

— THE SAMPLE TOOLKIT PACK —

SUCCESS

RAPID-RESPONSE TOOLS TO FIX FUNNELS
AND VALIDATE IDEAS



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Sample Toolkit Pack

Rapid-Response Tools to Fix Funnels and Validate Ideas

When your funnel misfires or your product bets feel risky, you don't need theory—you need a proven reset system. This pack is a curated preview of my full toolkit, showing you how to diagnose problems fast, rally your team, and make smarter bets on what to build next.

What's Inside

1. Executive Brief – The 72-Hour Reset System

A roadmap for diagnosing and realigning underperforming funnels. Use this to align your leadership team in minutes, not weeks.

2. Breakpoint Map – Lite Version

Pre-built template to spot exactly where your funnel is breaking. Includes sample data to show how gaps surface in real time.

3. Reset Execution Board – Lite Version

A tactical sprint board for assigning owners, KPIs, and deadlines. Two sample plays are included to demonstrate how teams can act immediately.

4. Companion Guide – How to Run a Reset Meeting

Step-by-step walkthrough for using the Breakpoint Map and Execution Board in a live reset session. Plain language, designed for speed and clarity.

5. Bonus Tool – MVP Readiness Mini-Scorecard

A trimmed-down version of the full Scorecard, covering 4 critical criteria to assess whether an MVP idea is worth pursuing. Perfect for quick triage before deeper validation.

Why This Pack Matters

- **Real-World Tested:** Built from systems I've used with startups and enterprise teams under pressure.
- **Hands-On:** Templates and guides you can actually use today.
- **Boardroom Ready:** Designed to align executives, managers, and operators around facts—not opinions.

Result: A fast, practical taste of how my full toolkit helps teams reclaim momentum and de-risk decisions.

The 72-Hour Reset System

Rapid-Response Framework for Fixing Misfiring Funnels

When your funnel misfires, waiting for the next quarterly plan review is death. You don't need theory—you need a reset that diagnoses the breakpoints, realigns the team, and relaunches with momentum. This framework gets you there in 72 hours flat.

Step 1: Diagnose (Day 1) – Find the Breakpoints

- **Pull the data:** GA4, CRM, pipeline velocity.
- **Spot the leaks:** Funnel stage drops, attribution gaps.
- **Get the pulse:** Sales + CS quick survey (“What’s blocking deals this week?”).
- **AI Role:** Flag anomalies, summarize signals, surface top 2–3 problems.

Deliverable: *Breakpoint Map* (where the funnel is failing).

Step 2: Realign (Day 2) – Reset the Playbook

- **Cross-functional huddle (1 hour):** Marketing, Sales, Product, RevOps.
- **Set urgent priorities:** No more than 1–2.
- **Pick fast-impact plays:**
 - Marketing: tighten targeting, re-message, pause waste.
 - Sales: re-sequence outreach, tighten qualification.
 - Product/CS: activate quick wins, deploy case studies.
- **AI Role:** Recommend plays from past resets, generate updated play cards.

Deliverable: *Reset Plan* (3–5 tactical plays, owners assigned).

Step 3: Relaunch (Day 3) – Execute Hard and Fast

- **Execution sprint:** Every play has an owner and 2-week deadline.
- **Communication blast:** Share reset narrative with teams + execs.
- **Dashboard refresh:** Track only reset KPIs, not the full funnel.
- **AI Role:** Auto-generate reset dashboard, send daily nudges, flag blockers.

Deliverable: *Reset Execution Board + Dashboard.*

Governance

- **72 hours start-to-finish** → Diagnose, Realign, Relaunch.
- **Daily async updates** → Managers update progress in <5 min.
- **Weekly exec review** → Validate improvement or re-pivot.
- **Exit criteria:** Metrics stabilize/improve for 2 consecutive weeks.

Why It Works

- **Clarity fast:** Breakpoints exposed in 24 hours.
- **Action now:** Priorities limited to 3–5 tactical plays.
- **Momentum regained:** Teams execute within days, not quarters.
- **Proven loop:** Each reset logs into the playbook, compounding insights.

Result: Misfiring funnels don't derail growth—they trigger a disciplined, rapid reset that restores performance in 3 days.

Breakpoint Map (Snapshot)

The Breakpoint Map is your funnel diagnostic tool. It shows where conversion rates fall short of targets, highlights suspected issues, and assigns ownership for fixes. Use it as the starting point in any reset session.

How to use it: Fill in current conversion rates, calculate the variance, and capture suspected issues. Assign an owner to each stage so accountability is immediate.

Funnel Stage	Conversion Rate Target (%)	Current Conversion Rate (%)	Variance (%)	Notes / Suspected Issues	Owner
MQL → SQL	40%	25%	-15%	Lead quality too low from paid social	Marketing Ops
SQL → Opportunity	30%				
Opportunity → Closed Won	50%				

Reset Execution Board (Snapshot)

The Reset Execution Board turns your reset plan into action. Each play gets an owner, KPI, and deadline so accountability is crystal clear. Below is a snapshot version with one sample row filled in. Use this board to cut through ambiguity and ensure every reset play moves from discussion to measurable execution within 2 weeks.

How to use it: Log each priority play, assign a clear owner, set a ≤ 2 -week deadline, and define a KPI. Track daily notes, blockers, and status in one place.

Priority Play	Owner	Start Date	Deadline (≤ 2 weeks)	KPIs (Success Measures)	Daily Progress Notes	Blockers	Status
Tighten Paid Search Targeting	Growth Lead	03/01	03/14	MQL $\rightarrow$ SQL Conversion from 25% $\rightarrow$ 35%	Initial campaign rebuild complete	Awaiting new creative assets	In Progress
Refresh Sales Pitch Deck							
Activate Case Study in Nurture							

Companion Guide: How to Run a Reset Meeting

The Companion Guide provides a step-by-step agenda for running a reset meeting that aligns teams quickly and sets clear priorities. It ensures the Breakpoint Map and Reset Execution Board are used effectively, so the session produces decisions—not just discussion. Use this guide to turn a 60-minute meeting into a high-clarity launchpad for a 2-week sprint that restores momentum.

Before the Meeting (Prep)

- Pull the **Breakpoint Map** with current funnel metrics.
- Ask Sales + CS to share **top 3 blockers** they're seeing.
- Have Marketing + Product prep any **quick-win ideas**.
- Share materials in advance so time is spent on alignment, not discovery.

During the Meeting (60 Minutes Max)

Step 1 – Frame the Reset (10 min)

- State the goal: *"We are here to identify the biggest funnel breakpoints and agree on 3-5 plays to fix them."*
- Review the Breakpoint Map and confirm the top 2-3 gaps.

Step 2 – Select Plays (30 min)

- Brainstorm fast-impact actions across Marketing, Sales, and Product.
- Use the **Reset Execution Board** to log candidate plays.
- Debate only priorities—capture other ideas for later.

Step 3 – Assign Ownership (15 min)

- For each chosen play: assign one **Owner**, set a **2-week deadline**, define a **KPI**.
- Capture notes on blockers or dependencies.

Step 4 – Communicate Next Steps (5 min)

- Summarize chosen plays, owners, and deadlines.
- Confirm everyone understands the reset narrative.

After the Meeting (Follow-Through)

- Share the updated **Execution Board** with the team.
- Kick off the 2-week sprint immediately.
- Use async updates for daily progress; no extra meetings.
- Report weekly to execs on reset progress.

Result: A structured, high-clarity meeting that gets everyone aligned in 60 minutes—and launches a focused sprint that restores funnel performance.

MVP Readiness Mini-Scorecard (Snapshot)

The MVP Mini-Scorecard is a lightweight validation tool for assessing early-stage product ideas. It focuses on four critical factors—market pain, GTM clarity, resource alignment, and customer evidence—so teams can quickly gauge whether an idea is strong enough to advance or needs more validation before investment. Use this when you need to separate promising ideas from distractions in under 30 minutes.

How to use it: Score each criterion from 0-10, multiply by the weight, and total the scores. Use notes to capture evidence. Quickly shows if an idea should advance, validate further, or be reconsidered.

Category	Criteria	Weight (Points)	Score (0-10)	Weighted Score	Notes / Evidence
Market Pain & Demand	Severity of Problem	10	7	70	Customers report major workflow gaps
GTM Viability	ICP Clarity	10	8	80	Clear buyer persona: HR Directors in mid-market
Resource Alignment	Team Capability	10	6	60	Lacks backend engineer capacity
Validation Signals	Customer Evidence	10	9	90	50 sign-ups on waitlist in 2 weeks

This is a trimmed 4-criteria preview. Download the full 10-criteria MVP Readiness Scorecard for complete validation.

Instructions

1. Fill in **Score (0-10)** for each criterion based on evidence and discussion.

2. **Weighted Score** = Score × Weight.
3. Total possible points = **40**.
4. Readiness Levels:
 - **32–40**: Strong signal → Advance MVP
 - **24–31**: Promising → Validate further
 - **<24**: Weak → Reconsider idea
5. Use the **Notes column** to capture rationale, evidence, or objections.

This trimmed version is perfect for quick triage before using the **full 10-criteria MVP Readiness Scorecard**.

Closing Note

This pack is just a **preview from the full Toolkit Series** I've developed and deployed across startups and enterprise teams.

If a sample like this demonstrates what I can deliver in 72 hours, imagine the systems, clarity, and impact I can bring to your leadership team.

Result: Repeatable growth frameworks, boardroom-ready clarity, and execution speed that moves organizations forward.

Next Step:

Let's Connect → sterling@sterlingphoenix.net

If you're seeking a leader who can diagnose problems fast, build scalable systems, and rally teams to deliver results—you've just seen how I work.

You've got this. And we've got you.

This isn't just another tool. It's a spark.

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