

QUOTAH

Business Development Action Plan

Pre-LEAP preparation, market execution, KPIs, and six-month timeline

Item	Details
LEAP 2026	31 August - 3 September 2026
Start date	26 July 2026
Plan duration	6 months + 90-day plan
Owner	Founder / Business Development

1. Objective and outcome

Build a disciplined business development engine that converts selected contractors, suppliers, partners, and investors into qualified meetings, demonstrations, pilots, partnerships, and measurable commercial readiness.

Target outcome

Within 90 days after LEAP: 5 agreed pilots, 3 successful pilots, 2-3 companies ready to pay, 30 active suppliers, one activated partnership, and two documented case studies.

2. Execution principles

- Focus on qualified accounts, not maximum contact volume.
- Every opportunity must have a problem, decision maker, next step, date, and owner.
- Use discovery before a full demo.
- Build supplier coverage around real contractor demand.
- Do not promise capabilities beyond the approved product release.
- Measure progress by conversion and pilot results, not meetings alone.

3. Master timeline

Stage	Period	Primary result
BD foundation	26 Jul - 2 Aug	CRM, target profiles, lists, messages, and meeting process
Materials and outreach	3 - 16 Aug	Segmented materials and 10 confirmed meetings
Qualification and scheduling	17 - 30 Aug	Priority list and 15-20 confirmed LEAP meetings
LEAP execution	31 Aug - 3 Sep	20-25 qualified leads and booked follow-ups
Conversion Sprint	4 Sep - 3 Oct	12-15 meetings and 3 agreed pilots
Pilot preparation	4 Oct - 31 Oct	Supplier pods, baselines, and active pilots
Pilot validation	1 - 30 Nov	5 total pilots and measurable results
Commercial validation	Dec - Jan	3 validated pilots and 2-3 ready to pay

4. Targets and prioritization

Segment	Decision makers	Required next result
Medium contractors	Procurement, Tendering, Commercial, QS, GM	Project/BOQ, second meeting, or pilot
MEP contractors	Procurement, Estimation, Project Management	Relevant package and pilot scope
Fit-out/architectural contractors	Commercial, QS, Procurement	RFQ use case and supplier categories
Suppliers	Sales Manager, GM, Business Development	Catalog, coverage, contact, and RFQ participation
Technology/ERP partners	Founder, Product, Partnerships	Referral, integration, or co-pilot
Investors	Partner, Principal, Investment Manager	Second meeting and information review
Tier	Accounts	Approach
Tier A	20	Deep research, warm introduction, personalized message, direct follow-up
Tier B	40	Semi-personalized outreach and structured follow-up
Tier C	40	Controlled campaigns to test response and identify fit

5. Pre-LEAP action plan

Period	Actions	Deliverable
26 Jul - 2 Aug	Create CRM; define profiles; map contractors, suppliers, partners, and investors	Complete database and priority criteria
3 - 9 Aug	Finalize segment messages, one-pagers, demo script, pilot outline, and booking link	Ready outreach kit
10 - 16 Aug	Launch personalized outreach and request warm introductions	10 confirmed meetings
17 - 23 Aug	Qualify responses, document objections, rehearse discovery and demo	A/B/C priority list
24 - 30 Aug	Confirm meetings, prepare event route, send reminders, and finalize lead form	15-20 confirmed meetings

6. LEAP execution and qualification

Day	Primary focus	Required action
31 Aug	Contractors and strategic partners	Qualify needs and secure follow-up dates
1 Sep	Investors and ecosystem programs	Confirm fit and book second meetings
2 Sep	Technology, ERP, platforms, and suppliers	Identify integration or network opportunities
3 Sep	Priority follow-ups and closing gaps	Confirm next steps before leaving the event
KPI		Target
Fast conversations		60-80
Recorded leads		40
Qualified leads		20-25
Pre-booked meetings		15
Pilot opportunities		5
Partnership opportunities		3
Investors for follow-up		5
Follow-up meetings booked		10-15
Question		Why it matters
What type of organization do you represent?		Select the correct conversation and material
What is your role in the process?		Understand influence and decision access
Where does tendering or procurement lose the most time?		Identify the real problem
Do you have a suitable project or past package?		Test pilot feasibility
Who else must join the next discussion?		Reach the operational and decision team
Can we book the next meeting now?		Convert interest into action

7. Funnel and follow-up

Stage	90-day target	Reference conversion
Named accounts	100	-
Active outreach	70	70%
Replies	30	43%
Discovery meetings	20	67%
Full demos	12	60%
Pilot proposals	7	58%
Agreed pilots	5	71%
Successful pilots	3	60%
Ready to pay	2-3	67%-100%

Day	Action	Purpose
0	Send problem-led personalized message	Create relevance
3	Add a useful question or value point	Provide a new reason to reply
7	Share a use case or short demo video	Build trust
14	Invite to discovery or a Shadow Test	Request a clear decision
21	Send a respectful close-the-loop note	Close the sequence cleanly
45	Re-open with a case study or product update	Use new evidence

8. Weekly operating system

Day	Focus	Output
Sunday	CRM review, research, and prioritization	15 researched accounts and weekly priorities
Monday	Tier A/B contractor outreach	New conversations and introductions
Tuesday	Discovery and product demonstrations	2-3 meetings or demos
Wednesday	Supplier onboarding and partnerships	Supplier coverage and partner actions
Thursday	Follow-ups, proposals, and KPI review	Next steps and weekly report
Activity		Weekly target
Researched accounts		15
New personalized outreach		20
Follow-ups		20
Qualified replies		5
Meetings		4-6
Demos		2-3
New pilot opportunity		1
Partnership meetings		1-2
CRM update		30 minutes daily

9. 30/60/90-day plan

Metric	30 days	60 days	90 days
Follow-up/discovery meetings	12-15	15+	20+
Full demos	8-10	10	12
Pilot proposals	5	5	7
Agreed pilots	3	5	5
Successful pilots	-	1-2	3
Onboarded/active suppliers	10-15	30	30
Companies ready to pay	-	1-2	2-3
Partnership	2 opportunities	Negotiation	1 activated

10. Pilot design

Element	Execution rule
Scope	One package or one previous project; 2-4 weeks
Baseline	Measure the current process before using QUOTAH
KPIs	Time, RFQ completeness, supplier response, and comparison accuracy
Cohort	One contractor plus 5-8 relevant suppliers per category
Governance	Weekly review; separate bugs from feature requests
Success	Measured improvement, user adoption, and documented willingness to pay
Final output	Case study, LOI, or commercial proposal

11. Partnership execution

Model	Use case	Control
Supplier network partner	Access an existing supplier community	Limited data access; no engine logic
Referral partner	Introduces qualified contractors or suppliers	Reward only after verified outcome
ERP/technology integration	Connect QUOTAH to existing workflows	Clear API and permission boundaries
Co-branded pilot	Use a trusted partner to accelerate market entry	Defined scope, duration, and ownership
Industry advisor/channel	Open relevant introductions and validate needs	No uncontrolled promise or exclusivity

12. CRM and opportunity management

Stage	Definition
Target	Suitable named account
Contacted	First outreach completed
Responded	Real response received
Qualified	Problem, decision path, and timing confirmed
Meeting Booked	Calendar meeting confirmed
Demo Completed	Demo delivered and objections recorded
Pilot Proposed	Scope, period, and success criteria submitted
Pilot Agreed	Pilot approved
Pilot Active	Real use case is running
Validated	Success criteria achieved
Commercial Ready	Ready for agreement when legally enabled
Lost	Closed with reason

13. Weekly KPI report

KPI	Weekly target	Actual	Gap reason	Next action
Researched accounts	15			
New outreach	20			
Follow-ups	20			
Meetings	4-6			
Demos	2-3			
Pilot opportunities	1			
Suppliers onboarded	3			
Partnership meetings	1-2			

14. Risks and hiring

Risk	Control
Founder overload	Limit active Tier A opportunities and qualify before full demo
Low reply rate	Improve targeting and message before increasing volume
Long enterprise cycle	Use medium contractors for faster validation
Empty supplier coverage	Build supplier pods around anchor contractor demand
Unstructured meetings	Use discovery questions and end with a specific next step
Weak pilots	Set baseline and success criteria before starting
Lost follow-up	Update CRM within the same day and follow up within 24-48 hours

When to hire

Make the first BD hire when at least two conditions are met: more than 40 active opportunities, more than 8 meetings per week, 5 concurrent pilots, follow-ups delayed beyond 48 hours, or a proven conversion model with funding. Recommended first hire: BD/CRM Coordinator or Supplier Onboarding Specialist.