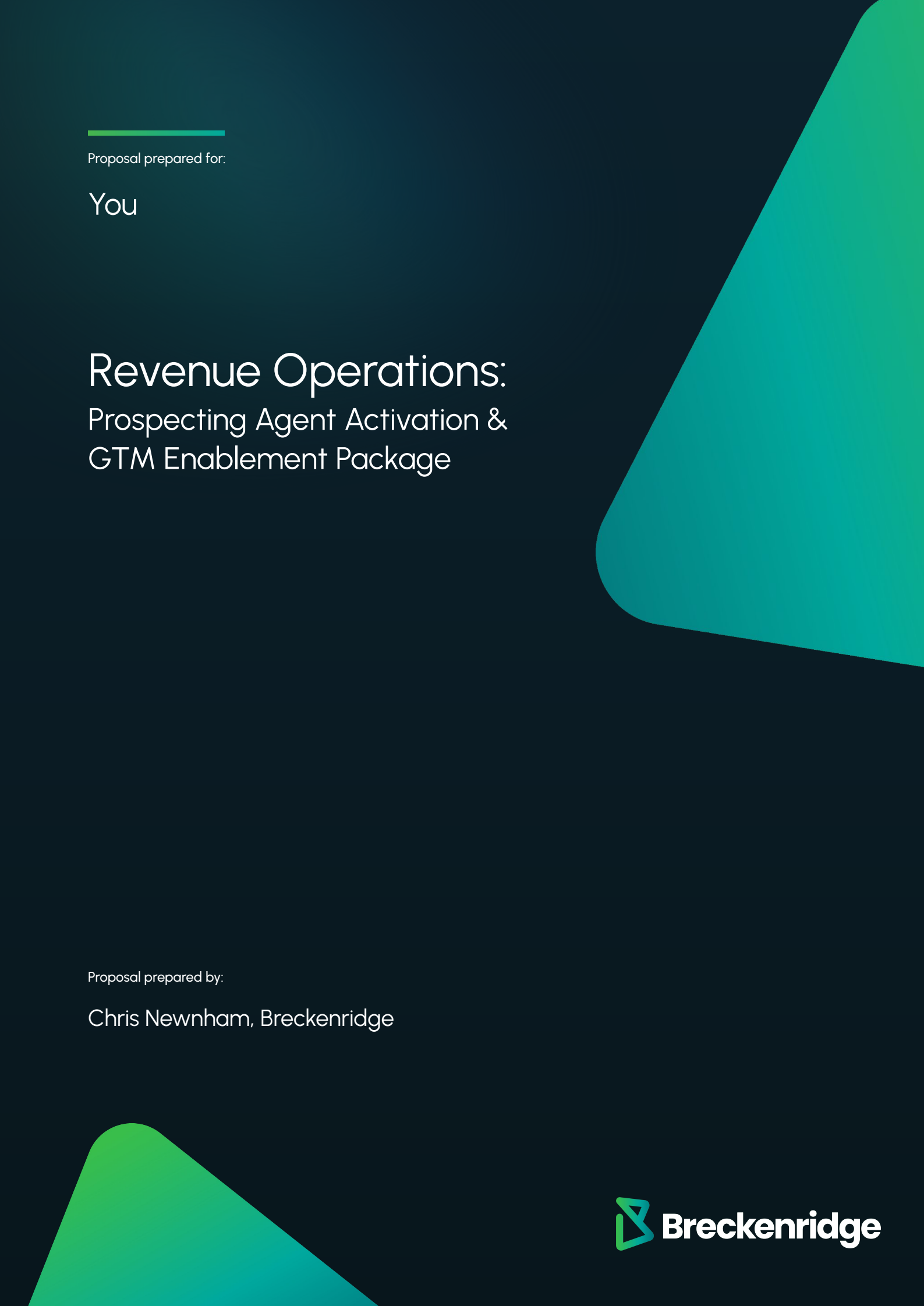




Proposal prepared for:

You

Revenue Operations: Prospecting Agent Activation & GTM Enablement Package

Proposal prepared by:

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Executive Summary

Context & Background

Over the past few years the way buyers make decisions has changed, here's the uncomfortable truth.

- The traditional marketing funnel is dead
- Spray and pray tactics don't work
- The buying committee has expanded
- Decision makers are exhausted by AI slop
- Most GTM teams are only focussing on net new acquisition
- Sales teams waste time on prospects that will never convert

Between trigger and purchase, buyers loop endlessly between exploring options and evaluating them, across a web of touchpoints that differs for every person.

You can't force a buyer down a funnel. You can only be present, relevant and useful when they surface and show intent.

Which means the real questions are:

- 1) How do you know when someone has entered the loop?
- 2) And furthermore how do we engage and nurture those with the highest propensity to convert?

This is where the Prospecting Agent comes in...

An AI SDR that lives inside HubSpot.

It monitors the companies you point it at, researches them continuously, and turns buying signals into outreach that's ready for review.

- **Monitors** your target segments 24/7 for buying signals, no more manual desk research
- **Recommends** companies with a 'reason to reach out' attached
- **Sources** suggested key decision makers at each account that match your target personas
- **Drafts** personalised outreach based on everything it knows about them and you waiting for your review



The promised land (what success looks like after 3 months)

This document outlines the delivery of a GTM engine that works harder for you and your business.

"We share a belief that the next generation of GTM will be built by people and agents working as one system. Agents carry context and learning from outcomes, and people bring judgment, taste, and empathy." ~ **Max Greenwald** · Co-founder & CEO, Warmly

Everyone wins, what success looks like:

Team	Outcome
For Account Managers	Account maps and growth plans live in HubSpot with expansion signals and account-level alerts surfacing the next best conversation automatically.
For Sales Teams	The AI Prospecting Agent co-working with the team, monitoring target accounts, movers and former clients for signals, and drafting personalised outreach for review. Sequences live, hygiene rules applied, speed-to-lead SLAs in place.
For Marketing Teams	Aligned lifecycle definitions, closed-loop handoffs, and campaign activity feeding directly into prospecting plays and nurture flows.
For Leadership	Monthly visibility of pipeline health and H2 progress, and a prioritised roadmap that compounds a GTM motion that scales without growing headcount.



Our Approach: Programme Overview

Format

A monthly consultative cadence rather than a one-off intervention ensures team adoption and allows for variation and testing. Each month combines a consultative strategy session, hands-on workflow and implementation support inside the portal, and enablement so the team builds muscle memory as the GTM system grows.

Duration	3 months. x2 1hr consultative sessions per month plus implementation support between sessions.
Audience	Sales team, account managers and marketing, with a monthly leadership check-in on progress and pipeline.
Prerequisites	Each participant to have HubSpot access. Breckenridge will conduct a portal and data review ahead of Month 1 to tailor the programme to live data.
Delivery	Led by Breckenridge with supporting specialists, materials and setup guides provided throughout.

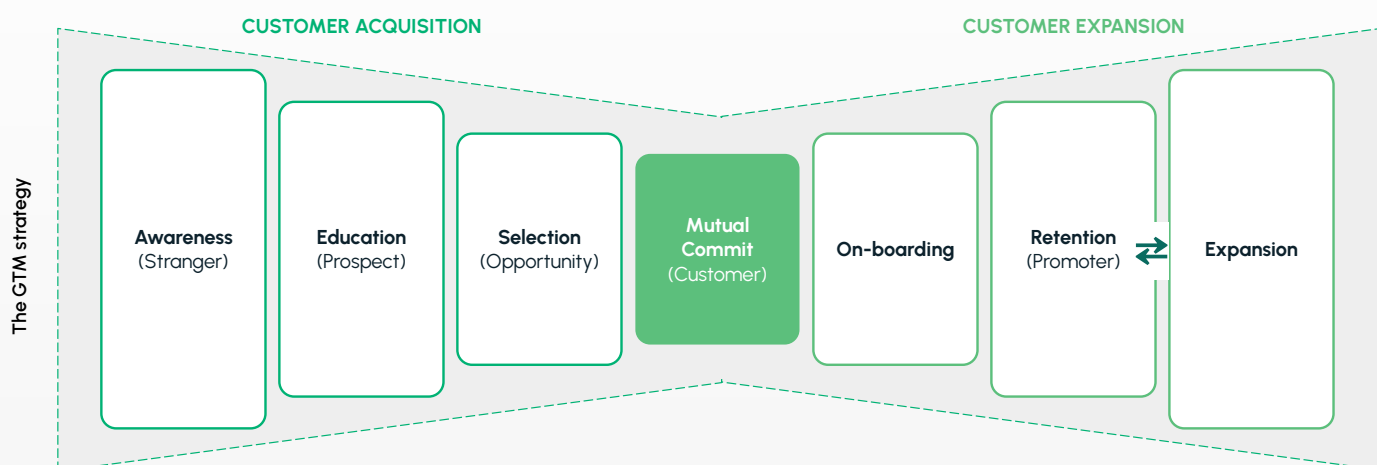


What We'll Cover in Detail

Month 1: GTM Process Mapping across the Bow Tie

Rather than forcing buyers down a funnel, we align sales, marketing and account management around one reciprocal GTM motion (the bow tie) focusing on three key stages: awareness, prospecting and expansion.

- **Mapping the awareness stage:** defining ICP, personas and target segments, and the signals (research intent, funding, job changes, growth) that tell us a stranger has entered the loop
- **Mapping the prospecting stage:** codifying the team's outreach plays, campaigns, movers, leavers, participants & lookalikes into a documented plays framework with routing, owners and SLAs
- **Mapping the expansion stage:** account mapping for the largest clients, expansion signals, re-engagement triggers for dormant and former customers
- **Documenting the workflow:** signals → plays → Prospecting Agent → sequences → human escalation. One blueprint the whole team works from



Revenue doesn't stop at the deal, the right side of the bowtie feeds the left with expansion, advocacy and re-activation signals

What We'll Cover in Detail

Month 2: Activating the Prospecting Agent

This directly addresses the missing signals and intent layer. An AI SDR inside HubSpot that monitors the companies we point it at, researches them continuously, and turns buying signals into outreach ready for the team's review.

- **Buyer intent & signals:** monitor target accounts, former clients and lookalikes for research intent, visitor intent, job changes, funding and growth signals (the 'why now' the current outreach is missing).
- **Apollo enrichment:** source the buying committee automatically — matching target personas and enriching missing decision-makers
- **Three plays, one engine:** net-new target accounts > research, signal & intent > re-activation of lapsed and former clients (including movers and leavers, automated)
- **Adaptive sequences:** personalised multi-step outreach drafted per contact, per signal, reviewed and approved by the team before anything sends
- **Trust & control:** daily limits, exclusion lists and review queues, the agent co-works with the SDRs, it doesn't replace them





What We'll Cover in Detail

Month 3: Sales Consultancy, Workflow & Implementation Support

Ongoing, hands-on support to fix the pipeline hygiene issues costing the business high-value wins and to keep the system improving month on month.

- **Enforce deal hygiene rules:** every active deal must have a next task, updated close date and stage-exit criteria, starting with the open deals due to close this quarter
- **Set up SLA alerts** so leads are never left uncontacted for more than 24 hours
- **Fix lifecycle clarity:** aligned definitions (resolving SQL = 'Cold') so reporting and handoffs mean the same thing to everyone
- **Build dashboards:** pipeline health, play performance and account expansion metrics for the monthly leadership check-in
- **Monthly consultancy:** a standing session to review results, unblock the team, prioritise next plays and keep the roadmap moving



Outcomes, not outputs.

The compounding advantage: because the agent lives inside HubSpot, it learns from your closed-won data, which signals convert, which messages land and gets sharper every quarter.

2×

More meetings booked by teams using Prospecting Agent*

8%

Email response rates – double the ~4% cold benchmark*

90%+

'Humanity score' on AI emails drafted with full CRM context*

Keep reading to find out how we can help...



The 3-Month Roadmap

Indicative milestones

The programme is structured across three monthly cycles, each with a distinct focus, building on the last. Each month isn't explicit, more indicative milestones to maintain focus.

Month	Focus	What We'll Do
Month 1	GTM Process Mapping across the Bow Tie	Rather than forcing buyers down a funnel, we align sales, marketing and account management around one reciprocal GTM motion (the bow tie) focusing on three key stages: awareness, prospecting and expansion. We'll start with an initial pipeline review and portal audit.
Month 2	Activating the Prospecting Agent	This directly addresses the activation of signals and intent layer. An AI SDR inside HubSpot that monitors the companies we point it at, researches them continuously, and turns buying signals into outreach ready for the team's review.
Month 3	Sales Consultancy, Workflow & Implementation Support	Ongoing, hands-on support to fix the pipeline hygiene issues costing the business high-value wins and to keep the system improving month on month.

Note: Each month includes the consultative session, hands-on implementation support between sessions, and support from the Breckenridge team. Focus areas will flex to the team's priorities and live results.



A roadmap to success

Budget and resource allocation

The investment below covers the full 3-month programme to build, implement, activate, train and optimise the prospecting agent to drive pipeline opportunities to your GTM teams.

Workstream	Description	Budget
Monthly Consultancy & GTM Strategy	Two 1hr consultative strategy sessions per month including an in person mapping session to start, initial portal review, roadmap ownership, and a monthly leadership check-in on pipeline and progress.	Included
Workflow & Implementation Support	Hands-on configuration between sessions: GTM process mapping, buyer intent, Prospecting Agent & Apollo setup and configuration, sequences, automations, dashboards.	Included
Training & Enablement	Working sessions with sales, account management and marketing to embed adoption, setup guides and playbook documentation provided throughout.	Included
Invoice terms: 30 days net		£1,500 / month
Apollo	We recommend an Apollo license for the purpose of building out & syncing key contacts into HubSpot	£50/ month est.
Breeze Credits	We also recommend increasing the breeze credits license to 10,000 credits per month	£45/ month est.



Additional support (Optional)

For teams who want to go further during the programme, additional workstreams are available at our existing-client rate:

Additional Breeze AI agent activation	(e.g. Data Agent, Customer Agent): strategy consult, hands-on activation and team training	£750 per agent (reduced from £1,000)
Additional in-person workshop days	(e.g. a full-day sales & marketing enablement workshop as originally proposed)	£1,500 per day

These align with our broader RevOps programmes and could be bundled if applicable.



About Breckenridge.

- ▶ We are a Diamond HubSpot Partner.
- ▶ We specialise in customer-focused onboardings, implementations and integrations. We also offer team training and ongoing support & portal management.
- ▶ We hold certifications in:
HubSpot Trainer • Sales Hub • Marketing Hub • Service Hub •
Data Integrations • Guided Client Onboardings • CRM Data Migration •
Revenue Operations • AI Essentials • Salesforce Integration •
and many more...

Our methodology.

Every project outcome is tailored to the client needs. Our process combines deep HubSpot expertise with a human-led change management approach to **drive real adoption and lasting impact for the client.**

Why we're different.

Human first Revenue Operations

We take a people-first approach to Revenue Operations within HubSpot – ensuring user adoption, alignment, and long-term utilisation across every project. We recognise that while technology enables growth, it's the human element of change management that makes it sustainable.

Deep dive discovery reduces time to impact

Our differentiation lies in our diagnostic-to-prescriptive methodology. Through our in-depth Discovery process, we identify operational friction, map the full customer journey (from stranger to promoter), and design systems that align sales, marketing, and service around a single source of truth. This Customer Journey Mapping Workshop becomes the blueprint for scalable, cross-functional success and enables us to close the time to impact gap.

In-person user adoption

We deliver transformation in person wherever possible – facilitating workshops, training sessions, and enablement designed to bring teams with us, not leave them behind. Our consultancy-led support packages evolve with the client, embedding RevOps as an operational mindset rather than a one-off implementation.

Technology enablement

Technically, we blend HubSpot expertise with smart automation using n8n, AI, and custom integrations, giving clients a tailored RevOps framework powered by data, not dogma.

In short, we're not just system builders; we're adoption architects, combining operational excellence with a deep understanding of people and process to unlock scalable growth in HubSpot.



Key personnel & contacts.

If you have any questions or queries about your project, our proposal, or would simply like some further information then please reach out to one of our team.



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Brands that have put their trust in us include:

i! matchtech

in • ni

yotspot
yachting opportunities & training

PB ASHER
DIESEL ENGINE SERVICES

VTCT Skills

dbstructural
ENGINEERING DIFFERENTLY

ACCELERCOMM
SUPERCHARGED WIRELESS

Inland and Coastal
Marina Systems

OSKA

WOW

Phew!

Planglow

FORTH

McINTYRE
GROUP

SEALPAC UK
6 Partners

ROCCABELLA
YACHTS

**WILL IT
MAKE THE
BOAT GO
FASTER?**

**Drawing
and Talking**

**the
marketing
centre**

Likezero

Altuent.

helix
GEOSPACE

CINERGI
intelligent energy solutions

PrecisionLifts
A Member of Anlev Elevator Group

Complete

Stannah

EDTC

MODSAFE

LABL.IT

SiriusInsight

life on time

Artemis
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SimplyPhi

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Psychology Clinic

SOLENT POWER



Thank you for your time.



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