WANT TO GROW? Have more of the right customer conversations.

GROWTH = Right Prospects x Quantity of Convos x Quality of Convos

…However, as we all know, it's easy to get this wrong.

GROWTH = Right Prospects x Quantity of Convos x Quality of Convos

Right Prospects

- "Spray and pray"
- Unspecific or abstract ICPs
- Ignoring your own customer data
- "Everything to everyone"

Quantity of Convos

- Reps who prospect, close deals, and handle renewals + upsells
- Unclear activity and meeting targets
- "Random acts of marketing" that don't create leads

Quality of Convos

- No consistent sales process or methodology
- Little training, coaching, or development
- Tribal knowledge vs. a documented sales playbook

…PLUS…

- Messy, "low believability" CRM data
- Poor forecasting and pipeline management
- Lack of a predictable revenue-generating process
- Slow improvement of the sales process

HOW TO WORK ON GROWTH – A starting point for our Ops team

GROWTH = Right Prospects x Quantity of Convos x Quality of Convos

1 Nail A Niche

- ❑ Build an Ideal Customer Profile (using <u>your</u> data)
- ❑ Position the Product

2 Know Your Funnel

- ❑ Check your funnel assumptions
- ❑ Specialize the team

3 Inspect + Correct

- ❑ Clarify the sales process + build a playbook
- ❑ Train, Enable, and Coach the Team

4 "Making it Stick" = Metrics + Meetings

METRICS

- ❑ "The Big 5" –Health of funnel
- ❑ A.M.P. – Performance vs. Goals
- ❑ "Clean Your Room" – CRM Hygiene

MEETINGS

- ❑ Quarterly Sales Review
- ❑ Monthly Performance Dialogue w/ PG
- ❑ Weekly Pipe Reviews, Forecasting meetings, + 1:1s

THE GROWTH CHECKLIST FOR SALES– What Good Looks Like

(green)	*We're doing it + it's working*
(yellow)	*(Somewhere in between)*
(red)	*Not doing it or not doing it well*

Growth Principles	The Checklist	You're doing this right if you…
RIGHT PROSPECTS *"NAIL A NICHE"*	❑ An **ideal customer profile** (built using your existing customer data)	• *…have built an ICP by examining your data and selecting the customers that buy the fastest, most lucratively and happiest* • *…have a list of "red flag" factors that salespeople use during discovery to disqualify bad-fit customers*
	❑ **Helpful buyer personas** that describe who's involved, what they care about, and how we help	• *…have a written-down, clear inventory of the people involved in the buying process, what their "day in the life" is like, their pain points, and how we solve them*
	❑ **Discipline and focus** on pursuing deals with customers who match our ICP	• *…have a "sanity-check" built into your territory-building and sales process to ensure reps are targeting our ICP*
QUANTITY OF CONVERSATIONS *"KNOW YOUR FUNNEL"*	❑ An **inverse demand funnel**, with clear assumptions for leads, deals, and revenue by source (marketing, sales, CS, and partners)	• *…understand the leads (by source), opportunities, and conversion rates you need to hit your ARR goals for the quarter and year*
	❑ A specialized sales team, with **each role responsible for "one thing"**	• *…have BDRs prospecting, AEs closing deals (and NOT prospecting), Acct Mgmt handling renewals + upsells, and Marketing running inbound and outbound campaigns (no random acts of marketing)*
QUALITY OF CONVERSATIONS *"INSPECT AND CORRECT"*	❑ A defined **sales process + playbook**, with clear stages, process, and guidelines for "how we sell"	• *…have written down and shared a sales playbook with stages, process, and messaging that the team actually uses*
	❑ **Training and certification** for the sales team	• *…train and continually certify the sales team on your sales process and techniques*
	❑ A **sales manager who "inspects and corrects"** meetings, demos, process, and pipeline	• *…Regularly review and give feedback on sales calls, meetings, demos, notes, and next steps*
	❑ Clear and consistent **"menu" of offerings**, how we price them, and if/how we discount	• *…have this written down and the sales team knows where to find it*
MEETINGS & METRICS *"MAKE IT STICK"*	❑ **One CRM, w/ simple fields,** that people actually use	• *…have one instance of a CRM with usable data (minimal manipulation)* • *…limit fields to capture actionable intelligence and monitor usage*
	❑ **Quarterly Sales Strategy Review** + **Monthly Sales Performance Review** w/ ParkerGale	• *…use these as opportunities to share performance, progress, and point out the parts of the sales process that are "red"*
	❑ Weekly **pipeline reviews** and **1:1s** within the team	• *… the sales leader meets with each rep 1x/week to review deal, clear roadblocks, and give feedback*
	❑ Monthly sales reporting that focuses on **"The Big 5"** pipeline metrics	• *…share the "Big 5" metrics each month and we can believe the data*
	❑ A high-conviction **sales forecasting process**	• *…can share a high-conviction sales forecast with minimal manipulation of the data post-CRM*
	❑ Frequent reporting on **activity, pipe, and CRM**	• *…set targets and report progress vs. activity, meetings, and pipe* • *…create a "Clean Your Room" report that focuses on CRM hygiene*

THE GROWTH CHECKLIST FOR SALES– How PG Can Help

We're doing it + it's working
(Somewhere in between)
Not doing it or not doing it well

Growth Principles	The Checklist	How we help our Sales teams
RIGHT PROSPECTS *"NAIL A NICHE"*	❑ An **ideal customer profile** (built using your existing customer data) ❑ **Helpful buyer personas** that describe who's involved, what they care about, and how we help ❑ **Discipline and focus** on pursuing deals with customers who match our ICP	• ***Analyze customer data and hold an ICP workshop*** *to nail down our best-fit customers, their personas, and how we position our products* • ***Analyze recent pipeline + won deals*** *before the Quarterly Sales review to audit % of deals that fall within our ideal Customer Profile*
QUANTITY OF CONVERSATIONS *"KNOW YOUR FUNNEL"*	❑ An **inverse demand funnel**, with clear assumptions for leads, deals, and revenue by source (marketing, sales, CS, and partners) ❑ A specialized sales team, with **each role responsible for "one thing"**	• ***Assist with building a view of our demand funnel*** *that focuses on leads, conversions, and deals needed to achieve ARR (and which sources all of it comes from)* • ***Planning for team restructurings*** *to specialize roles* • ***Assisting with the hiring process*** *for CRO + VP roles*

QUALITY OF CONVERSATIONS
 	
"INSPECT AND CORRECT"
	❑ A defined **sales process + playbook**, with clear stages, process, and guidelines for "how we sell"
	❑ **Training and certification** for the sales team
	❑ **A sales manager who "inspects and corrects"** meetings, demos, process, and pipeline
	❑ Clear and consistent **"menu" of offerings**, how we price them, and if/how we discount
		• *Partner with ClozeLoop to build out a* ***sales playbook*** *which summarizes:*
		  • *Our sales stages, their definitions, and process*
		  • *Key messaging and meeting resources*
		  • *Guidelines on products and discounting*
		• *Partner with ClozeLoop to build out* ***sales certifications***

MEETINGS & METRICS *"MAKE IT STICK"*	❑ **One CRM, w/ simple fields,** that people actually use ❑ **Quarterly Sales Strategy Review + Monthly Sales Performance Review** w/ ParkerGale ❑ Weekly **pipeline reviews** and **1:1s** within the team ❑ Monthly sales reporting that focuses on **"The Big 5"** pipeline metrics ❑ A high-conviction **sales forecasting process** ❑ Frequent reporting on **activity, pipe, and CRM**	• *Assist with planning and holding* ***Quarterly Sales Reviews*** • *Assist with* ***reporting standup*** *for Monthly Sales Performance Reviews* • *Provide playbooks on standing up an "A.M.P." rep-level report and "Clean Your Room" CRM hygiene report*

THE GROWTH CHECKLIST FOR SALES– What You Might See

- We're doing it + it's working
- (Somewhere in between)
- Not doing it or not doing it well

Growth Principles	The Checklist	If this is a problem, you might hear…
RIGHT PROSPECTS *"NAIL A NICHE"*	❑ An **ideal customer profile** (built using your existing customer data) ❑ **Helpful buyer personas** that describe who's involved, what they care about, and how we help ❑ **Discipline and focus** on pursuing deals with customers who match our ICP	• *"Our win rates just aren't what they should be."* • *"Our target customer is industrial firms" [Too broad]* • *"I feel like our salespeople could be more focused."*
QUANTITY OF CONVERSATIONS *"KNOW YOUR FUNNEL"*	❑ An **inverse demand funnel**, with clear assumptions for leads, deals, and revenue by source (marketing, sales, CS, and partners) ❑ A specialized sales team, with **each role responsible for "one thing"**	• *"We need more focus on activity."* • *"We're not getting the leads we need from marketing."* • *"Our reps don't like to prospect."* • *"Our BDR team does a lot for us, prospecting, handling inbound leads, and a bit of sales ops."*
QUALITY OF CONVERSATIONS *"INSPECT AND CORRECT"*	❑ A defined **sales process + playbook**, with clear stages, process, and guidelines for "how we sell" ❑ **Training and certification** for the sales team ❑ A **sales manager who "inspects and corrects"** meetings, demos, process, and pipeline ❑ Clear and consistent **"menu" of offerings**, how we price them, and if/how we discount	• *"Our reps need help knowing where to focus their time."* • *"Our forecasting could definitely improve."* • *"We need more consistency in how we talk to customers."*
MEETINGS & METRICS *"MAKE IT STICK"*	❑ **One CRM, w/ simple fields,** that people actually use ❑ **Quarterly Sales Strategy Review** + **Monthly Sales Performance Review** w/ ParkerGale ❑ Weekly **pipeline reviews** and **1:1s** within the team ❑ Monthly sales reporting that focuses on **"The Big 5"** pipeline metrics ❑ A high-conviction **sales forecasting process** ❑ Frequent reporting on **activity, pipe, and CRM**	• *"Our sales process could be better, but it's tough to know what to improve first."* • *"I wish I had more time to coach our reps."* • *"Our CRM data needs to be cleaned up before we can use it for reporting."* • *"Our CRM adherence isn't so great."*