

## ***Revenue Architecture, Switched On***

Capture SPICED and integrate the bowtie – right inside Salesforce

***"A methodology like SPICED brings structure across the customer journey, but it's the right tools that make it stick.***

*Without embedding the framework into the systems your team uses every day, even the best methodology becomes just another training deck. Tools turn theory into habit. SaaSTrack is that tool."*



**Jacco van der Kooij**  
Founder  
Winning by Design

### ***What does SaaSTrack solve?***

Most GTM teams that want to operationalize WbD's Revenue Architecture inside their CRM still build it themselves—Salesforce covers the basics but not SaaS metrics or bowtie out of the box, so companies wire SPICED fields, account-level rollups, and guardrails on their own.

Packaged solutions are emerging, and one of the first non-homegrown alternatives is SaaSTrack. It sits in a distinct category of tools focusing on enforcing business logic natively inside Salesforce during day-to-day work (vs. analytics or “growth guidance” tools that are layered on top).

SaaSTrack implements SPICED (with ratings and exit criteria), an account-based bowtie model (left and right sides), and GTM guardrails (e.g., stage-progression control, locking closed opps). It aims to make the CRM your operational source of truth so leaders can analyze volume, conversion, time, and retention in Salesforce and coach to consistent inputs.

### ***What's great about SaaSTrack?***

**Stops bad data at the source.** Prescriptive fields and rules live in Salesforce, so reps can't bypass stage gates and managers get usable, consistent inputs.

**Account-level bowtie in CRM, including right-side visibility.** Renewal/expansion metrics (GRR/NRR/churn) are modeled in CRM; renewals can be auto-generated and maintained. Leaders get one operational view.

**Plays well with AI/BI.** It works with note-takers that write back to Salesforce. Captured SPICED and normalized bowtie metrics make cleaner fuel for your diagnostics tools and dashboards.

### ***What's not as good?***

**Salesforce-first constraint.** While HubSpot is “possible,” it's not SaaSTrack's current focus. That means fit is strongest for SFDC-led stacks.

**No retro cleanup.** It doesn't repair legacy/dirty data already in your CRM; you'll still need to fix that.

**Assumes CRM-as-system-of-record.** Expects right-side data (renewals/expansion) to live in SFDC. Larger enterprises often keep this in contract/billing/ERP tools and only consolidate in a warehouse or BI tools.

### ***What's missing? (gaps we'd watch)***

**Built-in actioning.** No in-product guidance or copilot—no “what to do next” beyond guardrails. Prioritization/play advice stays with your enablement team and manager workflows (a pro or con, depending on expectations).

**More options to reconcile/accept authoritative right-side data** if your company keeps it in systems outside SFDC.

### ***Our quick take***

SaaSTrack is a Salesforce-native app that implements SPICED, bowtie metrics, and GTM guardrails. Think “prevent bad data at the source so everything downstream works,” not “analyze and guide everything for you.”

### ***Who is SaaSTrack for?***

SaaSTrack is for B2B teams that run on Salesforce and want to operationalize Revenue Architecture quickly – in particular, CROs and GTM leaders who need to align decisions to bowtie performance. It can give Sales and CS leaders guardrails and renewal/expansion visibility inside Salesforce, while Marketing can use it to link their campaigns to LTV. In addition, consultants and advisors might like to take advantage of the tool's prescriptive tracking for diagnostics and recommendations.

SaaSTrack is meant for orgs that have used Salesforce for a while (sub-\$100M ARR to minimize change management issues), though a fresh instance can be enabled as well.

### ***What's unique about SaaSTrack?***

Unlike tools that export and “fix” CRM data later, SaaSTrack embeds business rules and mappings inside SFDC to prevent bad data at the source. It's a 100% native AppExchange app that ships with out-of-the-box reporting and define initiatives to move the needle.

Customers typically light up SPICED in about an hour and deploy broader bowtie tracking after a short test/launch cycle (about a week or two).

### ***How is SaaSTrack leveraging AI?***

While not an AI-native tool itself, SaaSTrack is AI-ready on two fronts:

**If you're using a call recorder, it automatically pulls out SPICED and shoots it into SFDC**, saving rep time and giving managers structured inputs plus scores for coaching and stage exit criteria.

**By enforcing data quality and the bowtie schema across your data**, it provides a clean, reliable dataset that your AI, diagnostic, and reporting tools need for accurate queries, insights, and automation.

## THE PLATFORM

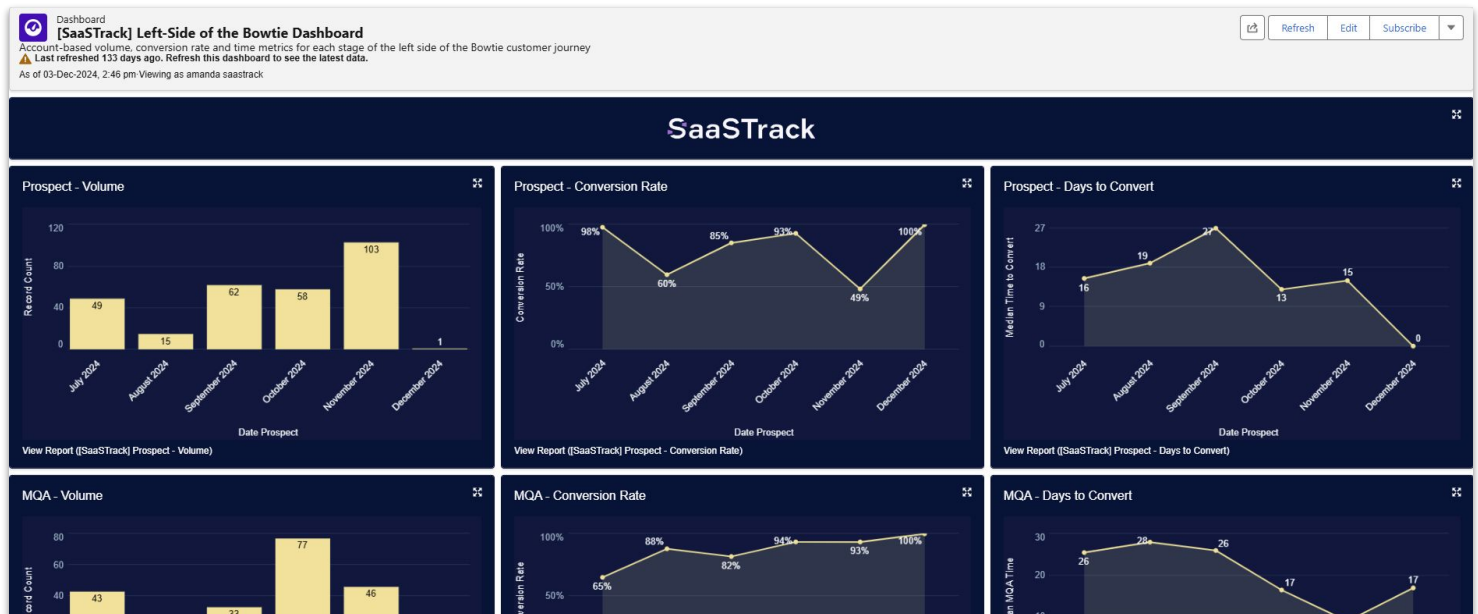
SaaSTrack provides teams with a real-time, account-level view of SPICED and bowtie metrics. Teams can choose which fields, automations, and guardrails to map and which to add to complete their customer journey tracking. These built-in dashboards and bowtie metrics (or their own BI tools) enable GTM decisions directly from clean data.

### Account-Level SPICED View

SPICED	
SPICED Rating ⓘ	<span style="color: green;">■</span>
Situation ⓘ	This Account is in our ICP.
Pain ⓘ	Manual data entry is causing errors and taking too much employee time.
Impact ⓘ	Cost savings of 5%
Primary Impact ⓘ	Cost Savings
Critical Event ⓘ	Regulatory changes are forcing a purchase decision.
Decision Criteria ⓘ	Whoever can implement faster will win this deal.
Decision Process ⓘ	Champion must get purchase approved by manager.
SPICED Score ⓘ	122
Situation - Rating ⓘ	1 - ICP
Pain - Rating ⓘ	1 - Solvable pain
Impact - Rating ⓘ	3 - Significant
Critical Event - Rating ⓘ	5 - Mandatory Event
Decision - Rating ⓘ	2 - Multiple DMs with defined budget

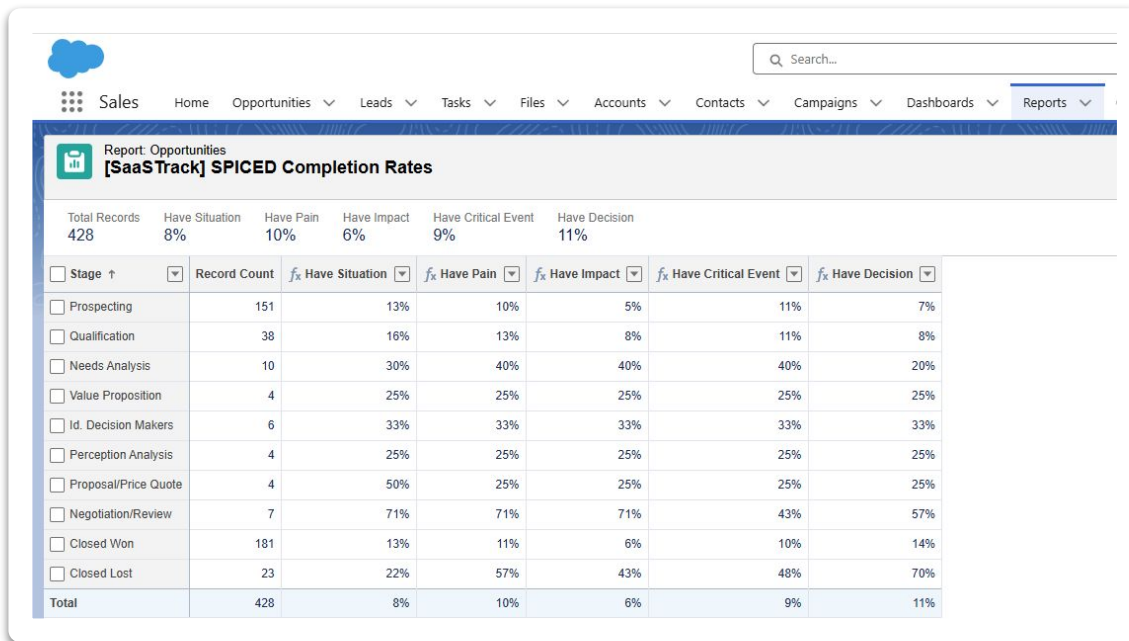
For each account, teams can get a quick overview of SPICED details, scores, and ratings (overall and per component). Managers can view SPICED in real time to enable better coaching and deal reviews.

### Bowtie Dashboards



Track volume, conversion, and time metrics for each stage out of the box. Spot changes and gaps to see where improvements can be made.

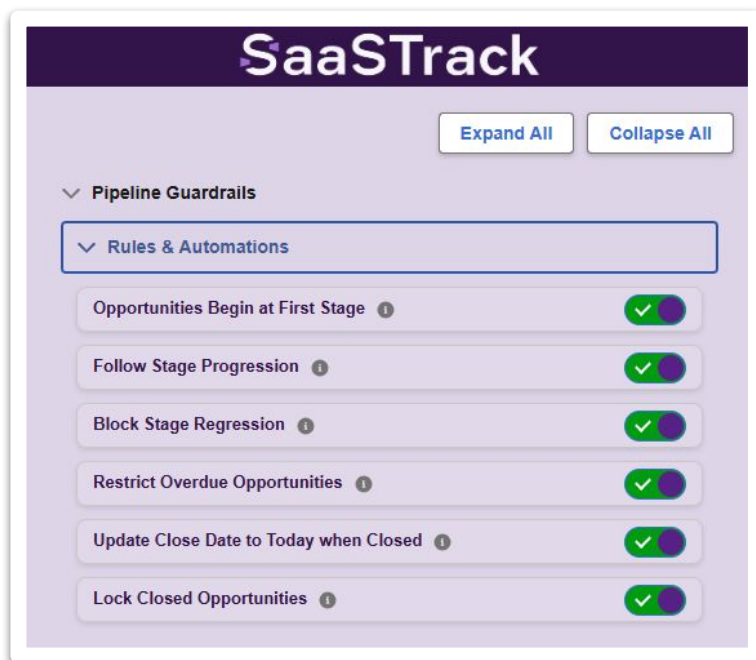
## SPICED Completion Rates by Stage



Report: Opportunities [SaaSTrack] SPICED Completion Rates						
Total Records 428		Have Situation 8%	Have Pain 10%	Have Impact 6%	Have Critical Event 9%	Have Decision 11%
<input type="checkbox"/> Stage ↑	Record Count	<input type="checkbox"/> Have Situation	<input type="checkbox"/> Have Pain	<input type="checkbox"/> Have Impact	<input type="checkbox"/> Have Critical Event	<input type="checkbox"/> Have Decision
<input type="checkbox"/> Prospecting	151	13%	10%	5%	11%	7%
<input type="checkbox"/> Qualification	38	16%	13%	8%	11%	8%
<input type="checkbox"/> Needs Analysis	10	30%	40%	40%	40%	20%
<input type="checkbox"/> Value Proposition	4	25%	25%	25%	25%	25%
<input type="checkbox"/> Id. Decision Makers	6	33%	33%	33%	33%	33%
<input type="checkbox"/> Perception Analysis	4	25%	25%	25%	25%	25%
<input type="checkbox"/> Proposal/Price Quote	4	50%	25%	25%	25%	25%
<input type="checkbox"/> Negotiation/Review	7	71%	71%	71%	43%	57%
<input type="checkbox"/> Closed Won	181	13%	11%	6%	10%	14%
<input type="checkbox"/> Closed Lost	23	22%	57%	43%	48%	70%
<b>Total</b>	<b>428</b>	<b>8%</b>	<b>10%</b>	<b>6%</b>	<b>9%</b>	<b>11%</b>

Inspect SPICED completion by stage to see where teams are falling short and key details or qualification components are missed. Use this data to coach to specific skills and stages.

## Pipeline Guardrails



Toggle pipeline guardrails on or off to enforce rules and avoid bad data at the source. Prevent things like stage skipping or edits to closed opps.

# Building it yourself vs. SaaSTrack

## What you intend to build

You kick off with a clear vision: wire revenue architecture into Salesforce so you can make better decisions and improve performance. You want an account-based bowtie for both acquisition and retention, SPICED fields, and guardrails to keep stages honest—so your team and leaders have one language and one set of numbers.

It feels achievable because, on paper, you already *have* the data, and this is exactly what Salesforce should enable when done right. Plus, you have the resources and expertise in house – why pay for something when your team can do this?

## Reality of building in-house

The grind sets in. Timelines stretch as your admins “interpret the book,” definitions differ across teams, and data goes bad during production—so you’re still stitching together ad-hoc reports. Right-side tracking lags or lives outside Salesforce, making NRR/GRR conversations uncomfortable when the board wants answers.

The mood shifts from optimistic to pressured. You’re wasting hours of specialist time, and meanwhile, you’re still flying blind because things don’t work as they should yet. RevOps is frustrated because they’ve become a ticket queue instead of the diagnostic engine you need.

*“I wish tools like SaaSTrack and frameworks like Revenue Architecture had existed when I first started in Revenue Operations back in 2011. Sophisticated models, like Revenue Architecture, as well as **tools like SaaSTrack** simplify adoption and execution at scale... truly game changing for RevOps practitioners.”*

– Gianluca Pucacco, VP, Global Sales Operations, Facebook

## With SaaSTrack

SPICED is live in about an hour – captured via your AI notetaker, rated, and reportable – and the full bowtie follows in days, not quarters. SaaSTrack starts enforcing revenue architecture frameworks inside Salesforce where you live day-to-day.

Activity normalizes to the account, so your bowtie metrics reflect how B2B buying works, and guardrails prevent stage skipping or edits to closed opps. Renewals and expansions are auto-generated and maintained in the CRM, giving your CSMs a live book of business and leaders a view that connects left and right sides. Managers can use SPICED ratings and baselines for better coaching and forecasting.

## Impact

You can set it and forget it, adding custom reports on top of the clean operational data pulled directly from Salesforce. Everyone on your GTM team can start running analysis with their own BI and AI tools.

RevOps is free from plumbing to run diagnostics, do experiments, and give quarterly guidance. Having data you can trust helps teams follow the processes you put in place. Things feel calmer and more in control because the system does the heavy lifting while you focus on decisions (instead of definitions or data clean-up).

The CRO can walk into board meetings with numbers they can defend and a before/after story for every initiative (e.g., “we did training to lift CR4, and this is the impact it made”). There’s more clarity and momentum because your team is finally moving the needle, not trying to fix the needle.

# How the Platform Supports the WbD OS

## *Turning methodology into habit*

01

**SaaSTrack embeds Revenue Architecture inside Salesforce** so teams don't have to "interpret the book" or rebuild the model from scratch. Instead of exporting data to fix it later, SaaSTrack enforces business logic in the CRM during day-to-day work—so milestones, metrics, and handoffs are captured correctly the first time. This shifts RevOps from post-production cleanup to running a system that leaders can rely on for diagnostics, forecasting, and quarterly guidance.

02

**It starts with SPICED – and coaching.** SaaSTrack creates the SPICED fields and exit criteria, then pairs with note-takers that write back to Salesforce so calls auto-populate the text fields. Managers apply ratings that roll up into a score (useful for coaching and as stage gates) while out-of-the-box reports let you slice SPICED quality by stage, segment, team, or manager. This turns conversations into structured, operational data. Managers have baselines for coaching, and they can follow and measure SPICED in real time.

03

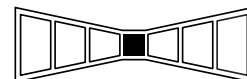
**Next is the bowtie.** SaaSTrack rolls activity to the account level so volume, conversion, and time metrics reflect how B2B buying works (many people, one account). It handles the many-to-one normalization from leads/contacts to accounts, avoids double-counting, and tracks both the left (acquisition) and right (renewals/expansion) sides inside Salesforce. That makes account-based MQX→SQL→Opp conversion meaningful, while still letting teams report on person-level funnels if needed.

04

**Guardrails close the loop.** Toggle-based rules (e.g., stage-progression control, locking closed opps) prevent bad data and reinforce the playbook in real time – just as WbD prescribes. For the right side, SaaSTrack can auto-generate and maintain renewal/expansion opportunities so CSMs see a current book of business in the CRM. Implementations are fast and designed to map to WbD's common data schema, feeding downstream analytics and AI and growth-guidance tools without heavy manual prep.

*"What I love about this solution is that you're taking CRM data by the scruff of the neck and saying, 'Let's get to the root cause and apply business logic within Salesforce, so that dirty, incomplete, often erroneous data doesn't come into play in the first place.' By locking down some of the business rules in the CRM itself, you're driving process at the heart of the operational layer rather than trying to fix it after the fact. That concept is absolutely brilliant."*

– **Dr. Dan Patterson**, Chief Innovation Officer, Winning by Design





# The WbD Verdict — SaaSTrack

**Quick take:** SaaSTrack is a 100% Salesforce-native way to make Revenue Architecture “stick.” It enforces business logic at the source to support bowtie metrics and SPICED. This allows your teams and existing BI/AI tools to work off of clean operational data.

**Best for:** Salesforce-based B2B teams adopting WbD who want trustworthy, account-level revenue data without building it in-house.

**Overall rating:** ★★★★★ 7.9/10

**Why this score:** Strong at prescriptive WbD alignment and native data enforcement; lighter on execution guidance. Assumes right-side data lives in SFDC. Doesn't ship its own AI—by design, it feeds others. Great for SFDC orgs standardizing on WbD; less relevant if you're HubSpot-led or not adopting Revenue Architecture.

## PROS

- **Enforces WbD frameworks natively in Salesforce.** SPICED capture + manager ratings; account-level bowtie on left and right sides; exit criteria and GTM guardrails to prevent bad data.
- **Right-side rigor.** Auto-generated renewals/expansions and a real book-of-business in CRM; GRR/NRR visible next to the left side.
- **AI-ready foundation.** Doesn't try to be the AI; instead, produces the clean, structured data that diagnostics and AI tools need
- **Only AppExchange app implementing Revenue Architecture** (per vendor); +10% conversion claim tied to SPICED.

## CONS

- **No built-in execution guidance / copilot.** Doesn't prescribe day-to-day actions; you'll still rely on your enablement, coaching, etc.
- **No AI insights.** Pairs with AI note-takers/analytics. If you expect an in-product AI assistant, this isn't it.
- **Salesforce-first.** HubSpot support is secondary; if you're HubSpot-led, fit may be limited.
- **Assumes CRM as system of record**—no retro cleanup; limited fit for enterprises that keep right-side data outside SFDC

## WHO IT'S FOR

- **Salesforce-led B2B SaaS (<\$100M ARR) and smaller orgs** with mature process, ready to embrace SPICED + bowtie
- **CRO/RevOps** aiming to prevent bad data at the source and feed existing BI/AI clean inputs
- **Teams willing to keep right-side data** (renewals/expansion) in SFDC

## WHO IT'S NOT FOR

- **Teams seeking an end-to-end RevOps OS** or copilot
- **HubSpot-centric** or non-recurring/transactional motions
- **Enterprises that keep right-side data in billing/ERP** and only consolidate in BI/warehouse



## WBD APPROVED

*Recognized as a strong fit for Salesforce GTM teams seeking measurable left-to-right growth and reliable data insights.*

## CORE FEATURES WE VERIFIED

**SPICED fields** + manager ratings and stage exit criteria (in CRM); **bowtie metrics** (left + right) with many-to-one normalization; **guardrails** (toggle on or off for rules like stage progression; locking closed opps); **maintenance of renewals** and expansions; **out-of-the-box reporting** for volume, conversion, time, retention

## PRICING SNAPSHOT

- **Plans start at \$1,500** per company per month
- **To learn more,** [book a meeting](#)

## HOW IT COMPARES (HIGH-LEVEL)

- **SaaSTrack vs. building in house:** SaaSTrack wins on WbD enforcement, account-level bowtie, and accurate data capture with right-side visibility; in-house on unlimited flexibility and bespoke edge cases (with ongoing maintenance trade-offs)

## HOW WE SCORED:

Category	Weight	Score
Data quality at the source	30%	9/10
WbD alignment and operationalization	20%	9/10
Account-level bowtie modeling (left + right)	20%	7/10
Decision support (reporting + insights)	15%	7/10
Ecosystem fit	10%	6/10
Model and platform fit	5%	6/10
Overall		7.9/10



To learn more about **SaaSTrack**

Visit [saastrack.ai](https://saastrack.ai) or [schedule a call](#)



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