PRE-CALL INTELLIGENCE · PERSONA 03

CRO. *B2B SaaS.*

A pre-call cheat sheet for the enterprise tech seller calling on a *Series B–D B2B SaaS* revenue leader.

ROLE Chief Revenue Officer | VERTICAL B2B SaaS | ARR $20M–$150M | STAGE Series B-D

BIA is a pre-call intelligence platform for enterprise tech sellers. **Synthesized from 400+ data inputs** so you don't wing the first call. Unlike call recording tools, BIA works *before* you dial.

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CRO/03

PRE-CALL

CHAPTER I · THE BUYER

What's keeping him *up at night.*

Four numbers his board tracks every QBR. Every one of them is a methodology conversation nobody wants to have — and he's running out of quarters to defer it.

PAIN	WHAT IT MEANS FOR HIM	URGENCY
Rep ramp time	6–9 months to first quota attainment. Every open territory is a quarter of pipeline the company doesn't have. The board tracks the headcount plan vs. attainment curve in every QBR.	HIGH
Forecast accuracy	Commit-category deals are closing at 60–70%. The board has lost confidence in the CRO's call. Every missed quarter triggers a methodology conversation nobody wants to have.	HIGH
Win rate in competitive deals	Win rate declining as markets mature. Every competitor sounds the same in a demo. Differentiation is collapsing to price and relationships — and neither is a durable advantage.	HIGH
Quota attainment distribution	Top 20% of reps carry 80% of the number. The middle 60% are treading water. The board wants to know why the hiring model isn't producing the productivity curve they expected.	HIGH

PRE-CALL

CHAPTER I · §2 THE TOOLING

This brief told you *what.* BIA handles *the how.*

This cheat sheet shows you what to know about a B2B SaaS CRO. BIA converts that intelligence into action.

01 · REHEARSAL

Practice objection handling before the deal, not after.

Have a live conversation with an AI CRO who runs the exact deflection pattern you see in late-stage deals. Cold call, discovery, and objection drill sessions **scored before your rep touches a real opportunity.**

02 · BATTLECARDS

Competitive intelligence built on what real buyers say about your competitors.

Sourced from G2, Capterra, Reddit, and practitioner forums. What your prospect read before your first call, **turned into a ready-to-use battlecard in 30 seconds.**

03 · ONBOARDING

New rep onboarding that gets them to first call in days, not weeks.

Buyer intelligence docs, objection banks, and discovery frameworks personalized to your ICP and product. **Not generic sales training — the specific buyers your reps are actually calling.**

04 · PLAYBOOKS

Sales playbooks built around your actual buyer's language and buying process.

Every output in BIA reflects your specific product and your specific personas. Paste your product URL once and every document rewrites itself. **In 30 seconds.**

FIX THIS NOW

The vendor calling this account next week already rehearsed the forecast conversation. Their rep knows the Commit hit rate question before your rep does. → **getbuyerintel.ai/Simulator/**

CONTINUED · THE FULL INTELLIGENCE STACK ON NEXT PAGE

PRE-CALL

The full intelligence *stack.*

Everything in this cheat sheet came from the surface layer. The full B2B SaaS CRO intelligence stack inside BIA includes six tools this brief can't fit.

01 **58-Question Discovery Bank** MEMBERS
Includes 12 qualification *trap questions* that surface deal-killers 60 days before they appear in late stage.

02 **8 Active Buying Triggers** MEMBERS
VP Sales replaced, Series C closed, new board member with ops background, missed ARR target triggering a methodology review.

03 **Trigger-to-Stakeholder Map** MEMBERS
When the CEO replaces the VP Sales, **four approval dynamics shift simultaneously** — your deal may be further along than you think, or further back.

04 **Risk & Trust Profile** MEMBERS
11 CRO trust signals and 10 deal-killers, including the 4 questions a B2B SaaS board asks when reviewing a revenue technology investment.

05 **Day-in-the-Life Narrative** MEMBERS
The vendor demo where the CRO decided in the first five minutes — based on whether you knew his rep productivity problem, not his product category.

06 **"How Not to Lose" Guide** MEMBERS
Why qualified RevTech deals die in sales ops objection, rep adoption failure, and CFO ROI scrutiny — not in the CRO evaluation.

> FIELD INTELLIGENCE
> This is what your **most aggressive competitor** pulls before every CRO call.

PRE-CALL

CHAPTER II · THE ROOM

Who's actually *in the room.*

The CRO commits. RevOps deploys. The CFO funds. Sales managers decide whether reps actually use it.

STAKEHOLDER	VETO TYPE	WHAT THEY NEED FROM YOU
VP Sales Ops / RevOps	STACK & IMPLEMENTATION VETO	They own the CRM configuration, the tech stack, and the rep workflow. If RevOps sees this as a new integration project with no dedicated resource, it dies before the CRO signs the contract.
CFO	ROI SCRUTINY	B2B SaaS CFOs model cost per rep, quota attainment cost, and ramp investment. Needs a defensible ROI model — not a productivity percentage, but a specific ARR impact tied to ramp time or win rate.
VP Enablement	ADOPTION ACCOUNTABILITY	They own rep onboarding and training programs. If this competes with or duplicates existing enablement investments, they will block it quietly. Make them a champion before the first meeting.
CEO	ARR ACCOUNTABILITY	At Series B–D, the CEO watches attainment distribution as closely as the total number. If the CRO is under board pressure, they need a vendor who helps them tell a better story.
Sales Managers / Regional VPs	IMPLEMENTATION REALITY CHECK	The CRO commits; the managers implement. If front-line managers don't believe it will change rep behavior, adoption dies at the team level.
Board / Investors	BENCHMARK COMPARISON	Investors compare ramp time, quota attainment rates, and win rates against portfolio benchmarks. The CRO needs metrics that survive a board operations review — not a vendor slide.

WINNING SEQUENCE

RevOps buy-in before CRO commitment. The best CRO purchase that RevOps hasn't approved becomes a 6-month implementation project that never fully deploys.

Scope note · *This profile covers Series B–D B2B SaaS CROs ($20M–$150M ARR). At pre-Series B the role is usually a VP of Sales. At $150M+, enterprise procurement and RevOps team size add approval layers not reflected here.*

PRE-CALL

CHAPTER III · THE OPENING

Three questions that open the *real* conversation.

01 *When you look at your ramp cohort from 12 months ago – the reps you hired in Q1 last year – what percentage are at or above quota today, and what's the biggest variable separating the ones who made it from the ones who didn't?*

USE WHEN · REP PRODUCTIVITY, ENABLEMENT, ONBOARDING TOOLS

02 *Your Commit category this quarter – what's your current hit rate on Commits that actually close, and when a Commit slips, where does it go?*

USE WHEN · FORECAST ACCURACY, DEAL INSPECTION, PIPELINE MANAGEMENT

03 *Win analysis is hard to standardize because loss reasons vary by rep and by situation. Walk me through how you currently track competitive losses – what's your win rate, and where does the attribution live?*

USE WHEN · COMPETITIVE INTELLIGENCE, WIN/LOSS ANALYSIS, BATTLECARD TOOLS

What kills credibility in the *first five minutes.*

- **Pitching "more pipeline."** His problem is conversion, forecast accuracy, and rep productivity — not lead volume. Walking in with a pipeline generation story tells him you didn't read the company.
- **Using productivity improvement percentages.** "23% improvement" means nothing. Translate it: if ramp time drops from 7 months to 5 across 20 reps, name the ARR impact.
- **Not knowing their CRM.** Salesforce and HubSpot have different workflow architectures and different RevOps team configurations. Confirm before the meeting.
- **Naming their stack tools incorrectly.** Saying "Outreach or SalesLoft" in a company that runs Apollo tells him you didn't look. Name the actual tools or don't name them.
- **Not acknowledging rep adoption failure.** Every CRO has $200K–$500K in software subscriptions his reps don't use. Not naming that — and explaining why this won't be another one — signals you haven't thought about the real barrier.
- **Applying end-of-quarter close pressure.** He knows exactly what you're doing. Pressure tells him you prioritize your number over his evaluation. That's disqualifying at the CRO level.

ON THE CALL — CHAPTER IV · THE SUBTEXT

What he's *really* asking.

The CRO is direct. He's also already had three board conversations about rep productivity.
What he asks and what he's evaluating are not the same thing.

WHAT HE ASKS	WHAT HE'S ACTUALLY EVALUATING
"Can you show me what this looks like in Salesforce?"	I'm not changing CRMs. If your product isn't native to my rep workflow, adoption will be zero regardless of how good the demo looks.
"How long does implementation take?"	My team is at 110% capacity. A 3-month implementation means this doesn't get deployed until my busiest quarter — which means it never gets deployed.
"What does change management look like?"	I've watched three tools with great demos get ignored by my reps in the first 30 days. What's structurally different here — not in the product, in the deployment and adoption model.
"Can you walk me through the ROI model?"	My CFO will ask me to justify this against ramp time improvement and win rate improvement. Give me the model in those terms — not in "productivity" terms.
"Who else in B2B SaaS is using this at our scale?"	If you can't name a CRO at a comparable company — comparable ARR, comparable headcount, comparable competitive environment — I can't take this to my board.

40+ buyer personas. Any vertical. Personalized to your product. 30 seconds.
Rehearse the Commit hit rate conversation with an AI CRO before your rep walks into the real one.

getbuyerintel.ai/Simulator/

ON THE CALL

The three objections you *will* hear — and what to say.

OBJECTION · 01

“My reps are already using too many tools.”

ROOT FEAR

I have a graveyard of RevTech investments that looked good in the demo and collected dust by day 30. My reps are at tool fatigue and my RevOps team is at integration fatigue.

WHAT ACTUALLY MOVES HIM

Show the consolidation story before anything else — which tools this replaces or reduces, not what it adds. The net tool count for reps should go down.

SAY THIS

> "Before I show you anything, I want to map what this replaces in your current stack. Based on what you're running, I think the net tool count for your reps actually goes down. Can I walk through that first?"

OBJECTION · 02

“We're in the middle of a Salesforce implementation.”

ROOT FEAR

Adding a new variable during a CRM migration is how a 6-month project becomes a 12-month disaster that costs me credibility with RevOps and the board.

WHAT ACTUALLY MOVES HIM

Position as a layer above the CRM that is implementation-independent — and schedule a post-migration kickoff with a hard date now so this doesn't slip into the never-done pile.

SAY THIS

> "We deploy above the CRM layer, so your migration timeline doesn't change our deployment at all. Can we put a kickoff date 30 days post-go-live on the calendar now, before this slips?"

OBJECTION · 03

“I need this to move the number in 90 days or I can't justify renewal.”

ROOT FEAR

I've had three board conversations in two quarters about rep productivity. If this is another investment that doesn't show results by Q-end, my credibility takes another hit.

WHAT ACTUALLY MOVES HIM

Build a 90-day success plan with two specific, pre-agreed measurable outcomes — ramp time and win rate — and name the person on your team who owns it daily.

SAY THIS

> "Let's define the two metrics before we sign — ramp time on the next cohort and win rate on competitive deals. I'll name a CSM who owns your 90-day outcome and has a weekly check-in with your RevOps lead. If we don't hit the targets, I'll recommend against renewal myself."

CONTINUED · WHAT YOU'RE COMPETING AGAINST

ON THE CALL CHAPTER VI · THE FIELD

What you're actually *competing against.*

Most deals don't lose to a competitor. They lose to one of these three.

- **The CEO who thinks the answer is better hiring.** At Series B–D, there's almost always a CEO who believes rep productivity is a talent problem, not a tooling or enablement problem. The CRO who buys your solution needs to make the structural argument — that ramp time and win rate are system problems with system solutions. Help them build that argument or they can't defend the purchase.
- **The Gong / Clari / Outreach incumbent.** The CRO already has a revenue intelligence tool that "does something like this." The question isn't whether it exists — it's whether it's actually being used and whether it's moving the metrics that matter. Name the gap in their current stack explicitly before they surface it.
- **The "let's wait for the new VP Enablement to weigh in" delay.** If the CRO has recently hired or is hiring a VP Enablement, every enablement-adjacent purchase goes into a holding pattern. Ask whether a new enablement leader is joining before you invest time in an evaluation that's about to be paused.