

DELIVERABLE 3 OF 3

Workflow Blueprint

The repeatable system that closes the gaps: the target flow, the data rules, and a 30, 60 and 90 day rollout.

Client	Prepared by	Date
Reliquary Trading Co. (sample)	Mayberry Advisory	October 2026

Target Flow



Renewal feeds the next Trigger. The loop does not end at signature.

Stages, Owners and Rules

Stage	Owner	System of record	Data that must pass on	Rule
Trigger	Marketing ops	Salesforce	Source, account, contact, intent signal	Every form and signal creates a Salesforce record within 5 minutes.
Route	RevOps	Salesforce	Owner, territory, score	Rules assign the owner. No spreadsheet step.
Qualify	Seller	Salesforce	Buyer need, named executive, dated next step	A deal cannot enter Proposal without a named executive and a dated next step.
Propose	Deal desk	DealHub	Terms, price, approvals	Terms pass from Salesforce to the DealHub quote by field.
Sign	Legal ops	DocuSign	Approved terms, signer names	Signed terms post to NetSuite and Salesforce on their own.
Renew	Account owner	Salesforce	Health score, risk flag, renewal date	Gainsight risk flags write to the Salesforce account. Owner reviews 90 days out.

Data Fields That Must Flow

Field	Created in	Used by	Rule
Lead source	Marketo Engage	Salesforce, dashboards	Required on every record.
Owner	Salesforce routing	Outreach	Set by rule within minutes.
Intent signal	6sense	Outreach	Creates a task for the named owner.
Named executive	Salesforce	Clari	Required to enter Proposal.
Next step date	Salesforce	Clari	Required. Stale after 14 days.
Quote terms	Salesforce	DealHub	Passed by field. No re-keying.
Health score and risk flag	Gainsight	Salesforce	Written to the account on change.
Renewal date	NetSuite	Salesforce, Gainsight	Single source. NetSuite owns it.

30, 60 and 90 Day Rollout

Window	Work	Gaps closed	Owner	Done when
Days 1 to 30	Lead routing rules live in Salesforce. Spreadsheet retired.	1	RevOps, marketing ops	Median first seller touch under 4 hours for two weeks.
Days 31 to 60	Deal terms pass from Salesforce to DealHub by field. Risk flag written to Salesforce accounts.	2 and 3	Deal desk, CS ops	No re-keyed quotes. Flags on every account.
Days 61 to 90	Live forecast sync. Intent signals feed sequences with a named owner.	4 and 5	Sales leadership, demand gen	Forecast under 1 day old. Signals acted on within 1 day.

Numbers to Track

Metric	Baseline (sample)	90 day target	How it is measured
Form to first seller touch	3.4 days	Under 4 hours	Salesforce timestamps
Added days at quote re-keying	11 days	2 days	Salesforce stage dates against DealHub quote date
Renewal risk lead time	20 days	90 days	Risk flag date against renewal date
Forecast data age at the call	8 days	Under 1 day	Sync timestamp
Trigger to seller action	6 days	1 day	Signal date against first task
Handoffs rated clean	3 of 9	8 of 9	Stack Map rescored each quarter

After Day 90

The blueprint is not the end. New tools, new reps and new products reopen gaps. The ongoing review rescores the Stack Map, re-ranks the gaps and adds new fixes to this blueprint. A sample monthly review is the fourth document in this package.