

Sample Approach for Aligned Headcount Planning



1) Start with the sales plan (this is the most scientific piece of the puzzle).

How much do you need to sell?

How many reps does that mean you need?

2) Align the go-to-market team (what you need to support your sales goals).

How many sales development reps do you need to support the new sales team?

How many marketing team members do you need to support the new sales team?

How many customer success managers do you need to support the customer growth based on sales goals?

How many professional services team members do you need to support the customer growth based on sales goals?

How many customer support reps do you need to support the customer growth based on sales goals?

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headcount planning
guide for more advice
on what it takes.**

3) Move to the R&D team (this is more of an art since it doesn't tie directly to sales).

How many engineers do you need to meet your roadmap goals?

How many UX team members do you need to support those engineers?

4) Round out your plan with G&A roles (what you need to support the growing business).

How many HR team members do you need to support this org size?

How many recruiters do you need to hit your headcount goals?

How many finance team members do you need to manage this org size and scale the company based on these goals?

*Be sure to consider possible promotions and span of control against these growth plans.