megan Walsh, by 26 Oct 2026

AI drafting on or off while the message standard is written. Megan Walsh, by 2 Nov 2026

What it is worth

AUD 0.9m to 2.0m a year at stake against a AUD 1.1m gap to target.

Motions	AUD 167k to 333k a year	working by 30 Nov 2026
Revenue Plan	AUD 238k to 494k a year	working by 4 Jan 2027
Market Reality	AUD 0.5m to 1.1m a year	working by 23 Nov 2026

Worked from your own sales figures; the workings are in the written plan.

How to read the rest

Who is accountable	pages 3 to 5
What it is worth	page 6
Account summary	page 7
One page per capability	pages 8 to 15
The written plan, with every action dated	from page 16

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Who is accountable for what. All 48 actions in this plan, from 5 Oct 2026 to 17 May 2027, grouped by capability. Each action names its owner on the capability pages; this page shows who carries each capability as a whole.

A Accountable: owns the result and signs the work off. One person per capability.

R Responsible: does the work.

C Consulted: their earlier work feeds this capability, so they are asked before it is final.

I Informed: told when each piece is done and working.

Capability	Actions	When	Hannah Cho SDR Team Lead	Luis Ortega Head of Marketing	Ben Tran Sales Operations Coordinator	Megan Walsh Chief Revenue Officer	Tom Reilly Senior Account Executive	Priya Nair Chief Financial Officer	Sam Whitford IT Manager	Sophie Martin People and Culture Lead	Daniel Okafor Chief Executive Officer
1. Market Reality Repair	5	5 Oct 2026 to 15 Feb 2027	R	R		A	R				I
2. Revenue Plan Repair	5	5 Oct 2026 to 15 Feb 2027	R		R	A	R				I
3. Team Design Optimise	6	19 Oct 2026 to 29 Mar 2027	R		R	A	C	R		R	R
4. Value Story Scale	5	5 Oct 2026 to 8 Mar 2027	R	A		I	R				I
5. Motions Repair	7	19 Oct 2026 to 12 Apr 2027	A	R	R	C	R				I
6. Rep Readiness Rebuild	6	16 Nov 2026 to 17 May 2027	A	C		R	C		R		I
7. Systems and Data Optimise	11	5 Oct 2026 to 17 May 2027	R	R	A	C	R	R	R		I
8. Metrics Repair	3	4 Jan 2027 to 12 Apr 2027			A	C		R			I
Hours on this plan			68 h	32 h	28 h	28 h	18 h	7 h	6 h	2 h	2 h
Busy on this plan until			19 Apr 2027	22 Feb 2027	15 Mar 2027	1 Mar 2027	19 Apr 2027	1 Feb 2027	18 Jan 2027	14 Dec 2026	9 Nov 2026

Built from the dated actions: the person who approves or leads most of a capability's actions is accountable for it; everyone else named on its actions is responsible. Change an owner on an action and this page changes with it.

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Northgate is at 59% Repair; Market Reality is the first area to fix

Outside-in read, 25-08-2026: **provisional Repair at 58%** (29 to 87% range, 35% of practices visible) → verified **59% Repair**. First area to fix moved from Team Design to Market Reality.

Confirmed: 8 of 48 practices | **Changed:** 13 of 48 practices | **Overturned:** 2 of 48 practices | **Seen only from inside:** 25 of 48 practices

Where you are now

113/192 59% Repair

First area to fix: Market Reality. **Lowest:** Rep Readiness (38%).

Later capabilities score higher but can't deliver fully until Market Reality is fixed.

Value at stake: AUD 0.9m to 2.0m a year at stake against a AUD 1.1m gap to target.

Plan and capacity

Starts 5 Oct 2026 **Check-in** 23 Nov 2026
Ends 17 May 2027

190 hours from your team, dated from the hours each person offered.

With the extra hours offered by Hannah Cho and Tom Reilly: ends 3 May 2027.

How to read this plan. One page per capability follows, in the order above: where you are, the next band and date, each gap linked to its action, and how you will know it is done and working.

Can the team self-start? 3 of 6 core roles in place. The team can start this plan itself: each gap below has a dated action or decision.

Stretched **SDR leader.** Hannah Cho also carries half a book of outbound accounts; the plan tests her stopping from January.

Interim **Revenue operations owner.** Named by 9 Nov 2026 (Team Design, action 1).

Missing **Enablement owner.** Decision for Megan Walsh by 30 Nov 2026 (Rep Readiness).

Eight capabilities at a glance

Capability	Now	Next band		First action
1. Market Reality First	50% Repair	Optimise	23 Nov 2026	Agree one market register from the FY26 win evidence: must-haves, exclusions, tiers and a dated owner. Megan Walsh (approves), Luis Ortega (maintains); by 26 Oct 2026
2. Revenue Plan	55% Repair	Optimise	4 Jan 2027	Write the handover standard with return grounds, and make the reason field required. Tom Reilly, Hannah Cho; by 2 Nov 2026
3. Team Design	67% Optimise	Scale	25 Jan 2027	Name a revenue operations owner and write the remit. Megan Walsh, Daniel Okafor; by 9 Nov 2026
4. Value Story	85% Scale	Scale	hold	Add Visibility and finance objections and the claim limits. Tom Reilly, Luis Ortega; by 25 Jan 2027
5. Motions	54% Repair	Optimise	30 Nov 2026	Write the message standard with claim limits and the AI draft rule. Luis Ortega, Hannah Cho; by 2 Nov 2026
6. Rep Readiness	38% Rebuild	Repair	11 Jan 2027	Add readiness checks and owners to the onboarding checklist before the October hire. Hannah Cho; by 30 Nov 2026
7. Systems and Data	66% Optimise	Scale	1 Feb 2027	Agree new-business definitions with finance and specify the single report. Priya Nair, Ben Tran; by 7 Dec 2026
8. Metrics	50% Repair	Optimise	8 Mar 2027	Write the contribution definitions and specify the pipeline and revenue report. Ben Tran, Priya Nair; by 18 Jan 2027

First weeks: what starts before the check-in

5 Oct 2026: Target market (Market Reality; Megan Walsh (approves), Luis Ortega (maintains))

5 Oct 2026: Qualified account standard (Market Reality; Megan Walsh, Hannah Cho, Tom Reilly)

5 Oct 2026: Meeting handover (Revenue Plan; Tom Reilly, Hannah Cho)

19 Oct 2026: Message standard (Motions; Luis Ortega, Hannah Cho)

19 Oct 2026: Revenue operations owner (Team Design; Megan Walsh, Daniel Okafor)

9 more start before the check-in; see the capability pages.

Roles and who does the work

Role	Held by	Status	Hours at h/wk	Done by
Revenue leader	Megan Walsh	In place	28 h at 2 h/wk	1 Mar 2027
Marketing leader	Luis Ortega	In place	32 h at 3 h/wk	22 Feb 2027
SDR leader	Hannah Cho	Stretched	68 h at 4 h/wk	19 Apr 2027
Revenue operations owner	Ben Tran	Interim	28 h at 4 h/wk	15 Mar 2027
Enablement owner	nobody	Missing	-	-
Sales manager or senior AE	Tom Reilly	In place	18 h at 1 h/wk	19 Apr 2027
Finance partner	Priya Nair	In place	7 h at 1 h/wk	1 Feb 2027
People partner	Sophie Martin	In place	2 h at 1 h/wk	14 Dec 2026
Executive approver	Daniel Okafor	In place	2 h at 0.5 h/wk	9 Nov 2026
Also in the plan	Sam Whitford		6 h at 1 h/wk	18 Jan 2027

Core roles above the line, supporting below. Colours follow the bands.

Decisions to make first

Small distributors (under 100 staff): in the target market or out. Megan Walsh, by 26 Oct 2026

Where the tier boundaries sit. Megan Walsh, by 26 Oct 2026

AI drafting on or off while the message standard is written. Megan Walsh, by 2 Nov 2026

Revenue operations remit for Ben Tran. Daniel Okafor, by 9 Nov 2026

5 more on the capability pages.

Where the GTM Build Pack helps

32 GTM Build Pack units match the actions in this plan, across 8 capabilities.

Each arrives configured with this plan's evidence and proposed drafts. The plan stands on its own without it.

Behind the capability pages: the full assessment, the dated action list and the one-tab register.

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Outside-in read, 25-08-2026: **63% from 2 of 5 practices visible** → verified **50% Repair**. The outside-in read pointed to Team Design as the first area to fix; the verified evidence starts here.

Confirmed: Target market, Ideal customer profile | **Seen only from inside:** Qualified account standard, Priority list rules, Buyer personas

Where you are now

10/20 50% **Repair** **First area to fix**

Northgate knows who its best customers are, but the business does not act on it. Two written market definitions disagree, the weekly SDR list follows the intent feed, and there is no written test for a qualified account. FY26 win rates show 3PLs, forwarders and distributors with 100 to 1,000 staff winning at 33 to 38%, and manufacturers at 9%.

Next band and date

Optimise by **23 Nov 2026**

Needs 13 of 20 points. The actions here reach 18 once each change is shown working. Dated from the hours your team offered.

The extra hours offered by Hannah Cho and Tom Reilly do not bring this forward.

Worth: AUD 0.5m to 1.1m a year once working (opportunities won).

What to keep

Target market: Keep the Marketing ICP one-pager v2 regional scope and the Sales pitch deck, 'Who we serve' slide 4 multi-site signal

Ideal customer profile: Keep the three existing persona sheets as inputs

Qualified account standard: Keep the SDR lead qualification checklist lead checklist

Priority list rules: Keep the weekly cadence and the intent feed as one input

Buyer personas: Keep the Buyer persona sheets: Operations Director, Warehouse Manager, IT Manager format; it is used

The gap and plan to bridge it

The gap	Plan to bridge it
1 **Target market:** One approved firmographic definition with must-haves, exclusions and tiers, used by marketing, SDRs and AEs.	Agree one market register from the FY26 win evidence: must-haves, exclusions, tiers and a dated owner. Megan Walsh (approves), Luis Ortega (maintains); by 26 Oct 2026; 8 h
2 **Qualified account standard:** A written qualified-account standard beside the lead standard: the unit judged, qualifying and disqualifying evidence, owner, next step and where it is captured.	Write the account standard next to the existing lead checklist and test it on recent returned meetings. Megan Walsh, Hannah Cho, Tom Reilly; by 26 Oct 2026; 6 h
3 **Ideal customer profile:** A written buying-role map for each priority segment: who initiates, evaluates, approves and can block.	Build the buying-role map from FY26 wins and losses and add the role field to the handover. Luis Ortega with Tom Reilly; by 7 Dec 2026; 6 h
4 **Priority list rules:** Written priority rules that any person can state, the same as the rules the list is built from, with an owner and review date.	Write the priority rules after the market register and account standard are agreed, then rebuild the weekly list from them. Hannah Cho (owner), Megan Walsh (approves); by 16 Nov 2026; 5 h
5 **Buyer personas:** Buyer guides for every key role, sourced from customer conversations and dated.	Update the three guides and add Finance approver and Freight Manager guides from customer interviews. Luis Ortega; by 18 Jan 2027; 8 h

Decisions to make first

Small distributors (under 100 staff): in the target market or out. Megan Walsh decides, by 26 Oct 2026

Where the tier boundaries sit. Megan Walsh decides, by 26 Oct 2026

What implementation partners are called in the buying-role map. Luis Ortega decides, by 7 Dec 2026

How accounts held by AEs are treated on the SDR list. Megan Walsh decides, by 16 Nov 2026

Depends on

Depends on: nothing earlier. This is where the work starts.

Holds up: Revenue Plan, Team Design, Value Story, Motions, Rep Readiness, Systems and Data

These score higher but cannot deliver fully until this is fixed.

Done when / working when

1 Market register approved by Megan Walsh and dated. **Working:** Four weekly lists built only from register tiers; AE acceptance recorded against tier, by 23 Nov 2026

2 Account standard written beside the lead checklist and approved. **Working:** Two-reviewer case test agrees on 8 of 10 cases; return reasons recorded against the standard for 30 days, by 23 Nov 2026

3 Buying-role map approved for 3PL, forwarder and distributor deals. **Working:** Role field completed on 80% of new opportunities for 30 days, by 18 Jan 2027

4 Priority rules written with owner and review date. **Working:** Every account on four consecutive Monday lists has a recorded rule reason, by 14 Dec 2026

5 Five buyer guides dated and sourced. **Working:** Guides used in call preparation, sampled in coaching for 30 days, by 15 Feb 2027

Where the GTM Build Pack helps

Target market and qualified account: Market register with firmographic tiers; lead standard and account standard side by side; qualified account matrix.

Buyer roles and personas: Buyer-role map and a persona canvas for each priority role, linked to buying stage.

Priority rules: Written priority rules any person can state without opening a platform, with an owner and review date.

Arrives configured with this page's evidence and proposed drafts. This page stands on its own without it.

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Outside-in read, 25-08-2026: **75% from 2 of 7 practices visible** → verified **54% Repair**.

Confirmed: Nurture for not-ready buyers | **Changed:** Social play | **Seen only from inside:** Multi-touch campaigns, Pre-touch research, Phone play, Message standard, Call practice

Where you are now

15/28 54% Repair

Sequences and a call guide operate, but there is no message standard, no research standard and no practice program, and AI drafting is used without rules. Not-ready buyers join one general newsletter with no return rule.

Next band and date

Optimise by **30 Nov 2026**

Needs 17 of 28 points. The actions here reach 24 once each change is shown working. Dated from the hours your team offered.

The extra hours offered by Hannah Cho and Tom Reilly do not bring this forward.

Worth: AUD 167k to 333k a year once working (booked meetings that take place).

What to keep

Multi-touch campaigns: Keep the three sequences

Pre-touch research: Keep the roadmap item and owner

Phone play: Keep the opener and talk track

Message standard: Use the Messaging house and value proposition as the source of approved claims

Social play: Keep the Employee social media guidelines brand rules

2 more in the full assessment behind these pages.

The gap and plan to bridge it

The gap	Plan to bridge it
1 **Message standard:** A written message standard per buyer stage: must include, must never claim, approver, and the same rules for AI drafts.	Write the message standard with claim limits and the AI draft rule. Luis Ortega, Hannah Cho; by 2 Nov 2026; 5 h
2 **Pre-touch research:** A pre-touch research standard with required facts, sources, verification and a checker.	Write the research standard, including checks on tool-prepared research. Hannah Cho; by 11 Jan 2027; 4 h
3 **Phone play:** A phone play with role variants and a defined next action for every outcome.	Extend the call guide with role variants and outcome actions. Hannah Cho; by 15 Feb 2027; 3 h
4 **Call practice:** A practice program with scenarios, a pass standard and assessors.	Build the practice program with a scored pass standard. Hannah Cho, Tom Reilly; by 22 Feb 2027; 6 h
5 **Multi-touch campaigns:** A written campaign design marking which steps run without a person, with stop rules.	Document the campaign with attended and unattended steps marked. Hannah Cho, Ben Tran; by 15 Feb 2027; 3 h

Also in the dated plan: 6 Nurture for not-ready buyers (by 22 Feb 2027); 7 Social play (by 15 Mar 2027).

Decisions to make first

AI drafting on or off while the message standard is written.
Megan Walsh decides, by 2 Nov 2026

Depends on

Depends on: Market Reality, Value Story

Holds up: Rep Readiness, Systems and Data

Stretched **SDR leader.** Hannah Cho also carries half a book of outbound accounts; the plan tests her stopping from January.

Done when / working when

1 Message standard per stage approved by Luis Ortega. **Working:** Weekly sample of sent messages passes the standard, by 30 Nov 2026

2 Research standard approved. **Working:** Research sample checked weekly for four weeks, by 8 Feb 2027

3 Phone play with role variants and outcome actions. **Working:** Outcome codes used on 90% of calls for 30 days, by 15 Mar 2027

4 Practice program with pass standard. **Working:** October hire passes before independent calling, by 22 Mar 2027

5 Campaign design with unattended steps marked. **Working:** Sequences match the design on review, by 15 Mar 2027

Actions 6 and 7 are in the dated action list behind these pages.

Where the GTM Build Pack helps

Campaign and research standard: Multi-touch campaign with attended and unattended steps marked, and the pre-touch research standard.

Phone and social plays: Phone play and social play with preparation, openings, questions and capture.

Message standard: Message standard for each buyer stage with a named approver.

Practice program: Role-play pack with scenarios, rubric and result log.

Plus nurture program.

Arrives configured with this page's evidence and proposed drafts. This page stands on its own without it.

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Fixed dates the plan works around

Date	Event
20 Oct 2026	October SDR starts (Sydney)
25 Nov 2026	Board meeting
31 Dec 2026	Intent feed contract ends
18 Jan 2027	NZ SDR starts
24 Feb 2027	Board meeting
21 Dec 2026 to 5 Jan 2027	Christmas close: no plan hours

Progress check-in: 23 Nov 2026

One session of up to 60 minutes on the date Market Reality is planned to reach its next band. It reviews progress and blockers against these dates. It is a progress review, not a reassessment.

Actions in date order

#	Action	Owner and hours	Dates	Done when	Working when
1	**Market Reality: target market.** Agree one market register from the FY26 win evidence: must-haves, exclusions, tiers and a dated owner.	Megan Walsh (approves), Luis Ortega (maintains); 8 h	Start 5 Oct 2026; done 26 Oct 2026; working 23 Nov 2026	Market register approved by Megan Walsh and dated	Four weekly lists built only from register tiers; AE acceptance recorded against tier
2	**Market Reality: qualified account standard.** Write the account standard next to the existing lead checklist and test it on recent returned meetings.	Megan Walsh, Hannah Cho, Tom Reilly; 6 h	Start 5 Oct 2026; done 26 Oct 2026; working 23 Nov 2026	Account standard written beside the lead checklist and approved	Two-reviewer case test agrees on 8 of 10 cases; return reasons recorded against the standard for 30 days
3	**Revenue Plan: meeting handover.** Write the handover standard with return grounds, and make the reason field required.	Tom Reilly, Hannah Cho; 4 h	Start 5 Oct 2026; done 2 Nov 2026; working 30 Nov 2026	Handover standard approved; return reason required	All returns in 30 days carry a standard reason
4	**Systems and Data: sending infrastructure.** Kept as is; recheck before the two new SDRs add volume.	Sam Whitford; 1 h	Start 5 Oct 2026; done 12 Oct 2026; working 12 Oct 2026	Recheck before new SDR volume	Still in use at the next review
5	**Value Story: value proposition.**	Luis Ortega; 0 h	Start 5 Oct 2026; done 5 Oct	Kept as is	Still in use at the next review

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WHAT COMES NEXT

Start with a free Outside-In Read

This example shows what RepAgentic produces. Your own read starts from your public record, at no cost and with no obligation: where your go-to-market stands, the first area to fix and the questions that settle it.

Email

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This is a public sample: 7 of the plan's 47 pages. The full Verified Plan, with every capability, the dated actions and the value worked out, is walked through in a meeting.

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