

Delivering Value



Growth Coaching Curriculum



Developed by Andrew Capland



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Hey, I'm Andrew. I'm a former 2x Head of Growth. In June 2021, I left my full-time job to build my own solopreneur biz. Now, I coach and mentor other members of the growth community.

Like many of you, I was super inspired by the Mochary Method Curriculum. I realized that I used a similar program with my coaching clients too. It was mostly in my head. But I had shared many parts of my operating system in bits and pieces on LinkedIn, and other places.

I compiled everything here, and I'm excited to share it with you. This document shares the 80/20 on a bunch of different topics I usually see with first-time heads of growth.

The content here is bite-sized and it's not meant to be read front to back. It's designed to give you a jump start when you're stuck. So pick and choose what's most helpful to you right now.

If you're interested in working together, visit Delivering Value for more info or get started now.

Andrew's coaching bio

Hey, I'm Andrew

I'm a former 2x Head of Growth and have spent the last 15 years working in B2B SaaS. My journey includes high-volume businesses like HubSpot, Wistia, & Postscript — and some other startups that didn't make it.

Along the way, I've [started & scaled growth teams](#), run hundreds of experiments across every area of the funnel, and made a million mistakes.

My work has been featured on [OpenView](#), [Growth Hackers](#), [Productled.com](#), [Product-led Growth Collective](#), [HubSpot](#), and [Mixpanel](#).

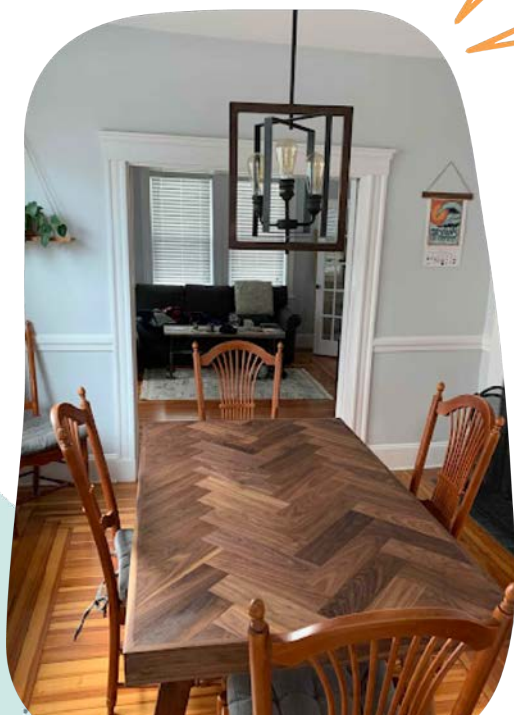
I find the process of growing a company is incredibly fulfilling. From learning about the levers and channels, understanding the customers and their jobs-to-be-done, delivering value in creative ways, and removing friction points along the journey.

But my real passion is helping people around me get better. I get incredible fulfillment from teaching systems and frameworks to help others succeed in growth.

So in June 2021, I decided to make a big change. I left my full-time job as head of growth to build my own solopreneur business - Delivering Value.

Now I spend my days [coaching heads of growth](#), [advising product-led SaaS teams](#), and making [digital products](#) for growth teams. I absolutely love it. Helping others gives me energy.

That's me professionally, but work is just one part of me. When I'm not working at my desk - I also really like working with my hands. I'm into woodworking. The workshop is my happy place.



Here's one of my favorite projects — our dining table. Black walnut in a herringbone pattern.

When I started my own business, I wanted to name it something wood related to keep me grounded. The top contenders were Black Walnut and Growth Rings.

I ended up choosing Delivering Value because it represented my philosophy on growth, which is less focused on the tools and tactics to grow. And more focused on learning what's most valuable to customers, then exploring how to showcase that value in creative ways to grow the business.

I'm also a huge believer in the power of mindfulness and meditation. I look for opportunities to weave mindfulness into my day and my coaching practice. You can [read more about my values here](#).

I live just outside of Boston with my wife Lindsay and our 2yr old son, Cameron. Below is a pic of our amazing little family. We took it on Cape Cod in May 2022.

I decided to focus on my business full-time so I could have more flexibility in my schedule and spend more time with them — one of my best decisions.



What's Coaching Like?

I've spent the last 15 years of experience working at B2B SaaS companies in/around growth roles. Now, I use that experience to mentor others.

I help people leading growth teams increase their influence, their operating system, and their confidence.

My content and programs are designed to help people leading growth teams at early-stage companies. They are either leading small teams or about to scale their team - and looking for a support system to lean on for help and guidance. Usually, their title is Head of Growth, but sometimes Growth Marketer or Growth Product Manager.

Before we start working together, I send along an intake form that asks more questions about you, your company, and what you're hoping to get out of coaching.

Expect this to take 15-20 mins of your time. It will provide some good reflection for you, share helpful context with me, and provide a great foundation for our engagement.

We'll use that intake form to identify a mix of tactical, strategic, and leadership skills to work on together. Every client finds their own balance. But it's usually somewhere around 25% solving growth problems, 25% working on your operating system, and 50% leadership/career guidance specific to these roles. You'll need all three to be successful!

A typical session is focused on tackling problems specific to growth teams - and covers a mix of tactical, strategic, and leadership skills depending on the situation.

My personal style as a coach is to ask questions to help you organize your thinking, act as a thought partner for you to validate ideas & approaches, and (when appropriate) make specific recommendations, or point out landmines based on my experience.

Interested in learning more?

Read about my [coaching programs](#)

Browse my [client case studies](#)

Or, [schedule a conversation](#) to see if we're a fit.

Creating Your Strategy

What to Include

Below is what I typically include in a strategy doc along with a few ideas on how to refine your perspective for other members of leadership.

The goal here is to summarize for “non-growth folks” on the leadership team. So lean towards clarity and conciseness when in doubt.

Here’s what to include:

1. The mission and vision for growth in your organization:

Writing a mission and vision for growth in your organization is a critical step. This will help the rest of your leadership team understand what growth will be focused on, and what you’re working towards.

Your mission describes what you want to do now - and why. IE - areas of the growth model you’d like to focus on and themes of initiatives you believe would be most impactful.

Your vision describes what the future looks like if you are successful. See if you can refine the story further for a “non-growth” audience. Describe both how the business operates in this future world, as well as what the user journey looks like. That’s your goal.

2. Strategic direction for growth in your organization

This is where you can include:

- A high-level summary of what you’ll be focused on
- The highest-impact levers you want to focus on (and why)
- The specific “bets” you plan to make

3. What success looks like (goals)

As a leader, you want to hold yourself accountable and communicate how you’re thinking about success to others. Try to define both qualitative and quantitative outcomes to track your progress.

4. Roadmap

You’ve listed the high-level initiatives you’ll be focused on above. Now go a layer or two deeper by listing out the first three-six months of work and the details involved in those projects.

Keep this high level but include the milestones so your leadership team can understand the important checkpoints.

5. Resources you'll need to be successful

Communicating what you'll need to be successful will help you align with other teams and gain access to the resources you need. It will also allow you to know if you won't have those resources, so you can revise your roadmap and goals if needed.

Every business will have resource constraints but this will help describe the optimal state and help you explain trade-offs down the road.

This might include

- People: engineers, designers, marketers, etc
- Tools: for help with data analysis, project management, a/b testing, or other projects
- Dollars: to help with outsourcing, implementation, or any of the above

6. Threats to your plan

Members of the leadership team are often curious about what might stop you from being successful. So this is where you can list out of the potential landmines you may encounter and how you plan to handle them.

Outline and Begin Tracking Your Growth Model

Before we can identify areas of opportunity to include in your strategy we need to first understand how users flow through a product-led model.

In [this video](#), I cover the two most common types of product-led models and explain how users flow through them.

Once you understand how users move through the model, we can begin to track its performance and find opportunities.

[In this video](#), I talk about going 0-1 with your product-led tracking.

- I share the high-level monthly report I use to find opportunities.
- The importance of growth rates & conversion rates
- Break down and explain each area of the user journey
- Why activated accounts are essential
- And explore some sample data together

[Here's an example of a product-led model to use as inspiration](#). It contains multiple tabs on the bottom and covers both high-level overviews as well as specific drill-down ideas.

It doesn't contain everything, but I find it is the 80/20 for what many of my clients need to be successful.

You can make a copy for yourself to customize as needed.

Finding Areas of Opportunity

Many new leaders look at the growth model and think that every area should be improved. While this might technically be true, you need to be hyper-focused at an early-stage company.

As a leader, you have access to more resources and need to get better at focusing to maximize your impact.

Your goal is to identify a few (2-3) areas that present big growth opportunities for the business. Get laser focused and spend 80% of your time focusing on those.

There are a few steps to identify these opportunities.

1. [Setup tracking for your growth model](#)
2. Analyze each stage (both total numbers and conversion rates)
3. Compare your proprietary data to industry benchmarks

Note: if you've never done this type of analysis, Openview has some great [public PLG benchmarks](#) or you can [watch this video](#), where I walk through a sample model and call out data points I'd expect to see for PLG SaaS businesses.

You're searching for one of those things:

1. Areas of the model where you're underperforming.
2. Areas of the model where you're doing fine, but believe you can accelerate even more.

Those are your opportunities.

After you determine your focus area(s), [brainstorm lots of ideas, then prioritize those with the biggest impact](#).

Many growth marketers and PMs are used to working around resource constraints, which forces you to think more narrowly. Challenge yourself to think big here, and without constraints.

Don't just explore incremental projects and experiments, but think about new programs that might unlock exponential growth. Then prioritize your list based on impact.

Think about how the initiatives you prioritized fit together, and try to summarize them into themes, stories, or frameworks.

This will be used later to help communicate your strategy to the rest of your leadership team, who aren't experts in growth. So take your time.

Goals → Strategies → Tactics

There are many different ways to organize your strategy. I find that simple & actionable is always the most effective.

That's why I loved the GST template from [Dave Gerhardt](#). Dave is a SaaS marketing leader, but the framework applies to cross-functional growth teams as well. It's a really simple and effective way to organize your thoughts and communicate your plans.

Here's the skinny. GST stands for goals, strategies, and tactics. You want to define all three.

Goals: usually company (or growth team specific) revenue goal

List out the specific target for your team.

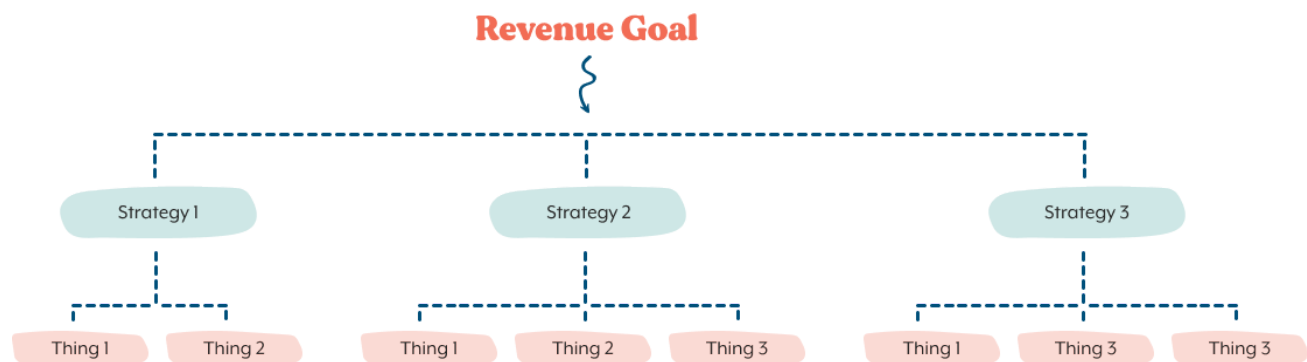
Strategies: how you're going to generate that revenue

List out 2-3 growth levers/strategies that assist in achieving that revenue goal above.

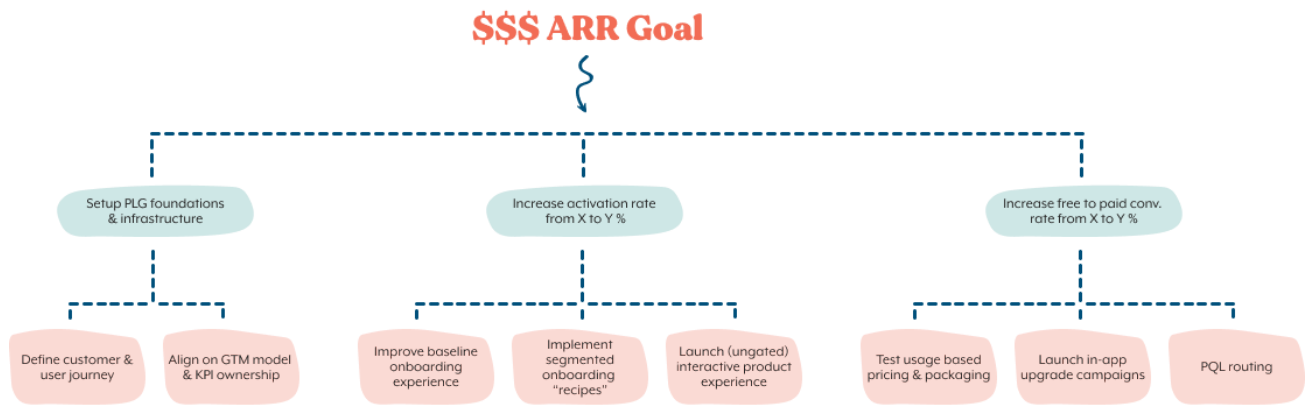
Tactics: how are you going to execute the strategy

3-4 tactics for each growth lever above. Note that tactics can also be programs, frameworks, bets, tests, etc)

It's helpful to create a slide to see how they all work together. Something like this



When filled out, it would look more like this.



Structuring your growth team

Growth VS Marketing vs Product

Drawing clear lines of ownership and accountability is incredibly important for product-led companies to be successful.

Here's how I typically see things defined at product-led companies. This may not be perfect for every company but should be directionally accurate.

Marketing

- Focused on: Evangelizing the category, building the brand, and growing the audience.
- KPIs: Brand, traffic, audience size, leads

Growth

- Focused on: getting the audience to experience product value as quickly as possible, commercialization efforts
- KPIs: New signups (freemium or free trial), activated accounts, PQLs, purchases, self-service revenue

Product

- Focused on: improving & increasing core value
- KPIs: Churn, NPS, feature specific use, qualitative feedback

What I've listed above is a great starting point. But, I typically advise folks to take things one step further and outline a RACI matrix too. It's a great tool to drive alignment.

Just in case you've never done this before, here's the skinny.

A RACI matrix lays out different roles on a team (or in this case across departments) and uses the letters R, A, C, and I to outline ownership and accountability.

RACI Role	Definition
Responsible	Does the work to complete the task
Accountable	Delegates work and is the last one to review the task or deliverable before it's deemed complete
Consulted	Provides input based on how it will impact their project work or their domain of expertise on the deliverable itself
Informed	Needs to be kept in the loop on project progress, rather than roped into details of every deliverable

You'll want to create something like this document below, and fill in with the appropriate letters from the RACI definition above.

	Marketing	Growth	Product	Sales/CS	KPIs
Acquisition					
Website and Positioning					
Login/Signup Page					
Channel Performance					
Referral Program					
Product Virality Loops					
Freemium Tools					
Activation					
In-App Onboarding					
Email Workflows					
I:I Help					
Retention					
Product Engagement					
Email Workflows					
I:I Help					
Revenue					
Pricing and Packaging					
Optimizing Pricing Page					
Checkout Flow					
I:I Help					
Custom Contracts					
Upgrades					
In-App Campaigns/Programs					
I:I Help					

*This is just an example of what you'll want to create for your business. Within each major area of the growth model, you'll want to outline the main streams of work, list the appropriate KPIs, and assign RACI ownership.

How to Structure the Team

Many companies ask how they should structure their growth team. There isn't one "ideal" way to set up the team. The team should generally be set up to support what the business needs.

That includes the following:

Type of businesses:

- B2B
- B2C
- B2B2C
- Product-led
- Sales-led
- Hybrid

Who you sell to:

- SMB
- Enterprise

Growth challenges:

- Acquisition:
- Retention
- Monetization
- Infrastructure: Do you have enough data to know which of those challenges/pirate metrics to focus on?

Company maturity:

Building stage

- Finding PMF
- Scale-up mode (finding channels & loops that's work)

Optimizing phase:

- Improving what's there already there
- Incremental wins

Innovating stage:

- Exploring new channels & loops
- Big bets

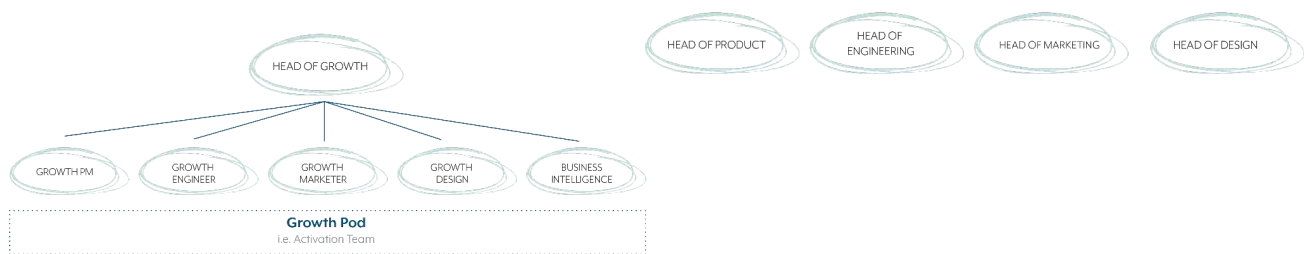
My clients are typically PLG B2B businesses that sell to SMBs. They are in the building/optimizing stages of growth - and typically have acquisition and retention challenges. That means their growth teams are focused on:

- Building effective loops and channels
- Optimizing those loops and channels

Those growth teams *usually* function independently, and look something like this:

Independent Team Structure

Growth operates as a standalone team within the organization



Growth leader:

- Growth product manager (with design + eng support)
- Growth marketer (with part-time design and occasional eng support)
- BI support across both structures

Depending on the company, Product Marketing often works in tandem with both teams to drive product adoption and may sit on the growth team - or just heavily collaborate with the growth team.

Some companies may also have monetization challenges, which often work with the same team structure + additional collaborators as needed.

*Want another perspective? My friend Ben Williams (ex VP Growth @ Snyk) [wrote this great resource](#) on the OV blog.

Leading a growth team

Creating a Growth Operations Manual

Growth teams tend to work differently from other teams. But if you don't clearly outline exactly how the team approaches the work, you'll run into potential problems down the road.

Creating an operating manual is a great way to educate new folks who join your team and serve as a reference for the other teams at your company.

It serves as a central location for important team information, operating principles, collaboration, ownership, etc. It can help to ensure that the team is able to operate effectively and achieve its goals.

Below is what I typically include. Feel free to add/adjust based on your experience, team size, and specific needs.

1. Team structure:

Outline [how the team fits together](#). You'll want to include things like:

- What are the individual roles on the growth team?
- What does each role focus on?
- Who does each role report to?

2. Goals and objectives:

Clearly defined and measurable [goals and objectives](#) for the team.

3. Operating principles

These are specific guidelines for how the team makes decisions and gets the work done. Examples include things like:

- Focused on learning & sharing to enable other areas of the organization
- Providing value to the user as quickly as possible
- Putting the users' opinions over your own

- Using data to make decisions
- Experimentation before deep investment
- Bias for simple solutions that scale

4. Processes:

Outline of the team's standard operating procedures, specifically the process for [ideating](#), [testing](#), and implementing growth initiatives.

5. Growth KPIs

- Define [key growth metrics and KPIs](#)
- Determine where they're tracked
- Outline how often you'll look at the numbers
- Specify who should receive regular reports and updates

6. Collaboration:

This can be where you include a [RACI model](#) that outlines key roles, responsibilities, and points of collaboration for important KPIs (and areas of the user user journey) with other teams, like product, marketing, sales, and CS.

Depending on your team size/complexity, you may also want to include sections for:

- Communication (both internally and with other teams)
- Decision-making
- Meeting cadence
- Retrospective schedule
- Tooling
- etc

Brainstorming and Prioritization

When it comes to generating ideas for solving problems, your tendency will likely be to jump right to the perfect solution first. And if the problem is super obvious, that might work just fine.

But most of the time, you'll probably start with the wrong solution. Or at least, that's what my teams did. We'd come up with an obvious, quick fix to a problem only to be let down by the results. So after lots of failures and time spent guessing, we found that the following process helped us pick the ideas that are likely to have the biggest impact.

First, we'd get crystal clear on the problem we wanted to solve. Then, we get in a room (or virtual room) and brainstorm a bunch of different solutions to the problem.

We'd typically invite 1 person from other departments across the business (like customer happiness, customer success, sales, marketing, and creative) to help get a wide variety of ideas.

Here's a photo of one of our team brainstorms during my time at Wistia.



Next, we'd rank our ideas using the ICE framework, which was pioneered by [Sean Ellis](#) from [Growthhackers](#).

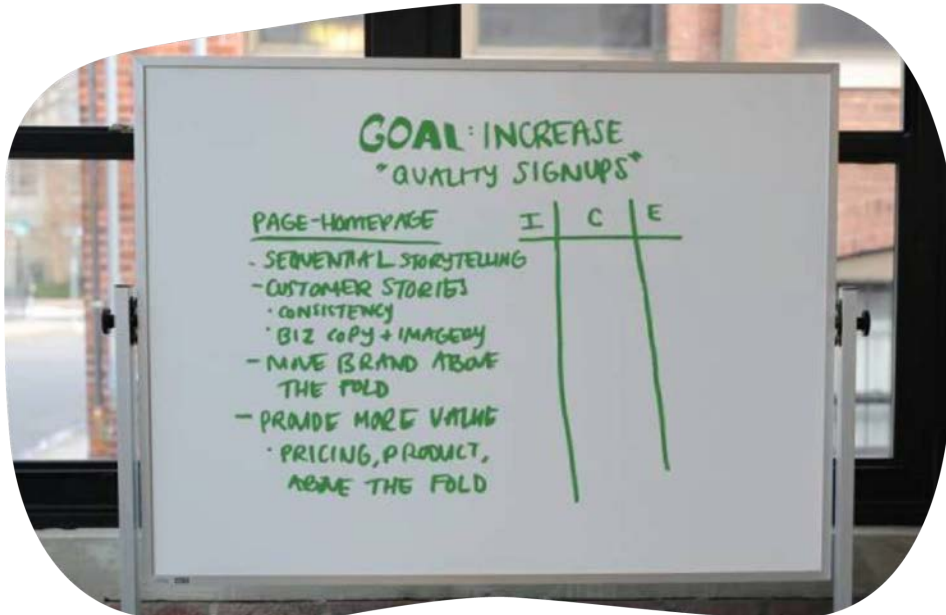
It isn't rocket science, but we've found that it's super helpful to have some way to determine which idea is actually worth your time.

Here's a quick overview of the ICE process.

- The "I" stands for Impact. Does the idea have the potential to have a big impact on your goal? If it's a little change, it will probably have a little impact. Bigger changes tend to produce bigger results.
- The "C" stands for Confidence. Do we think the idea has a high chance of succeeding or is it just a random idea that somebody tossed out? This one is usually the hardest to be honest with, and where the user research and other quantitative information collected in the previous stages is super helpful.
- The "E" stands for Effort. Is this an idea that we can execute in a couple of hours, or is it something that will take weeks or months of design and engineering time?

Together, we rank each of the ICE components on a 1–5 scale. Then, take the average to determine which ideas are the strongest.

*note some folks like to use a RICE prioritization framework instead of ICE. The extra “R” stands for reach. If that works for you - use it! I personally think it’s redundant if you’re evaluating your potential impact correctly.



The result? A prioritized list of ideas that will help us improve conversion rates.

Typically, we do this on a whiteboard at first to keep things fluid, and then later transcribe it over into our [Master Backlog of Ideas document](#).

Here’s a video sharing more context on brainstorming and prioritization from my onboarding course.



Experiment Documentation Template

Below you'll find an experiment doc template that I encourage you to customize and use for every major test and program you run. It'll help organize your thoughts, make sure you're optimizing for the right KPIs, and begin with the end in mind.

*Full disclosure, I didn't create this! [Brian Balfour](#) (who led growth at HubSpot and now is the CEO of [Reforge](#)) shared this open-source version of this experiment template back in 2014, which I've adapted into the version you see below. I'm not sure if he still uses it (I tried to find the original version on the internet to give him the credit but couldn't find it anywhere) but I still do!

Onboarding test 001

Experiment 1 sentence description here...

Hypothesis:

We believe that....

What we'll learn:

If our hypothesis is correct:

- What will we learn?
- Where else can we apply this learning?

If our hypothesis is wrong:

- What will we learn?
- Where else can we apply this learning?

Background information:

Main metric

Define your main success metric here along with other secondary metrics you're interested in tracking.

Secondary metrics to track:

Supporting data:

Include any relevant data here. Include the historical data (both qualitative and quantitative) for anything you think is relevant to your experiment

Test Summary

This experiment will involve...

Control screenshot

Variation screenshot

Experiment Design

Est launch: date

Test page(s): where is the experiment running

Number of variations:

Percentage of users tested:

Weekly traffic: how much traffic does each version of the experiment get?

Minimum sample size: ([use Evan Miller sample size calc](#))

Time to detect uplift: based on that traffic above, your current conversion data, and statistical significance - how long will it take to determine if you're successful or not?

Important milestones: When will we take a look at the data?

What other people/teams need to be informed about this:

Results

Link to the experiment data here:

Learnings

- Did we learn anything surprising from this experiment?

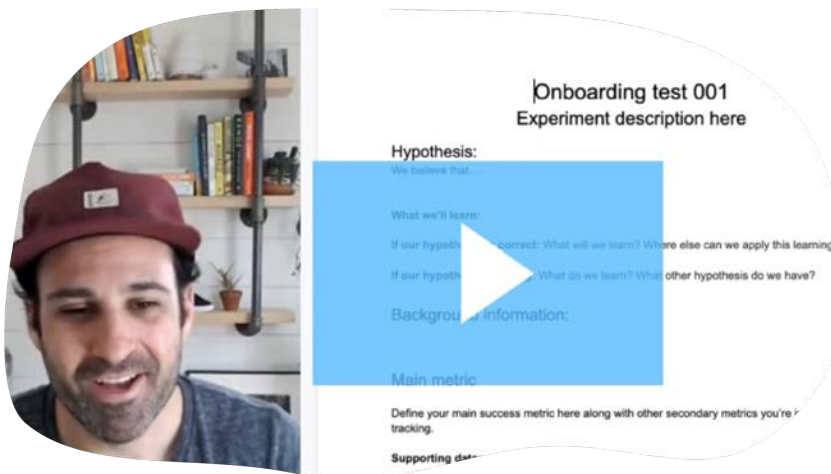
Action Items

If our initial hypothesis is wrong:

- What future experiment should we try?

If our initial hypothesis is right:

- What is the next step to maximize the impact?
- Where else can these learnings be applied?



Here is a short video from my Value First onboarding program where I share more context on how to successfully use this document.

Tracking Experiment Wins/Losses Over Time

In the link below, you'll find the sheet that I use to track my experiments over time. I jokingly refer to this as the "if I get hit by a bus document." Because it contains the summary, approach, and results for all my experiments over time.

*This is another one that Brian Balfour originally open-sourced back in 2015 that I've modified into the version here. I'm not sure if he still uses it (I tried to find the original version on the internet to give him the credit but couldn't find it anywhere) but I still do!"

Sample Brainstorm & Backlog Template



Google Sheets



Balancing qualitative and quantitative insights (video)

Here is a short video from my PLG tracking and reporting program where I share more context on how to balance qualitative and quantitative data.



Tracking and KPIs Starter Template

Not sure what metrics to track? Here's an open source document I share with clients to help them get started. It contains multiple tabs on the bottom and outlines important KPIs and ways of tracking. You'll want to re-create this inside your analytics tools. But, it's a great place to start.

Product-Led Funnel Example



Google Sheets



North Star Metrics

Here is a short video from my tracking and reporting program where I share more context on the importance of north star metrics for PLG businesses - and how to go about defining yours.



Activation vs Time-to-Value?

Activation rate is a key part of the product-led model. That's why growth teams spend so much time focused on it.

But it's really hard to track (and improve) your activation rate without a decent volume of new signups each month; without that, the data is too volatile.

A difference in a few users here or there dramatically changes the story. You'll get false readings.

- When it goes up - you'll think you're killing it and celebrate prematurely.
- When it goes down - you'll blame yourself and think you're not making progress.

Both situations are bad. So what's an early-stage saas business to do?

One solution. Instead of activation rate. Focus on time-to-value.

Rather than get super focused on activated accounts. Track how long it takes new accounts to hit the activation moment.

In my experience, it's a good proxy. It's much less volatile. It's an input for activation rate. And it'll help you measure your progress in an actionable way.

Decrease time to value and you're headed in the right direction to increase your activation rate.

It's a great solution for early-stage orgs.

First 1:1s With a New Team Member

* This is a template for your first one-on-one meeting agenda with a new direct report. I originally got this from an amazing colleague, [Amy Newell](#). She's an incredible leader and manager. I've adapted her version into what you see below.

For our first 1:1 here are my thoughts on agenda items. There's no way we'll cover all these things in our first one-on-one, and you don't necessarily need to prepare, but just so I don't spring surprise questions on you (which I personally find stressful), here you go:

Questions about you:

- Who you are, what matters to you as a whole person, not just an employee
- Your work style, how you work best
- Strengths
- Challenges you face, and how I can best support you in them
- Feedback style/preferences

- Manager peeves for me to avoid
- Career goals, any thoughts about how I can help you with them

Questions about your team (for taking over an existing team with new reports rather than a new hire)

- Your general thoughts on your team (dynamics, etc.)
- Problems/concerns/issues you have or hope I can eventually help address

Stuff about me:

- Who I am, what I care about as a person and as a manager
- My work style, how best to work with me
- Any other questions you have for me

If you have your own list of agenda items that feel more important to cover off the bat than these, of course bring that list to our first meeting and we'll start there.

Weekly 1:1 Template

I find that many people waste the 1:1's they have with their manager. Many spend their time discussing projects and status - which is a huge miss.

Here's the framework I recommend using. This is great for your reports and with your manager.

This has 8 questions total and should take no more than 10 mins of time to complete. I recommend sending to managers at least 16 hours before the 1:1 so they have time to review beforehand and can come prepared too.

How I'm feeling this week:

- 1-5 (5 being the best):
- Why I'm feeling this way:
- Here's what I'm prioritizing right now:
- Here's what I'm de-prioritizing right now:
- Here's what I'm blocked on:
- Here's what I need your help with:
- Here's a few longer-term items that are on my mind. We won't discuss these today, I just want you to know they're on my mind and we'll discuss them in a future meeting:
- Here's what I want to discuss together:

Programs to Upskill Your Team

Want to upskill your growth team? There's a lot of great content available. But here are the resources I recommend to leaders and teams.

[Reforge](#) - the industry leader in growth & tech education online. They have several different paid programs taught by impressive faculty - and plenty of free educational content too.

[ProductLed](#) - the place to learn about product-led growth. They offer cohort-based programs teaching you all about PLG, pair you with mentors to help apply the concepts to your business, and have tons of educational content.

[GrowthMentor](#) - an online marketplace where you can gain information & mentorship from industry experts. They have a wide variety of backgrounds on their platform and make it quick/easy to book time.

Coach/advisor - work with someone who's led growth teams in the past, that's familiar with your challenges and can work with your team to help assess your gaps & fill them.

These resources will save you years of mistakes on your own.

Team habits and rituals:

Communication and Sharing

Want to thrive as head of growth? It's not just about being technical and analytical. You need to be exceptional communicators too.

Because a lot of the most important growth work is invisible. So it's your responsibility to keep everyone informed, aligned, and excited.

But over-communicating doesn't come naturally to most. It sounds easy - but is really hard in practice.

I encourage anyone who's leading a growth team to be sharing something at least once a week with their company. It can be in Slack, during All Hands, Show and Tell, or whatever opportunities exist at your company.

Not sure what to share? Below are 5 things to start sharing today to immediately drive more alignment.

1. Your current Focus areas: you want to avoid people asking "what's growth working on these days?" at all costs.

- What you're focused on right now - and why
 - Work that you've deprioritized - and your reasoning for that
2. Recent results: what's happened with the work you've shipped recently?
- Experiment wins - and how other teams can capitalize
 - Experiment losses - so everyone can avoid the same mistakes
 - Recent quick-wins - and why you prioritized them
3. New insights and learnings from those results
- Results of user interviews
 - Interesting user research nuggets
 - Screen recordings of really successful users
 - Recordings of users who got stuck along the way - and your ideas why
 - What you're learning about customers - and how can other teams can leverage
4. Opportunities and ideas: things you're excited to explore that might lead to future impactful work.
- High-leverage segments you've identified
 - Interesting cohorts of data everyone can learn from
 - Big hypothesis you want to test - and your next steps
5. Your operating system: it's important to remember most people still haven't worked with a growth team before
- Where to draw the lines between growth and other depts
 - What KPIs you're focused on right now - and why
 - How you think about success
 - How you get the work done

A head of growth needs to think of their role as a chief enablement officer. Sharing has to be part of your weekly operating system.

FullStory Fridays

When I led the growth team at Wistia, we spent tons of time on the new user onboarding flow.

We ran dozens of experiments inside the product to improve our activation rate. But we always felt it could be better. After a while, we weren't sure how.

Then, we started a team ritual that changed everything...

FullStory Fridays.

Every Friday we would order lunch, hop in a conference room, and watch 20 real people use the product for the first time.

It was painful.

- Our users got lost in the product
- They got stuck
- They rage-clicked on unclickable elements
- Found painful bugs we hadn't seen
- Some left right before they got to the “aha” moment.
- One time we saw someone get three popups at the same time.

The practice was a game-changer for our team. These sessions refocused us on solving the right problems for our users.

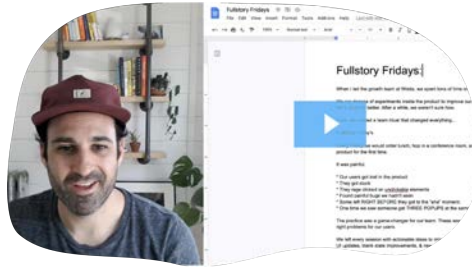
We left every session with actionable ideas to improve the experience; bug fixes, copy changes, UI updates, blank state improvements, & new experiment ideas.

Not sure how to take your onboarding to the next level? Try watching users interact with your product for the first time. You'll get some incredible insights.

We used FullStory, but there are plenty of other tools to do this. It's about getting closer to the users and seeing how they interact with your product.

That's where the magic happens.

Below is a short video from my Value First onboarding program where I share more context.



End-to-End Customer Review

If you work in a product-led SaaS company, twice a year, you should do an end-to-end review of the user experience.

Here's the gist:

Print out screenshots of your entire user experience, from website visitor to paying customer.

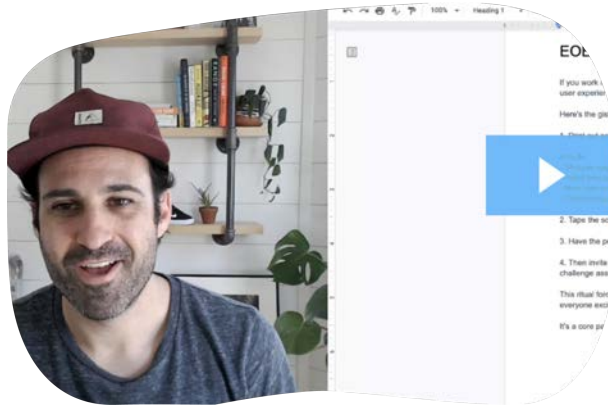
1. Include
 - a. Shopper pages on your site
 - b. Signup process
 - c. New user onboarding flow
 - d. Checkout/purchase flow
 - e. How users upgrade their plan
2. Tape the screenshots on a wall (or virtual wall) in sequential order.
3. Have the person accountable add a sticky note that explains how each step is performing and why.
4. Then invite a cross-functional team to review the experience together.

Let them ask questions, challenge assumptions, spot areas that are misaligned, and suggest ideas to test.

This ritual forces everyone to communicate. It aligns teams around the user experience. It keeps everyone excited about getting better. And, it's a ton of fun.

It's a core part of an effective growth operating system. I can't recommend it enough.

Below is a short video from my Value First onboarding program where I share more context.



Go Through the User Experience

Want to improve your product-led saas product? Here's a fun exercise: become a customer.

Open an incognito browser. Sign up for your product. Go through the onboarding flow. Then, pull out a real credit card - and buy a paid plan.

Take notes along the way. I promise, you'll be shocked at the stuff you see.

Below is a short video from my Value First onboarding program where I share more context.



Team Retrospectives

One of my favorite growth team rituals is the quarterly retro. It creates a healthy space for everyone to communicate. Focuses team energy on solving the right problems. It keeps everyone aligned. And excited about getting better.

Here's the gist.

1. Discuss what's going well and give kudos to each other.
2. Discuss what could be going better and explore ways to improve.
3. Review previous quarter goals & results.
4. Assess upcoming KPIs and targets.

It's low effort to run. High impact on team morale and productivity.

Can't recommend it enough.

More retro resources:

[How to run a remote retro & have fun doing it](#)

[How to run an agile retro](#)

[How to run a productive retro](#)

Below is a short video from my Value First onboarding program where I share more context.



Common Landmines

Why These Roles Turn Over So Often

The average head of growth gets a new job every 12-16 mos. Some get frustrated and leave on their own. Some are fired.

But it's not a lack of growth experience that causes them to fail. Most have plenty of specialized growth skills & knowledge.

It's the lack of experience leading the growth capability.

Here's what I mean:

- They know how to experiment

- They know which KPIs to report on

- They know how a growth team should operate

- They know how to analyze data to find opportunities

- They know effective growth frameworks and strategies

But they don't know how to thrive leading a growth team

They lack experience:

- Driving cross-functional alignment

- Balancing quick-wins with longer-term bets

- Communicating strategy with other leadership members

- Drawing lines between growth, marketing, and product teams

- Advocating and acquiring the resources they need to be successful

In my experience, that's where most struggle. And why the roles turn over so often.

Either the head of growth gets frustrated by these things. Or, the company gets frustrated with them.

Leading a growth team can be a tough and sometimes lonely business.

Driving Alignment Across The Company

As a head of growth, you must drive alignment across the company. Everyone needs to understand what growth is, what you're working on, and why.

It's one of the most important jobs - and biggest potential landmines. Especially at a fast-paced startup.

Most people haven't worked with a growth team before. So they probably have different ideas and expectations about your role, which leads to misalignment.

Here's the playbook I typically share with coaching clients to address this 🙌

First, create your growth operating system and share it with your leadership team. Ask them to review, ask questions, and poke holes in your approach. Go slow here and work through any issues.

Then, once you have buy-in with them — "launch" it with a presentation to your company. Treat it like a new feature release.

Moving forward, every time you [present or share a project](#), tie it back to a piece of your operating system & strategy. In practice, it might sound like this:

"Hey everyone - in Q2, the growth team is focused on improving our new user activation rate. And as part of our operating system, we like to experiment before investing deeply. So today, I'm excited to share one of our latest experiments. Here it is..."

Clarity and repetition are your most important tools. Use every single project as an opportunity to stay aligned.

Creating A Culture Of Experimentation

A culture of experimentation is crucial for the success of any growth team. But it's not always a given that your company will be open to experimenting.

Many founders/leaders hire someone to "question the way we've always done it," only to push back when the rubber meets the road.

As a head of growth, there are a few key steps you can take to create a culture of experimentation within your organization:

1. **Communicate the importance of experimentation:** Make it clear to your company that experimentation is a key part of the growth process and it's encouraged and valued within the organization.
2. **Encourage risk-taking:** Encourage your team to take risks and try new things, even if there is a chance of failure. Emphasize that failure is a natural part of the experimentation process and can often lead to valuable learning opportunities.
3. **Provide resources and support:** Provide your team with the resources and support they need to conduct experiments, including time, budget, tools, [templates for experiments](#), and [tracking](#).
4. **Celebrate successes and failures:** Make sure to celebrate both successes and failures as a team. This can help to create a positive culture of experimentation where team members feel comfortable trying new things and learning from their experiences.
5. **Foster a learning culture:** Encourage your team to continuously learn and grow, and provide opportunities for them to do so. This can help to create a culture of experimentation where team members are always looking for new ways to improve and innovate.
6. **Be the guinea pig:** Nothing helps more than when a leader sets the example of the behavior they want to see from their teammates. Share your failures publicly and celebrate the opportunity to learn.

By taking these steps, you can create a culture of experimentation within your organization that fosters innovation and continuous learning, and helps to drive growth.

Dealing With Micromanagement

You'll probably feel like you're micromanaged at times. Even if you have a ton of experience. And especially at an early-stage company.

It's one of the reasons a head of growth leaves a new company under 12 mos.

But, recognize it's not on purpose. Most managers/ founders/ CEOs don't mean to micromanage you. Most don't even know they're doing it.

They just care a TON about the business - and they want to help. Sometimes, that comes out in unhelpful ways.

Plus, because growth is such a new field, most managers don't know what you need their help on. So they may randomly check on things, thinking they're being helpful.

The challenge is when managers provide too much structure & input to a problem a head of growth already has a lot of experience with. That's micromanaging.

You can avoid it by proactively letting your CEO what you'll need from them on major initiatives.

I recommend using task-relevant maturity (TRM) as a framework to manage up.

TRM comes from Andy Grove in the book [High Output Management](#). It's one of the classics recommended to new managers.

TRM is traditionally used as a framework for managers to help their teams. But it's also a sneaky effective tool for managing up too.

Adjust your management style to their Task Relevant Maturity (TRM):

TRM of Subordinate:	Effective Management Style:
Low	Structured; task-oriented; tell What, When, and How
Medium	Individual-oriented; emphasis on two-way communication, support, mutual reasoning
High	Involvement by manager minimal: establishing objectives and monitoring

Here's the skinny.

When you have a lot of experience at something (high maturity) - let your CEO know that you'll reach out for help establishing objectives - and when you get stuck.

When you're working on a new problem (low maturity) - let them know that you'd love more of their help and input.

Your CEO still wants to help. This framework lets them know which initiatives you'd like their help on - and how to ask for the help you need.

You can even bake this into your 1:1 and other docs - so it's part of your weekly operating system.

The result?

- ✓ Help solving the right problems.
- ✓ Better working relationship.
- ✓ Less micro-management.
- ✓ More alignment.

Prioritization

As your career progresses, the most important skill is prioritization. The ability to evaluate what needs your attention right now. And what can wait.

Especially if you work at a startup where you hear amazing ideas every single day. There isn't enough time in the day to execute everything.

Working harder or longer isn't the answer. Doing everything is a distraction from the most impactful work.

Prioritization is key 🗝️

If you're looking for a system to get started - I am a huge fan of the ICE framework made popular by [Sean Ellis](#) many years ago. It's dead simple and extremely helpful.

Each idea gets evaluated by the framework below.

I = potential impact. Is the initiative likely to generate a big impact vs a neat idea that might not move the needle much?

C = your confidence the idea will work. Do you have some background information that makes you believe the initiative will be successful or is this a guess?

E = ease of implementation. Is this a small initiative you can execute quickly or a big project that requires more resources?

I keep a backlog of growth ideas in GSheets (and encourage clients to do the same) and rank them on a 1–5 scale for ICE. Once a month, I revisit the rankings and re-prioritize my roadmap.

Making Decisions With Incomplete Data

In SaaS, data is a valuable currency. Especially for product-led businesses. And everyone feels like they don't "have enough" data.

They want more insights into more channels. More segments. More cohorts. More drill-down views. More product analytics. More ways they can slice and dice the numbers.

Every growth team feels the same way. It's a constant challenge.

I had the opportunity to provide some onboarding guidance to a Google App. The first thing the Product Manager said was, "Hey, just a heads-up we don't have great product analytics & tracking infrastructure in place yet."

If Google doesn't have enough data. How could the average early-stage SaaS business?

So over time, my data guidance has shifted.

From, "what data do you need to make a great decision?" to "what's the best decision you can make with the information available?"

As a leader, you need to move fast and make decisions. It's usually better to make the best decision with the information available than wait too long trying to find the perfect answer.

This is especially challenging in growth roles. Where much of your job is to use data to identify opportunities, problem-solve, and track your impact.

When quantitative data is sparse, I usually recommend leaning on qualitative data to round out your perspective.

There are many ways you can do this. IE customer interviews, user testing, user experience mapping, engaging in the product experience yourself, etc.

Use all the data available. Just remember there is no perfect answer.

Tips For Imposter Syndrome

I've coached more than 30 different people leading SaaS growth teams. Before every session, I ask for updates so I can prep for our call:

What's gone well?

What's been challenging?

How are you feeling?

What did you learn?

What's your main focus right now?

Any new blockers or obstacles?

Those types of things

And the most common answer (regardless of seniority, level of experience, or company type) is some flavor of:

I'm lacking confidence

I'm feeling like an imposter

I'm completely lost right now

I'm worried everyone's about to figure me out

And as a 2x head of growth, I used to feel the same way. Leading a growth team is a hard job. That's why I started my coaching/mentorship business in the first place.

The inner dialogue usually sounds like this:

You: I'm not that good at this. Everyone finally figured me out.

Your subconscious: yeah dude, the jig is up.

Also you: I do have SOME cool experience though.

Your subconscious: sshhh.

A few years ago, I started keeping a "trophy" file in Evernote.

Every time I get positive feedback, unexpected praise, or have a project that goes well—I add a trophy to my file.

Then, when things aren't going so hot and I'm feeling a little shaky about myself and my work, I go back to that file and re-read all those nice emails and notes. It's such an amazing reminder of what I have accomplished. It helps me quiet my inner voice.

Remember that you already know way more than you probably realize... and you're smart enough to figure out the rest.

Creating Your 90-Day Plan

No matter how successful you've been in the past or how much experience you have—the first ninety days are critical for anyone switching jobs. This is especially true in a growth role at a startup or early-stage company.

As the first growth hire, your company is hiring you as the expert. The scope and responsibilities for the role usually aren't well defined. Your job is to teach them what should be done and how to do it.

The opportunity to own the strategic direction and have a huge impact is exciting. However, without a plan, and other "growth people" to bounce ideas off, the lack of clarity can be intimidating and lead to imposter syndrome.

There's so much to do during those first 90 days. You've got to:

- Learn about the business.
- Establish relationships with your manager and co-workers.
- Educate everyone about growth and your process.
- Learn how work gets done at this new company.
- Figure out what resources are available.
- Set up a reporting infrastructure.
- Start identifying opportunities.
- Begin working.
- Prove that you know what you're doing.
- Impress your new team.
- Not step on anyone's toes.

Overwhelming, right?

Most people show up without a plan 🧑

Earlier in your career, it's totally acceptable to show up and follow the onboarding plan your new manager put together for you.

But you've been hired into a leadership role at a startup. At this level, you're the expert and you're in charge of how you spend your time. Don't waste it.

You can wait until you start, get the lay of the land, and figure it out as you go. Maybe your new company will have a general onboarding plan you can follow.

Or, you can spend a week before you start, get your shit together, and show up on day 1 with a detailed 90-day plan that's specifically for your role, and designed to help you ramp up quickly.

Your new manager and leadership team will be more impressed by the latter.

Coming in with a plan allows you to build momentum quickly while you manage up and build trust, which is incredibly important for every position, especially so in a cross-functional leadership role.

But most people don't; they figure it out as they go. They spend the first few days feeling lost, poking around new tools, and trying to look busy.

[Here's the exact 90 day plan I created when I started as head of growth](#)