# Designing a Scalable GTM Engine for Climate SaaS

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# CONTEXT

- This case study explores the go-to-market strategy for a B2B climate technology SaaS platform operating in the ESG space.

- As regulatory pressure increases across Europe through frameworks such as CSRD and Scope 3 disclosure requirements, companies must measure and report their carbon emissions more accurately. This creates growing demand for software platforms that automate carbon accounting, supplier emissions tracking, and sustainability reporting.

- The challenge is not only product adoption, but identifying companies at the exact moment they begin addressing sustainability compliance.

- The goal of this project is to design a scalable outbound system that identifies these high-intent companies and converts them into qualified sales opportunities.

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# Part A: The GTM Blueprint

- Part A focuses on designing the core GTM infrastructure required to generate qualified conversations at scale.

- The system combines lead sourcing tools, AI-driven signal detection, workflow automation, and CRM orchestration to ensure that only high-intent prospects enter the outbound pipeline.

- The strategy prioritizes signal-based prospecting, where outreach is triggered by real business events such as regulatory changes, sustainability hiring, or ESG reporting activity.

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# System Architecture

- Step 1: Apollo + Linkedin Sales Navigator
  - Exporting high-intent leads based on ESG job openings and Sustainability titles.

- Step 2: Clay
  - Waterfall Enrichment: Querying 10+ providers (Prospeo, Hunter, etc.) to ensure 0% bounce rates.
  - AI Scraping: Using Claygent to read 2025 CSR reports for specific carbon gaps.

- Step 3: n8n
  - We create an automated routing. If a lead is High Signal, it goes to the Rep; if General, it stays in a long-term nurture sequence.

- Step 4: Lemlist + HubSpot
  - Multi-channel outreach (Email + LinkedIn) with all data synced to HubSpot for a single source

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# The Quality Filter: High Signal Outreach (1)

A lead is only approved for outreach if Clay detects a minimum of one of the following signals.

- Regulatory & Compliance Triggers (Sustainability & IT Personas):
  - Publication of a new annual CSR or ESG report.
  - Action: Clay reads the report summary and the outbound email references their specific public goals.

# The Quality Filter: High Signal Outreach (2)

- Hiring & Expansion Triggers (Procurement & R&D Personas):
  - Active job postings for roles mentioning "Carbon Accounting", "Scope 3 Emissions"
  - A newly hired Head of Sustainability or ESG Controller (within the last 90 days).
    - Action: Outreach positions Greenly as a tool to accelerate the new hire's impact or automate the tasks listed in the job description.

- Technological Intent (IT & Procurement Personas):
  - Detection of legacy procurement software lacking modern ESG modules via tech stack lookups (e.g., BuiltWith).
    - Action: Messaging focuses on seamless integration and modernizing their data collection.

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# The Hand-off: Sales Readiness (1)

The hand-off must alert the sales rep immediately and provide complete context so they can execute a customized follow-up without manual research.

- The Alert Mechanism:
  - When a lead replies positively or hits a predetermined lead score threshold (e.g., opening an email three times or clicking a pricing link), Lemlist triggers a webhook.
  - n8n catches this webhook and sends an automated message to a dedicated Slack channel, tagging the assigned sales rep.

# The Hand-off: Sales Readiness (2)

CRM Data Points that should be provided to the sales rep in Slack:

- The Intent Hook: The exact automated signal that triggered the campaign
- Contact Context: Verified email address, direct dial phone number, and a direct link to the prospect's LinkedIn profile.
- Company Details: Accurate revenue tier, employee headcount, and geographic region.
- Engagement History: The specific Lemlist campaign they received, the exact subject line that generated the open, and a log of their interaction timeline.

# Weekly Rhythm & KPIs (1)

Top 3 North Star Metrics:

1. Deliverability Rate (Target: >95%):
    - Measured daily using tools like GlockApps.

2. Positive Reply Rate (Target: 2-4%):
    - Measured weekly in Lemlist.
    - This tracks the effectiveness of our Clay signals and our copywriting.

3. Lead-to-Meeting Conversion Rate:
    - Measured weekly in HubSpot.
    - This tracks the efficiency of the Slack hand-off and the sales rep's ability to convert a high-signal reply into a booked discovery call.

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# Weekly Rhythm & KPIs (2)

Every Tuesday, we conduct a pipeline data review.

- We audit bounced emails to assess Clay's verification accuracy.
- We categorize replies to determine which automated trigger is generating the highest Positive Reply Rate.
- We adjust Claygent AI prompts if the system is pulling false positive signals.

# Part B: The 2026 Action Plan

- Part B focuses on the operational strategy required to achieve a defined revenue target.
- By reverse-engineering the revenue goal into pipeline, opportunities, and lead volume, we can determine the scale of outbound activity required and design automated workflows that continuously generate new prospects.

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# 1. Lead Generation Strategy (1) (Example)

- Reverse Engineering the Math

Goal: 600k Closed Revenue
(22% conversion rate)

↓

€2.7M Pipeline Needed ÷
(€20K average deal)

↓

135 Opportunities Required
(20% opportunity rate)

↓

675 Qualified Conversations
(5% qualification rate)

- Thus, overall we need approximately 13,500 leads across 6 months in H1.
- Approximately 112 scraped leads per day

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# 1. Lead Generation Strategy (2)

1. Signal-Based Targeting

- Prioritize companies in scope for CSRD or with significant EU operations and 1,000+ employees / large turnover
- Focus on firms already publishing ESG or sustainability reports, or mentioning Scope 3 and Net Zero in public documents
- Additional intent signals: recent sustainability hires, CSRD/ESG webinars attended, or public SBTi / Net Zero commitments

2. Multi-Channel Approach

- 60% – Cold Email: Primary scalable channel for tailored value propositions and education on CSRD / Scope 3
- 25% – LinkedIn: Connection requests, profile views, and short messages to warm up email outreach and build credibility with sustainability leaders
- 15% – Inbound & Partners: Leverage content on CSRD timelines and Scope 3 education

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# 1. Lead Generation Strategy (3)

3. Persona Sequencing

- Primary persona: Sustainability / ESG leaders (Head of Sustainability, ESG Manager, CSO)

- Secondary personas: CFO and Finance leaders, who care about auditability, risk, and reporting quality under CSRD

- Tertiary personas: Procurement and Supply Chain leaders for Scope 3 supplier engagement and data collection

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# 2. Daily Scraping

| Workflow A: Account & Persona Scraping | Workflow B: Intent Signal Scraping |
|---|---|
| Goal: To continuously find the right people at the right companies (ICP Fit). | Goal: To identify companies demonstrating the right timing (Intent). |
| Tools: LinkedIn Sales Navigator, Apollo | Tools: Web Scraping tools (e.g., Claygent). |
| Process:<br>1. Run daily automated searches for key job titles (e.g., Head of Sustainability) at companies within our ICP.<br>2. Export new contacts that appear in these saved searches. | Process:<br>1.Continuously monitor sources like job boards, industry news sites, and press release wires.<br>2. Scrape these sources for our buying signal keywords (e.g., net-zero commitment,CSRD, supply chain emissions). |
| Output: A fresh, daily list of potential contacts at target accounts. | Output: A daily list of companies that are actively engaging with climate-related topics. |

# 3. Future automations

- Task 1: Automated CRM Data Entry & Cleaning
  - Problem: SDRs spend hours manually typing notes, updating lead status, or fixing formatting
  - Solution: Build a webhook-based (n8n) automation. When an SDR moves a lead to "Contacted" in their email tool, a script automatically updates the CRM, logs the activity, and formats the company name to proper case.

- Task 2: AI-Powered Generation
  - Problem: Personalizing the first line of an email takes 10-20 minutes per lead.
  - Solution: Use the OpenAI API to analyze a prospect's latest LinkedIn post or the company's About Us page. It generate three personalized opening lines and is included in the prompt provided to the Sales Rep in Slack.

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# Thank you!

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