
STRATEGIC RESET PLAYBOOK

RESET

A RAPID-RESPONSE FRAMEWORK FOR
DIAGNOSING AND REALIGNING
UNDERPERFORMING FUNNELS



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Strategic Reset Playbook

A Rapid-Response Framework for Diagnosing and Realigning Underperforming Funnels

The playbook is designed to help you triage misfiring GTM strategies and reset execution focus in 72 hours.

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

- **Data Review:**
 - Pull funnel conversion data (GA4 + CRM).
 - Identify stage-level drops (e.g., MQL → SQL, SQL → Closed Won).
 - Check attribution splits—are we overspending on low-quality sources?
- **Team Pulse:**
 - Run a 5-question async survey (“What’s blocking deals this week?”).
 - Collect frontline sales + customer feedback.
- **AI Role:**
 - Highlight anomalies in funnel conversion rates.
 - Summarize survey responses into themes.

Deliverable: Breakpoint Map (top 2–3 problem areas).

Funnel Stage	Conversion Rate Target (%)	Current Conversion Rate (%)	Variance (%)	Notes / Suspected Issues	Owner
Awareness	-				
MQL	25%				
SQL	40%				
Opportunity	30%				
Closed Won	50%				
Expansion	15%				

Step 2: Realign (Day 2) – Reframe the Funnel

- **Strategic Huddle:** 1-hour cross-functional sync (Marketing, Sales, Product, RevOps).
- **Reset Goals:** Agree on 1-2 urgent priorities (e.g., “Fix MQL quality,” “Shorten deal cycle”).
- **Play Selection:** Pick fast-impact plays from library (examples below).
 - Marketing: tighten targeting, re-message offers, pause wasteful spend.
 - Sales: re-sequence outreach, tighten qualification, refresh pitch assets.
 - Product/CS: activate quick-win features, deploy case studies, upsell triggers.
- **AI Role:**
 - Suggest “lookalike” fixes based on past resets.
 - Generate updated GTM play cards (steps, owners, KPIs).

Deliverable: Reset Plan (3–5 tactical plays).

Priority Play	Owner	Start Date	Deadline (≤ 2 weeks)	KPIs (Success Measures)	Daily Progress Notes	Blockers	Status (Not Started / In Progress / Done)

Step 3: Relaunch (Day 3) – Execute & Communicate

- **Execution Sprint:** Assign owners + deadlines (all within 2 weeks).
- **Communication Blast:** Reset narrative sent to teams + execs (“Here’s what we’re fixing, why, and how”).
- **Dashboard Update:** Reset dashboard tracks only the new priorities (not the whole funnel).
- **AI Role:**
 - Auto-generate dashboards filtering on reset KPIs.
 - Send daily nudges to owners on progress and blockers.

Deliverable: Reset Execution Board + Communication Pack.

Governance & Cadence

- **Reset Window:** 72 hours from diagnosis to relaunch.
- **Checkpoints:** Daily async updates, weekly executive review.
- **Exit Criteria:** Reset is considered complete once funnel metrics stabilize or improve for 2 consecutive weeks.
- **Continuous Learning:** AI logs reset actions and outcomes into a playbook for future reference.

Why This Works

- **Clarity fast:** Teams stop debating symptoms and see the exact breakpoints.
- **Focused action:** Reset priorities are limited to 3-5 tactical plays, not a laundry list.
- **Momentum regained:** Execution begins within 72 hours, restoring confidence.
- **Scalable:** Works for a 20-person startup or a 500-person division.

Result: A proven, rapid-response reset system that transforms underperforming funnels into aligned, momentum-driving machines in just 3 days.

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

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

One that's meant to ignite clarity, courage, and momentum
so you can rise with intention—on your terms..

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