



Execution Blueprint Samples

Selected examples across Marketing, Sales and Technology

About These Examples

A complete TalentOracle Execution Blueprint contains 19 structured sections, covering the role, ownership, KPIs, candidate criteria, business readiness, risks and 30 / 60 / 90-day execution plan.

To keep this sample pack concise, we have selected a small number of representative pages from three fictional Blueprint examples. These pages are designed to show the structure, strategic depth and commercial thinking behind the full deliverable.

Client work is confidential, so the companies and scenarios shown here are fictional. Every Blueprint is tailored to the client's business, priorities, available data and recommended capability.



TalentOracle

Execution Blueprint

EXECUTION CAPABILITY PLAN

Aster & Row

Senior Performance Marketing Specialist

SELECTED PAGES FROM A 19-SECTION EXECUTION BLUEPRINT

DECISION VIEW

1. Executive Summary

Aster & Row has a functioning paid-acquisition engine, but it does not have a single commercially accountable owner. Meta and Google are already material growth channels, the business has usable tracking, more than 18 months of account history, available creative and developer support, and fulfilment capacity above current order volume. The execution gap is specialist ownership: budget decisions are reactive, testing is inconsistent, platform reporting is not consistently connected to contribution economics, and the Founder remains pulled into routine decisions.

The recommended capability is a Senior Performance Marketing Specialist operating as a hands-on individual contributor. The specialist should directly own Meta and Google execution, budget allocation within agreed limits, structured creative and landing-page testing, paid-acquisition reporting, and the weekly commercial decision loop. The role should not become another management layer between the business and an agency.

The 90-day commercial objective is to increase the final full calendar month's Shopify net revenue by at least 10% from the AED 552,000 trailing three-month baseline to at least AED 607,200, while protecting approximately AED 133,000 monthly contribution under normal trading conditions. The role should initially operate around the AED 150,000 monthly media baseline, with freedom to reallocate spend and authority to increase total media up to AED 165,000 only where evidence supports the decision.

Recommended delivery

Dedicated remote Senior Performance Marketing Specialist with at least five dependable hours of UAE-day overlap, embedded with Aster & Row and accountable for direct account execution. A managed specialist model is recommended for speed and continuity, but the operating design - one accountable owner, clear authority, direct access and no long-term dual ownership - is more important than the employment vehicle.

Executive Decision Summary

Business need	Create one accountable owner for profitable paid customer acquisition and remove Founder dependence from day-to-day media decisions.
Capability	Senior Performance Marketing Specialist - hands-on Meta and Google ecommerce acquisition.
Seniority	Senior specialist / autonomous individual contributor. Not a junior operator and not a Head/Director role.
Primary market	UAE growth first. Saudi remains a defined optimisation workstream and should not be aggressively scaled until CAC, returns and fulfilment economics improve.
90-day outcome	Final full calendar month Shopify net revenue at or above AED 607,200, with a repeatable paid-acquisition operating system behind the result.
Commercial guardrail	Approximately AED 133,000 monthly contribution floor under normal trading conditions. Shopify is the commercial source of truth.
Budget authority	Free movement within the AED 150,000 approved monthly media budget. Evidence-based total increase up to AED 165,000. Higher spend requires GM approval.
Operating cutover	Specialist owns daily decisions from approximately Day 7. Agency support ends by Day 21.

Decision Authority

Independent	Launch/pause campaigns. Restructure campaigns/search. Change targeting/bids. Move budget across campaigns and Meta/Google. Approve performance copy within guidelines. Change feed segmentation. Request landing-page changes. Initiate tracking investigations. Define performance tests.
Within guardrails	Manage total monthly media around AED 150,000 and move spend freely within that approved budget. Increase total media up to AED 165,000 only when evidence and commercial guardrails support it.
Requires Founder / GM	Media above AED 165,000. Permanent pricing changes. Discounts above 15% outside agreed promotional periods. Major bundle economics. Material free-shipping changes. New-market decisions. Major commercial strategy changes.
Requires Ecommerce approval	Material website changes, merchandising, product presentation and promotional implementation.

WHAT MATERIALLY SHAPES EXECUTION

4. Role-Specific Strategic Context

Strategic factor	Why it matters to this role
Commercial objective is constrained by contribution, not revenue alone	The specialist must optimise toward Shopify net revenue and contribution, not platform-attributed revenue in isolation. Aster & Row has explicitly rejected growth bought through excessive media spend or margin-eroding discounting.
Two paid markets have different economics	UAE is the primary growth market: approx. AED 445k monthly net revenue, AED 118k media spend, 2.66x paid ROAS, AED 158 CAC, AED 382 AOV and 6.5% returns/cancellations. Saudi is smaller and weaker: approx. AED 107k revenue, AED 32k spend, 2.22x ROAS, AED 203 CAC, AED 350 AOV and 10% returns/cancellations. Saudi should be optimised before scaled.
Product economics should influence allocation	Cooling Sheet Sets represent 46% of revenue mix and remain the main commercial priority. Bundles are a secondary growth opportunity because of attractive margin and basket-value potential. The specialist must avoid driving volume disproportionately into low-AOV or heavily discounted sales.
First-order economics matter more than speculative LTV	Current new-customer CAC is approx. AED 166, first-order AOV approx. AED 358 and 12-month net revenue per acquired customer approx. AED 515. Repeat purchase is meaningful, but the first 90 days should primarily protect first-order contribution rather than justify weak acquisition through assumed future LTV.
The calendar creates both opportunity and measurement risk	The first 90 days include an October premium cooling duvet launch, late-November White Friday and an early-December UAE National Day promotional period. Peak trading can produce atypical conversion, AOV and discount behaviour, so event results must be separated from normal-trading evidence.
Existing execution resources make immediate action possible	The designer can produce approx. 8-12 static variants and 2-3 edited video/UGC variants per week. The developer can normally provide about 8 hours weekly and up to 12 around major events. The specialist should direct these resources through prioritised briefs rather than wait for a larger team.
Tracking is usable but not perfect	Shopify is the commercial source of truth. GA4 is secondary for behaviour and funnel analysis. Meta and Google attribution remain valid for within-platform optimisation, but platform revenue must not be summed as company revenue. Tracking improvements should run in parallel with commercial execution rather than delaying it.
Founder removal is an explicit management outcome	The operating design must progressively shift the Founder from daily acquisition decisions to commercial exceptions. The Ecommerce Manager becomes the primary weekly counterpart. Founder/GM joins a short weekly commercial review for roughly six weeks, then moves toward fortnightly or exception-based involvement.

Baseline Commercial Snapshot

Metric	Baseline	Interpretation
Shopify net revenue	AED 552,000 / month	Trailing 3-month baseline

IMPLEMENTATION ROADMAP

6. 30 / 60 / 90-Day Execution Roadmap

The roadmap is designed for a senior specialist who is expected to begin meaningful commercial execution immediately. It does not treat Month 1 as passive onboarding. Existing data, account history and operational resources are sufficient for diagnosis, controlled corrections and structured testing to begin while the specialist learns the business.

Working assumption

The engagement starts early enough for the October premium cooling duvet launch, late-November White Friday and early-December UAE National Day period to fall within the first 90 days. If the actual start date moves materially, preserve the sequence and commercial checkpoints while compressing calendar-specific preparation where necessary.

Days 1-30 - Learn, Establish, Cut Over and Baseline

Plain-English phase summary: The specialist takes control of the paid-acquisition system quickly, validates the commercial baseline, removes obvious inefficiency and creates the weekly operating rhythm. By the end of Month 1, Aster & Row should know what is working, what has been corrected, what still needs testing and how the October launch / White Friday preparation will be managed.

Primary Objective

Complete a controlled agency-to-specialist cutover, establish one trusted commercial performance view, correct immediate paid-media issues and launch the first evidence-led testing cycle without waiting for perfect tracking.

Strategic Priorities

- Operational ownership from approximately Day 7 and complete agency cutover by Day 21.
- Validate Shopify-based commercial reporting and contribution logic against channel, country and product views.
- Diagnose Meta, Google Search/Shopping/PMAX, creative, feed and landing-page performance. Act immediately on clear waste or structural issues.
- Keep overall media broadly around AED 150,000 while improving allocation and decision quality.
- Establish a sustainable testing backlog that matches designer and developer capacity.
- Prepare the October premium cooling duvet launch and begin White Friday planning well before the promotional window.
- Treat Saudi as a separate optimisation workstream rather than a scaling market.

Workstream	What the specialist will do	Why this matters	Expected deliverable	Client input / dependency	Done when
Ownership and agency cutover	Week 1: obtain full access, review change history, naming, budgets, tracking and historical context with the agency. From about Day 7, the specialist becomes the only person making routine campaign changes. Close remaining handover items by Day 21.	Prevents dual ownership and gives Aster & Row one accountable decision-maker.	Handover record, account ownership map, outstanding issue list and confirmed cutover.	Founder/Ecommerce availability. Agency handover. Admin access.	Daily campaign decisions are owned by the specialist, the agency has no parallel change authority, and unresolved historical questions are documented.
Commercial baseline and reporting	Reconcile Shopify net revenue/orders/refunds with GA4 behaviour and platform attribution. Reproduce the approx. AED 133k contribution methodology. Establish weekly views by channel, market and material product category.	Scaling decisions need a common commercial source of truth and must not double-count platform revenue.	Weekly acquisition dashboard, metric definitions and baseline pack.	Shopify/finance data, product economics, media costs and returns information.	Leadership can trace reported revenue to Shopify, understand attribution differences and see contribution alongside media metrics.
Channel diagnosis and immediate corrections	Review Meta campaign structure, audience overlap, creative fatigue and budget concentration. Review Google brand/non-brand Search, PMAX/Shopping structure, query quality and feed segmentation. Pause or repair obvious inefficiency where evidence is clear.	Immediate waste control creates room for better allocation before any meaningful increase in total spend.	Account audit with action log. Implemented high-confidence corrections. First allocation recommendations.	Full ad-account history. Merchant Center/feed access. Stock/product priorities.	Major structural risks and obvious waste are either corrected or placed into a prioritised test/repair backlog.

Workstream	What the specialist will do	Why this matters	Expected deliverable	Client input / dependency	Done when
Testing and creative operating system	Create a hypothesis-led test roadmap covering creative, audience/search, product/offer and landing-page questions. Translate priorities into briefs timed to the designer's 2-day static and 4-5-day edited-video turnaround.	Aster & Row needs proactive learning before fatigue or performance decline forces reactive creative production.	Test register, creative brief format, first briefs and decision log.	Designer capacity. Brand guidelines. Existing footage, customer content and photography.	Every live test has a hypothesis, metric, owner and decision rule. Creative production is sequenced against commercial priorities.
CRO, tracking and feed backlog	Identify the highest-impact paid landing-page, tracking and product-feed issues. Prioritise developer work within about 8 hours per week. Fix critical measurement problems in parallel with campaign execution.	Developer capacity is limited, so requests must be prioritised by expected commercial impact rather than by convenience.	Prioritised developer backlog with business rationale and measurement plan.	Ecommerce approval. Developer availability. GTM/CAPI/enhanced-conversion access.	Critical tracking failures are resolved/assigned and the highest-value landing-page/feed changes have clear owners and measurement.
Market, product and trading-event plan	Establish separate UAE and Saudi views. Define how Cooling Sheet Sets and bundles will be evaluated. Prepare October cooling duvet launch requirements and a White Friday workback plan.	Market and product economics differ materially, and peak trading requires longer lead times than normal weekly optimisation.	90-day market/product test priorities. October launch plan. White Friday preparation calendar.	Product launch details. Promotion decisions. Stock position. Creative/developer availability.	UAE/Saudi are no longer treated as one blended market and event dependencies have clear deadlines and owners.

ROADMAP - DAYS 1-30 CONTINUED

Days 1-30 - Priority Actions, KPIs and Checkpoints

Priority Actions

- Secure full Meta, Google Ads, Merchant Center, Shopify, GA4/GTM and tracking access. Confirm account ownership and permissions.
- Complete structured agency handover in Week 1. Assume routine optimisation authority from approximately Day 7. complete cutover by Day 21.
- Rebuild the weekly commercial baseline from Shopify and finance inputs, including blended paid-media efficiency and contribution.
- Audit recent six-month / trailing-three-month performance and diagnose the May scaling failure by channel, campaign, market and product where data allows.
- Remove or constrain obvious inefficiency without waiting for a complete redesign of every campaign.
- Create the first creative testing roadmap and issue performance briefs that reflect actual designer capacity.
- Prioritise landing-page, feed and tracking changes against the developer's available hours and expected commercial impact.
- Prepare the October cooling duvet launch and White Friday acquisition workback, including creative, campaign, landing-page and measurement dependencies.

Relevant KPIs

Type	KPI	Month-1 expectation
Controlled	Agency cutover	Specialist owns routine daily decisions from about Day 7. Full operating cutover by Day 21.
Controlled	Weekly commercial reporting	Shopify-based dashboard and decision log functioning weekly, with platform attribution shown separately.
Controlled	Testing discipline	Active tests documented with hypothesis, measure and continue/change/stop decision. Creative/developer briefs issued against priorities.
Performance	Paid CAC / ROAS / blended efficiency	Track against AED 166 CAC, 2.57x paid ROAS and approx. 3.68x Shopify net revenue / media-spend baseline. Do not force arbitrary Month-1 improvement.
Performance	AOV / conversion	Track against approx. AED 376 AOV and 1.64% site CVR. Protect the approx. AED 365 AOV guardrail unless a documented contribution case supports deviation.

MEASUREMENT

7. KPI and Success Measurement Framework

The KPI framework separates execution activity, intermediate performance and business outcomes. Controlled KPIs are primarily within the specialist's ownership. Influenced KPIs depend materially on pricing, merchandising, stock, fulfilment, returns, customer behaviour or management decisions. Historical baselines are used where reliable. Where deeper segmentation is not yet reliable, Month 1 should establish or validate the baseline rather than invent a target.

Activity KPIs

KPI	Definition	Why it matters	Frequency	Target / benchmark	Control
Weekly acquisition review completed	Commercial performance, changes, tests, blockers and next actions reviewed with Ecommerce Manager.	Ensures decisions are made consistently rather than reactively.	Weekly	Every week from Week 1. Decisions logged.	Controlled
Account ownership / handover status	Whether routine campaign changes are exclusively controlled by the specialist.	Prevents dual ownership.	Weekly until complete	Daily ownership from ~Day 7. Full cutover by Day 21.	Controlled
Structured test coverage	Material live tests have a documented hypothesis, primary measure and decision status.	Turns testing into an evidence system.	Weekly	All material active tests documented. No arbitrary test-count target.	Controlled
Creative briefing cadence	Performance briefs issued early enough to use available design capacity against priority hypotheses.	Prevents reactive creative production.	Weekly	Briefing aligned to prioritised roadmap and designer turnaround/capacity.	Controlled
Search/feed review	Search terms, non-brand/PMax/Shopping structure and feed segmentation reviewed for commercial quality.	Protects Google efficiency and product allocation.	Weekly	Review completed. Decisions/actions logged.	Controlled
CRO/developer prioritisation	Paid landing-page, tracking and feed requests ranked by commercial impact within available developer capacity.	Prevents technical backlog from consuming scarce capacity.	Weekly	Prioritised queue fits normal ~8 hrs/week unless peak support is agreed.	Controlled

Performance KPIs

KPI	Definition	Why it matters	Frequency	Target / benchmark	Control
Paid new-customer CAC	Paid media spend / paid-acquired new customers using the agreed operational view.	Primary first-order acquisition efficiency measure.	Weekly + monthly	Baseline approx. AED 166. Improve sustainably. Analyse UAE/Saudi/product where volume supports it.	Controlled / Influenced
Paid ROAS	Platform-attributed paid revenue / media spend, interpreted without summing platform revenue as company revenue.	Useful for within-channel optimisation, but not sufficient for commercial scaling alone.	Weekly	Baseline approx. 2.57x. Improve/protect alongside Shopify and contribution evidence.	Controlled / Influenced
Blended paid-media efficiency	Shopify net revenue / paid-media spend.	Connects company revenue to total paid spend without double-counting attribution.	Weekly + monthly	Derived baseline approx. 3.68x. Improve/protect in conjunction with contribution.	Influenced
Site conversion rate	Net orders / site sessions.	Shows whether paid traffic and ecommerce experience convert effectively.	Weekly + monthly	Baseline approx. 1.64%. Establish deeper landing-page/market baselines and improve where evidence is reliable.	Influenced
Blended AOV	Shopify net revenue / net orders.	Protects against low-quality growth through discount-led conversion.	Weekly + monthly	Baseline approx. AED 376. Avoid below approx. AED 365 without documented contribution case.	Influenced
New-customer first-order AOV	First-order net revenue / acquired new customers.	Links acquisition cost to immediate basket quality.	Monthly / cohort	Baseline approx. AED 358. Protect first-order economics before relying on LTV.	Influenced

- Designer, developer and Customer Service contacts introduced.
- Weekly performance meeting and initial Founder review booked.
- Authority and escalation rules circulated.

15. Risks and Likely Failure Points

Risk	What could go wrong?	Why it matters	Mitigation
Dual ownership during handover	Agency and specialist both change campaigns, obscuring accountability and learning.	Creates conflicting optimisation and makes performance movements hard to interpret.	Single change owner from about Day 7. Agency becomes context-only support. Cutover by Day 21.
Scaling repeats the May pattern	Spend rises before marginal economics are proven.	Revenue may grow while ROAS and contribution deteriorate.	Hold around AED 150k initially. Require documented evidence for increases. Reverse scale when marginal performance weakens.
Platform ROAS overrides company economics	Meta/Google attribution is treated as total business revenue.	Can double-count impact and reward low-quality revenue.	Shopify is commercial source of truth. Show platform attribution only for channel optimisation. Report blended efficiency and contribution.
White Friday creates misleading 'success'	Promotions raise volume while discounting changes margin/AOV.	A strong event month may not represent repeatable performance.	Use client-agreed final-month measure but bridge event vs normal-trading results. Quantify contribution and AOV effects.
Saudi is scaled too early	Higher CAC and returns are ignored because aggregate growth is positive.	Can dilute contribution and create fulfilment/returns burden.	Separate Saudi reporting. Require efficiency/returns improvement before aggressive scale.
Creative pipeline becomes reactive again	Testing waits for fatigue or asset requests are not linked to hypotheses.	Meta performance may decay and learning remains weak.	Maintain test roadmap. Brief against 8-12 static / 2-3 video capacity. Prioritise evidence over asset volume.
Developer queue becomes a bottleneck	Low-value requests consume limited weekly hours.	High-impact tracking/CRO/feed work is delayed.	Rank requests by expected commercial impact. Reserve peak capacity for critical event needs.
Founder remains the hidden decision-maker	Routine issues are escalated despite delegated authority.	Leadership time is not released and specialist autonomy is weakened.	Use documented authority. Ecommerce Manager is weekly counterpart. Escalate only reserved decisions.
Product/stock quality ignored during scaling	Campaign performance is assessed without stock, margin or returns signals.	Paid media can drive unavailable or low-quality revenue.	Include stock and category economics in weekly review before material scaling.

SELECTION BLUEPRINT

16. Candidate Selection Criteria and Success Profile

Critical Selection Criteria

- Personally operates Meta and Google Ads at a senior level. Does not rely on an agency or junior operator for routine execution.
- Can manage paid acquisition against commercial ecommerce metrics - CAC, AOV, contribution, returns and marginal efficiency - not just platform ROAS.
- Can diagnose mature accounts with historical complexity and make confident scale/reduce/stop decisions within defined authority.
- Can run a structured creative testing system and translate performance learning into clear briefs for a designer using existing assets.
- Can define paid landing-page hypotheses, prioritise developer work and measure the commercial result without becoming the developer.
- Can communicate clearly with an Ecommerce Manager and Founder/GM while remaining autonomous on routine decisions.
- Can provide at least five dependable hours of UAE-day overlap and agreed additional monitoring around peak trading periods.

Strongly Preferred Criteria

- Direct DTC ecommerce experience at comparable multi-channel spend/complexity.
- UAE performance-marketing experience and familiarity with regional trading patterns.
- Saudi/MENA acquisition experience, especially where returns/fulfilment economics differ by market.
- Strong Google Shopping / Merchant Center / PMax segmentation experience as well as Meta creative optimisation.
- Experience operating through major ecommerce promotional periods without allowing discount-led volume to obscure contribution.

- Shopify, GA4/GTM, Meta CAPI and Google enhanced-conversion fluency sufficient to diagnose issues with developers.

Success Profile

What an excellent performer looks like at Aster & Row

Commercially curious, hands-on and decisive. They can enter the accounts in Week 1, identify what matters quickly, make controlled corrections without waiting for perfect data, and explain every major budget decision in business terms. They create a proactive learning system across media, creative and landing pages, use the Ecommerce Manager as a partner rather than an approval bottleneck, and escalate to the Founder only when a reserved commercial decision is genuinely required.

Candidate Evaluation Framework

Criterion	Evidence to look for	Warning signs
Direct account ownership	Examples where candidate personally changed structures, budgets, bidding and targeting in live ecommerce accounts.	Only describes agency management or report review. Cannot explain specific execution choices.
Commercial judgement	Can walk through a scale decision using CAC, AOV, margin/contribution, marginal spend and product/market context.	Defaults to 'ROAS went up/down' without commercial reconciliation.
Testing discipline	Shows a test backlog/learning system and how evidence led to continue/change/stop decisions.	Lists many tests but cannot explain hypotheses or decision consequences.
Creative performance loop	Can brief creative from account evidence and manage fatigue/iteration using limited resources.	Treats creative volume as the goal or expects to produce/design all assets personally.
Google depth	Can discuss query quality, brand/non-brand separation, Shopping/PMax/feed segmentation and profitability.	Relies on automated platform recommendations without query/product-level interrogation.
CRO / cross-functional execution	Can prioritise landing-page/tracking changes with developer constraints and measure outcomes.	Creates large technical wish lists with no commercial prioritisation.
Autonomy and stakeholder fit	Comfortable owning routine decisions and explaining exceptions to Ecommerce/Founder stakeholders.	Requires frequent Founder approval or pushes ordinary optimisation decisions upward.
Regional fit / coverage	Demonstrates dependable UAE overlap and awareness of UAE/Saudi differences.	Limited overlap or treats GCC markets as interchangeable without evidence.



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Execution Blueprint

EXECUTION CAPABILITY PLAN

AtlasBridge Packaging

Export Outbound Sales Development Specialist

SELECTED PAGES FROM A 19-SECTION EXECUTION BLUEPRINT

SECTION 2

Business Objective and Problem Being Solved

Current Situation

AtlasBridge is a Dubai-based B2B exporter of custom printed flexible packaging, including stand-up pouches, rollstock and sachets, serving manufacturers, brand owners/co-packers and established distributors across GCC and selected East African markets. New customers typically place an initial commercial order and reorder once specifications, print quality and delivery performance are proven.

Today, new business is still disproportionately created through referrals, relationships, trade shows, inbound activity and opportunistic prospecting by senior commercial staff. Sales managers are capable of converting suitable opportunities but have insufficient time to perform disciplined research, first-touch prospecting and persistent follow-up every week.

Business Problem

Constraint	Observed Effect
Ownership gap	No single person owns pre-opportunity outbound execution every week.
Targeting gap	Account lists are not consistently built by priority market, segment and commercial-fit signal.
Follow-up gap	Prospects may receive only one or two touches before attention returns to live deals.
Qualification gap	Sales has previously received meetings below commercial scale, outside target sectors or without a realistic buying window.
Learning gap	HubSpot does not consistently capture qualification, outreach status and disqualification reasons, so activity does not reliably improve over time.

Commercial and Operational Impact

- The six-month growth objective from approximately AED 3.2m to AED 3.52m average monthly net revenue becomes harder to achieve without a scalable source of new accounts.
- Senior sales time is consumed by list building and basic prospecting rather than discovery, solution fit, quotations and closing.
- Founder and Commercial Director involvement remains necessary when pipeline weakens, creating avoidable leadership dependency.
- Meeting volume can rise without useful pipeline if qualification standards are not enforced, repeating the previous agency failure.
- Available sales and fulfilment capacity may remain underused if enough qualified new opportunities do not enter the funnel.

Desired Business Outcome

Outcome statement

Build a predictable, quality-controlled outbound acquisition system that consistently creates sales-accepted export opportunities from priority markets, supports approximately AED 240k/month of first-order net revenue once mature, and reduces dependency on senior leadership for routine prospecting.

The AED 240k/month figure is a mature-state commercial expectation derived from leadership's stated 75% contribution to the AED 320k monthly growth objective. It is not a guarantee and should not be used as the sole Day-90 pass/fail measure because the normal sales cycle is approximately 60 days.

SECTION 3

Role Purpose, Ownership and Scope Boundaries

Role purpose

This capability exists to turn defined export-market priorities into a consistent flow of commercially credible sales conversations by owning the work between target-account identification and completed qualified-meeting handoff.

Recommended Seniority / Capability Level

Mid-level specialist. The role must be experienced enough to build and improve an outbound process from imperfect historic data, make account-selection judgements, personalise approved messaging, operate across multiple channels, qualify commercial fit, maintain CRM discipline and use feedback to improve execution without requiring approval for every prospect.

A junior execution-only SDR would require a mature list, script, cadence and qualification system that AtlasBridge does not yet have. A manager or head-of-sales-development level is unnecessary because the role has no team leadership, pricing authority, sales-closing ownership or responsibility for overall commercial strategy.

Primary Ownership

- Researching and prioritising ICP-fit target accounts by market, segment and commercial-scale signals.
- Identifying and validating relevant procurement, supply-chain, operations, packaging/product-development, commercial and owner/GM stakeholders.
- Executing approved personalised outreach through email, LinkedIn and telephone, with WhatsApp only after engagement or where an existing business relationship makes it appropriate.
- Persistent follow-up, no-show recovery, rescheduling and nurture until a qualified meeting is completed.
- Qualification against market, company fit, commercial scale, active need/trigger, buying window and stakeholder criteria.
- Accurate HubSpot capture of outreach status, qualification evidence, disqualification reason, next step and meeting handoff information.
- Routing qualified meetings to the correct Export Sales Manager and maintaining pre-handoff ownership until completion.
- Weekly learning on market, segment, message, stakeholder, channel, objections and disqualification patterns.

Supporting Responsibilities

- Surface recurring objections, proof requirements and content gaps to Marketing, Sales and technical/product staff.
- Request technical validation when a prospect's requirement sits outside normal MOQ, product or application parameters.
- Support Sales with context and follow-up information where required before a completed qualified meeting becomes an accepted commercial opportunity.
- Contribute evidence to market-priority decisions without independently changing strategic market coverage.

Outside the Role's Ownership

Boundary	Owner / Rule
Discovery through close	Export Sales Managers own solution fit, specification review, quotation, negotiation, commercial approval and closing after accepting the opportunity.
Pricing and discounts	SDR may use approved guidance but does not create offers, approve discounts or make contractual promises.
Technical / regulatory claims	Exact claims on cost savings, shelf life, barrier performance, regulatory compliance or guaranteed delivery require approved technical/commercial validation.
Market strategy changes	Major changes to target countries, offers or commercial positioning require Commercial Director approval.
Existing accounts / protected relationships	Active customers, live opportunities, strategic leadership relationships, protected distributors and do-not-contact accounts remain excluded or specially handled.

Days 31-60 - Execute, Test and Optimise

Plain-English phase summary: Month 2 shifts from foundation-building to sustained execution. The specialist should run the agreed system every week, deliberately test where quality improves, and use Sales feedback to remove weak segments, messages, contacts or process steps.

Primary Objective

Generate a repeatable flow of qualified Saudi and Oman meetings and sales-accepted opportunities while proving which targeting, messaging and channel combinations deserve continued investment.

Strategic Priorities

- Increase consistency before increasing breadth.
- Use qualification acceptance and opportunity progression - not meeting count alone - to judge quality.
- Test segment/problem/message/channel hypotheses with clear evidence requirements.
- Build a dated nurture system for ICP-fit prospects with later buying windows.
- Repair data, messaging or handoff failure points quickly rather than continuing weak activity.

Execution workstream	What the specialist will do	Why it matters	Expected deliverable	Client input / dependency	Done when
1. Consistent priority-market execution	Operate recurring research, contact mapping, email/LinkedIn/call outreach, follow-up and qualification across the best-fit Saudi and Oman pools. Maintain coverage depth rather than exhausting lists with shallow one-touch activity.	Predictability requires weekly ownership and persistent follow-up, the exact gap AtlasBridge is trying to remove.	Stable weekly execution rhythm, growing qualified-meeting flow and current account/contact coverage in HubSpot.	Continued Sales capacity and prompt calendar/meeting availability.	Activity is sustained without Founder/ESM prompting and prospects do not lapse because live deals make the team busy.
2. Structured targeting and message tests	Compare Saudi food/snack vs coffee vs nutraceutical, Oman food vs coffee vs co-packers/distributors, and problem themes such as supply reliability, print consistency, launches and secondary supplier needs. Compare stakeholder and channel patterns where volume permits.	The business needs evidence on what creates accepted opportunities, not generic engagement.	Test log with hypothesis, observed response/qualification/acceptance evidence and continue/change/stop recommendation.	Commercial Director approval only where tests would alter market strategy, claims or offers.	At least the highest-volume market/segment combinations have evidence-led decisions, with weak approaches changed or constrained rather than automatically repeated.
3. Qualification and Sales feedback loop	Review every Sales rejection/disposition, distinguish timing from true disqualification, refine pre-meeting questions and improve multi-threading where the initial contact is an influencer rather than final approver.	The previous agency failure shows that booked meetings can consume senior time without creating pipeline.	Updated qualification guidance, rejection-reason analysis and evidence of improved handoff consistency.	ESMs record rejection reason and opportunity status. Technical/product staff answer unusual fit questions.	Sales can explain why accepted meetings are worth taking, rejected meetings have coded reasons, and recurring rejection themes are being acted on.
4. Nurture, pipeline and funnel validation	Maintain future-date/trigger nurture for good-fit accounts not ready within the immediate cycle. Recover no-shows. Trace accepted opportunities through discovery, quotation and later stages. Compare the provisional 12% meeting-to-win assumption with emerging outbound evidence.	With a ~60-day cycle, future revenue depends on preserving good accounts and measuring intermediate progression.	Nurture queue, accepted-opportunity view, provisional funnel conversion report and qualified-pipeline summary.	ESM stage updates and credible first-order opportunity estimates after discovery where available.	Good-fit timing deferrals have next actions, Sales-owned opportunities are visible, and the business can distinguish activity from real pipeline progression.

Priority Actions

- Maintain Saudi and Oman as the main execution focus until quality and repeatability are demonstrable.
- Use actual Sales acceptance and stage progression to determine whether more volume should be added.
- Create stop/change rules for segments or messages producing engagement but poor commercial fit.
- Test multi-threading where an operational/technical influencer can open procurement or owner access.
- Tighten contact data validation if Apollo/list quality is creating bounce, wrong-person or wasted-call patterns.
- Quantify qualified pipeline using opportunity-specific expected first-order value where Sales can credibly estimate it. Do not inflate pipeline by assigning AED 120k to every meeting automatically.

Expected Outputs / Deliverables

Stable execution rhythm. Segment/message/channel test log. Refined qualification and rejection rules, nurture queue. Improved Sales handoff consistency. Accepted-opportunity/pipeline view. Provisional funnel conversion report. Month-2 commercial review.

Relevant KPIs

KPI	Type	Ownership	Phase benchmark / decision use
Meaningful response rate	Performance	Influenced	Compare with the Month-1 baseline by market, segment, message and channel. Use the evidence to continue, change or stop weak combinations.

KPI	Type	Ownership	Phase benchmark / decision use
Qualified outbound meetings completed	Performance	Influenced	Track trend from the validated Month-1 baseline while protecting qualification quality. No automatic numeric uplift if sample size remains too small.
Sales acceptance / rejection	Performance	Influenced	Monitor whether meeting quality is improving. Every rejection should retain a coded reason that can inform targeting or qualification changes.
Qualification-to-opportunity progression	Performance	Influenced	Establish the first reliable baseline for accepted meetings entering a genuine Sales-owned commercial process.
Cadence / nurture completion	Activity	Controlled	ICP-fit prospects with later timing should have a dated future action or trigger in HubSpot rather than disappearing from follow-up.
Qualified outbound pipeline created	Business outcome	Influenced	Establish live baseline using opportunity-specific expected first-order value where Sales can credibly estimate it. Do not assign the average order value to every opportunity.

Client Dependencies and Checkpoints

- Client dependencies: rapid ESM disposition of meetings/opportunities. Marketing/technical proof support, Commercial Director decisions on persistent ICP or offer ambiguities. Email infrastructure functioning safely.
- Checkpoint - mid-Month 2: review whether Saudi/Oman list quality, qualification and messaging are strong enough to increase throughput or whether repair is required.
- Checkpoint - end of Month 2: decide which segment/message/channel combinations continue, change or stop. Decide whether Kuwait/Bahrain should enter controlled secondary testing in Month 3.

End-of-phase success criteria

Outbound is operating consistently. The strongest and weakest market/segment/message patterns are becoming visible. Sales feedback is changing qualification behaviour. Qualified pipeline is being created and tracked. Nurture is active, and Month-3 scaling decisions are based on evidence rather than calendar timing.

Interpretation

- The mature-state commercial requirement is directionally feasible within the stated downstream meeting capacity: ~17 qualified outbound meetings/month is below the ~24 additional meetings/month Sales says it can handle.
- At the supplied 29% gross-margin estimate, one average first order produces ~AED 34.8k gross profit and one minimum viable AED 75k order produces ~AED 21.75k gross profit. Both exceed the AED 16k monthly direct SDR-plus-tool budget on a gross-margin contribution basis.
- This is not a full ROI or payback calculation. It excludes timing, overhead, management time, delivery-partner fees if any, other sales costs, failed opportunities and any difference between stated gross margin and true incremental contribution.
- Because the sales cycle is ~60 days, Month-1 and much of Month-2 economics should be judged through execution quality, qualified pipeline and stage progression. First-order revenue should become a stronger measure as sufficient opportunities mature.
- The ~12% conversion and ~AED 120k average first order must be validated specifically for outbound. If either changes materially, the required qualified-meeting run rate should be recalculated.

Economic decision rule

Do not chase ~17 meetings/month at the expense of fit. The commercial model only works if the meetings behave like genuinely qualified opportunities. If Sales acceptance or opportunity progression weakens as volume grows, repair the upstream system before increasing activity.

SECTION 18

First-Month Priorities

Rank	Priority	What Must Be Completed
1	Protect the database	Confirm CRM suppression for customers, live deals, strategic relationships, protected distributors, DNC, disputes and genuine incompatibility before contact.
2	Build the core target universe	Create prioritised Saudi and Oman account pools using segment rules and commercial-scale signals, salvage historic lists only after revalidation.
3	Map stakeholders	Identify credible procurement, supply-chain, operations, packaging/product and owner/GM contacts. Validate data and multi-thread where useful.
4	Establish safe messaging	Approve segment/problem message themes and technical/commercial claims guardrails. Use product proof without unsupported performance promises.
5	Launch live outreach	Begin lower-volume personalised email, LinkedIn and telephone outreach immediately while dedicated cold-email infrastructure is prepared.
6	Make qualification visible	Configure HubSpot fields and handoff evidence for market, role, scale, need, timing, packaging requirement, supplier situation, rationale and next step.
7	Establish the baseline	Measure response, qualified meetings, Sales acceptance/rejection, progression and CRM completeness, label small samples provisional.
8	Create the feedback loop	Run weekly Commercial Director/ESM quality review and make the first evidence-led continue/change/stop decisions.

SECTION 19

Final Recommendation

What Capability Does AtlasBridge Need?

A dedicated Export Outbound Sales Development capability focused on research-led account selection, multi-channel prospecting, commercial qualification, nurture, CRM discipline and sales-ready handoff across priority export markets.

What Seniority and Autonomy Level Is Required?

Mid-level specialist. The person must be capable of independently operating and optimising the outbound engine within the approved ICP, messaging, claims and spend boundaries. They should not require daily prospect-by-prospect supervision, but major changes to target markets, pricing/discounts, contractual commitments, technical claims, commercial offers or tool spend above AED 1,500/month remain with the Commercial Director or appropriate specialist.



TalentOracle

Execution Blueprint

EXECUTION CAPABILITY PLAN

YoBio

Senior Scientific Data & Analytics Capability

SELECTED PAGES FROM A 19-SECTION EXECUTION BLUEPRINT

1. Executive Summary

YoBio has strong scientific expertise and several years of experimental and customer-project information, but the analytical layer is fragmented. Scientists commonly prepare, clean, analyse and report their own data using spreadsheets, specialist software and individual approaches. Historical data is rarely analysed across similar projects, reusable analytical workflows are limited, and no single person owns the structure, quality, reproducibility and cross-project analysis of scientific data.

The required capability is a senior, hands-on Scientific Data & Analytics specialist who can work across scientific teams, establish practical data standards, build reproducible statistical workflows, reduce recurring manual effort, and identify patterns in suitable historical datasets without taking over biological interpretation or laboratory decision-making.

The first 90 days should deliberately avoid a company-wide data-platform programme. The specialist should inventory and prioritise the highest-value data, select one or two use cases, validate confidentiality and data-use boundaries, establish a trustworthy baseline, standardise the minimum data structure needed for analysis, and implement at least one reusable analytical workflow. Historical cross-project analysis should proceed only where linkage, metadata and comparability are sufficient.

By Day 90, YoBio should have a repeatable scientific-data operating model, measurable evidence of reduced preparation/rework for at least one recurring workflow, one or more defensible historical insights or a documented finding that the available data cannot yet support them, and a prioritised next-quarter plan for further automation, data improvement and advanced modelling.

Evidence snapshot from supplied planning workbook

Evidence	Observed signal	Implication for the role
Data estate	18 source types, approximately 43,753 records across the inventory.	The specialist must prioritise, a full-estate clean-up is inappropriate for the first 90 days.
Project metadata	60 projects, 46 marked customer-confidential, 12 use a non-standard project naming variant.	Governance and identifier normalisation are prerequisites for cross-project analysis.
Analysis effort sample	90 logged analyses totalling 10,025 minutes, 5,702 minutes are preparation/cleaning plus reporting.	There is a credible efficiency opportunity outside the core scientific interpretation step.
Repeatability signal	70 of 90 logged analyses use a repeated template, 52 of 90 are marked high automation candidates.	Reusable workflows are likely to create value earlier than advanced modelling.
Quality signal	20 of 90 logged analyses were blocked by missing metadata, known issues include mixed units, duplicate versions and distributed storage.	Data-quality checks and provenance must be built into the analytical process, not treated as a later clean-up.
Template proliferation	85+ analysis templates with overlapping calculations are identified as a high-severity issue.	Standardisation should focus on trusted recurring methods and controlled templates/code, not broad automation by default.

5. Outcome-Based Responsibilities

Responsibility	Expected outcome	Example activities	Priority
1. Prioritise the scientific data estate	A ranked view of which datasets are usable, valuable and permitted for analysis.	Map priority sources, owners, formats, linkage, confidentiality, quality and potential value, select 1-2 90-day datasets.	Critical
2. Establish analytical data quality and structure	Priority datasets have defined fields, identifiers, units, metadata rules and authoritative sources sufficient for trusted analysis.	Profile missingness, naming, unit and version issues, define minimum data dictionary and validation rules.	Critical
3. Build reproducible analytical workflows	Selected recurring analyses can be repeated consistently without rebuilding the method each time.	Translate trusted scientist methods into controlled scripts/templates, version methods, document assumptions and checks.	Critical
4. Reduce manual preparation and reporting effort	Scientists spend less time on repetitive cleaning, conversion, charting and report assembly for selected workflows.	Automate safe transformations, summaries, visual outputs and quality checks, compare before/after effort.	Critical
5. Analyse historical patterns responsibly	Suitable historical data produces defensible cross-project findings or a clear statement of why the data is not yet comparable.	Assess comparability, normalise appropriate variables, test patterns, quantify uncertainty and review findings with scientists.	Critical
6. Own statistical method quality	Analyses use methods appropriate to experimental design, variability and available evidence.	Select/validate statistical approaches, document assumptions, avoid overinterpretation, flag insufficient evidence.	Important
7. Communicate actionable insight	Scientists and management can understand what the evidence shows, what remains uncertain and what decision is supported.	Create clear visualisations, concise analytical summaries and decision-oriented findings.	Important
8. Establish governed analytical practice	Data is used within agreed confidentiality, access, provenance and quality boundaries.	Maintain source-to-output traceability, permissions, versioning and escalation where data use is unclear.	Critical
9. Define the next analytical capability horizon	YoBio has an evidence-based view of where further automation, database investment or advanced modelling is worth pursuing.	Maintain opportunity backlog, assess feasibility/value, recommend scale, maintain, improve, pause or stop decisions.	Important

Days 61-90 | Stabilise, Scale and Define the Next Quarter

Plain-English Phase Summary

Month 3 makes proven improvements durable. The specialist will stabilise the workflows that have earned adoption, document analytical standards and ownership, scale only validated activity, prioritise the next data-improvement backlog, and give YoBio a clear recommendation on future specialist capacity, tooling and any modelling opportunities.

Primary objective: Embed a sustainable scientific-data operating model and decide what should be scaled, maintained, improved, paused or stopped in the next quarter.

Strategic Priorities

- Stabilise only workflows that have demonstrated accuracy, usefulness and adoption.
- Document the minimum analytical standards for data inputs, quality checks, versioning, reproducibility and scientific review.
- Translate the first 90 days into a prioritised data-quality and automation backlog.
- Assess advanced modelling opportunities against data readiness, decision value and likely maintenance burden.
- Determine ongoing specialist capacity from real workload and business demand rather than a title-based assumption.

Execution Workstreams

Workstream	What specialist will do	Why this matters	Expected deliverable	Client input / dependency	Done when
Workflow stabilisation and scale	Harden approved workflows, resolve recurring exceptions, standardise outputs and expand usage only to comparable use cases.	Ensures repeatability survives beyond the initial project.	Stable versioned workflows, release/change log, defined owners.	Scientists continue usage, quality approves relevant controls.	Selected workflows are reliable, adopted and maintainable without rebuilding.
Analytical standards and documentation	Document minimum source, metadata, unit, versioning, analysis and review expectations for priority data.	Converts individual knowledge into organisational capability.	Scientific data-analysis standard, reusable templates/code catalogue, method notes.	Scientific and quality review.	New analysis in scope can follow the standard without relying on one person's memory.
Value and KPI review	Validate activity, performance and business-outcome evidence, distinguish proven impact from provisional signals.	Prevents overstating the first 90 days and creates a credible next-quarter baseline.	90-day performance review, validated baselines, proposed future targets.	Leadership confirms business priorities and capacity constraints.	Targets are agreed from evidence rather than arbitrary percentages.
Advanced analytics / ML gate	Score potential modelling use cases against data volume, feature quality, label/target definition, decision value, validation method, confidentiality and deployment effort.	Avoids premature ML while identifying genuinely valuable next steps.	Model opportunity matrix with proceed / investigate / defer decisions.	Scientific sponsor and management input.	Any recommended modelling work has a defined decision, adequate data path and validation approach.
Ongoing capability and capacity decision	Measure recurring analytical demand, backlog, user coverage, governance load and planned customer/R&D work, recommend full-time, fractional or other ongoing delivery.	YoBio expects an ongoing capability but does not yet know the right capacity.	Capacity recommendation and next-quarter operating plan.	Sponsor budget/strategy input.	Leadership can make a resourcing decision from validated workload and value.

Expected Outputs / Deliverables

- Stable catalogue of approved reusable analytical workflows
- Scientific data-analysis standards and source-to-output documentation
- Validated KPI baseline and 90-day value review
- Prioritised next-quarter data-quality, automation and historical-analysis backlog
- Advanced modelling / ML opportunity gate with evidence-based recommendations
- Ongoing capacity and delivery-model recommendation

Relevant KPIs

KPI	Control	Month 3 treatment
Approved workflow adoption and repeatability	Controlled	Track sustained use and version consistency.
Priority workflow time / turnaround vs baseline	Influenced	Validate improvement where sample size is sufficient, otherwise carry baseline forward.
Scientist time released from repetitive steps	Influenced	Report observed release, not assumed productivity value.
Cross-project insight translated into an R&D/customer-service decision	Influenced	Record concrete decisions influenced by the analysis.
Analyses with complete traceability and method documentation	Controlled	Target broad compliance within selected 90-day scope, agree wider target after scope expansion.
Backlog value/readiness prioritisation completed	Controlled	Every candidate initiative has value, readiness, dependency and decision status.

Client Dependencies

- Leadership reviews 90-day evidence and is willing to stop weak initiatives as well as fund validated ones.
- Scientific and quality owners approve the analytical standard and future data-capture priorities.
- Budget and resource constraints for any proposed infrastructure or ongoing specialist model are disclosed before final recommendation.

Checkpoints

- Day 75: review which workflows have earned stabilisation and which should be changed/paused.
- Day 82-85: review modelling-readiness findings and any tool/infrastructure proposals.
- Day 90: executive review of impact, unresolved constraints, ongoing capacity, next-quarter priorities and stop/scale decisions.

End-of-Phase Success Criteria

YoBio has at least one trusted recurring analytical workflow in use, a governed and reproducible method for priority data, evidence of where scientist effort has been reduced or quality improved, a defensible historical-data learning outcome, agreed next-quarter priorities, and a resourcing decision that reflects observed demand.

15. Risks and Likely Failure Points

Risk	Why it matters	Mitigation
Customer data is pooled without explicit permission	Confidentiality or contractual risk, analysis may need to be discarded.	Use a data-use decision log, default to stop-and-confirm where permission is uncertain, start with internal/non-confidential data when appropriate.
The first 90 days becomes a whole-estate clean-up	Value proof is delayed and the specialist becomes a data janitor rather than analytical owner.	Limit scope to 1-2 high-value datasets/workflows, backlog non-critical historical remediation.
Automating an untrusted or variable scientific method	Creates faster inconsistency and hidden risk.	Require scientist validation, quality checks and exception handling before workflow scale.
Historical records are treated as comparable when they are not	Produces misleading patterns and unsafe scientific conclusions.	Define eligibility/comparability criteria and document exclusions, protocol changes and confounders.
Role drifts into ad hoc analysis for every team	Strategic capability building stalls and standards remain fragmented.	Sponsor protects roadmap priorities and separates urgent project support from capability work.
Scientists do not adopt the standard workflow	No actual efficiency gain, personal templates remain dominant.	Co-design with users, demonstrate equivalence/value, measure bypass reasons and iterate.
Premature platform or ML investment	Cost and complexity increase before data readiness or use-case value is proven.	Gate tooling and modelling behind Month 1/2 evidence.
Single-specialist knowledge concentration	YoBio recreates the same dependency it is trying to remove.	Require versioning, method documentation, reproducible outputs and scientist-accessible guidance.
Slow governance or access decisions	Specialist time is lost waiting for permissions or authoritative-source confirmation.	Named decision-maker, escalation path and fixed review cadence.
Insufficient life-science judgement	Statistically neat outputs may ignore experimental design or biological variability.	Select for applied life-science analytics and evidence of working with domain scientists.