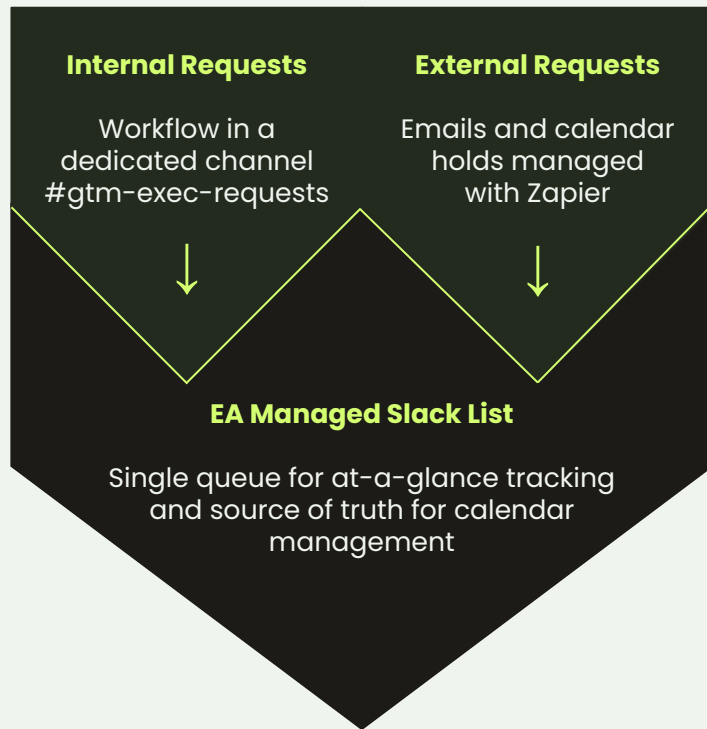


GTM Case Study: Inbound Requests & Prioritization System

A centralized request management system for simplifying inbound requests, automating triage, and protecting the executive's time.



Workflow & Automation

Internal - Slack



Standardize questions to capture key information through a Workflow form, limiting repetitive follow-up:

- **The Who** (which team is making the request, which exec is needed)
- **The What** (customer account, support type, ARR/deal size, stage of deal)
- **The How** (urgency level, customer preferred dates, what we need from the exec in this meeting)

External - Zapier



Leverage automation to limit overhead for executives and EA managing requests while reducing missed messages:

- **Email or calendar hold hits the inbox**, automation triggers based on keywords or alias used.
- **Zapier creates a Slack list entry pulling from email content** to streamline into existing system.
- **EA reviews every entry in parallel** with all other pending requests.

How the EA Operates

A meeting evaluation framework is designed with the executive and empowers the EA.

Urgency	Justification	ROI	
Strong Late stage, churn risk, or closing	Strong Economic buyer, decision maker, active competitor	Strong High ARR, low effort ask	
Moderate Mid-stage, active evaluation underway	Moderate Senior influencer, not final decision maker	Moderate Mid ARR or moderate effort required	
Weak Early stage, exploratory, no timeline	Weak Champion or junior team member	Weak Low ARR relative to pipeline or high effort ask	
2-3 Strong Confirm Priority schedule, no caveats	1 Strong Flag Schedule, flag potential gap to the exec	1-2 Moderate Negotiate Push back on timing, propose delegate	Weak Push Back Decline with a specific reason

Guiding Principles

Exec-defined Priorities

Deal support and customer meeting slots are set based on exec's current focus areas, reviewed quarterly.

EA Controls the Calendar

Context given upfront, nothing added without EA approval. Execs never receive generic holds.

Escalation Path

For genuine emergencies, the request is still routed through the EA, who provides exec with details and proposed accommodation strategy.

Review, Prep, & Forward Thinking

Review Requests ASAP

The EA prioritizes reviewing all incoming requests as they arrive. Scheduling is mission-critical for GTM leaders. If a request sits without action for 24h, the EA receives an automated Slack reminder to follow up or decline.

Prep & Team Coordination

Once evaluated and scheduled, EA partners with GTM team to support exec preparation ahead of meeting. This includes coordinating materials, scheduling internal briefings, or clarifying context.

Weekly Digest Automation

The EA receives an automated Slack reminder showing the upcoming week's meetings and any requests awaiting action. This mechanism is another checkpoint to ensure nothing falls through the cracks. The EA confirms all relevant information and compiles it into a tailored update for each exec.

Overview

This is a system we grow in to

First step is implementing the workflow. As we build trust in the system, the EA earns credibility to negotiate and brief execs.

Never making decisions alone

Context is everything, and the EA doesn't work in a silo. Routing questions through AEs and CSMs limits interruptions for the exec and strengthens the EAs judgement over time.

Continuity is built in

Coverage for the EA doesn't depend on maintaining a separate OOO doc. Granting access permissions to existing systems enables smooth knowledge transfer.

One system, multiple execs

The single workflow can support any number of execs. With filtered views, execs who want visibility get a version of their own board. And for the EA, everything lives in one place.