

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

$$\text{GROWTH} = \text{Right Prospects} \times \text{Quantity of Convos} \times \text{Quality of Convos}$$



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

GROWTH = ~~Right Prospects~~ x ~~Quantity of Convo~~s x ~~Quality of Convo~~s

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

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

- 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 your data)
- Position the Product

2 Know Your Funnel

- Check your funnel assumptions
- Specialize the team

3 Inspect + Correct

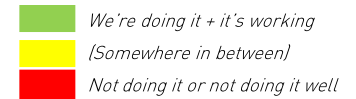
- Clarify the sales process + build a playbook
- Train, Enable, and Coach the Team

4 “Making it Stick” = Metrics + Meetings

METRICS	<ul style="list-style-type: none"> <input type="checkbox"/> “The Big 5” –Health of funnel <input type="checkbox"/> A.M.P. – Performance vs. Goals <input type="checkbox"/> “Clean Your Room” – CRM Hygiene 	MEETINGS	<ul style="list-style-type: none"> <input type="checkbox"/> Quarterly Sales Review <input type="checkbox"/> Monthly Performance Dialogue w/ PG <input type="checkbox"/> Weekly Pipe Reviews, Forecasting meetings, + 1:1s
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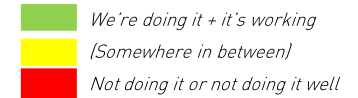


THE GROWTH CHECKLIST FOR SALES– What Good Looks Like



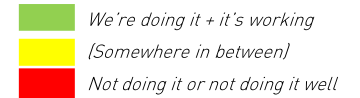
Growth Principles	The Checklist	You're doing this right if you...
RIGHT PROSPECTS <i>"NAIL A NICHE"</i>	<input type="checkbox"/> An ideal customer profile (built using your existing customer data)	<ul style="list-style-type: none"> ...have built an ICP by examining your data and selecting the customers 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
	<input type="checkbox"/> Helpful buyer personas that describe who's involved, what they care about, and how we help	<ul style="list-style-type: none"> ...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
	<input type="checkbox"/> Discipline and focus on pursuing deals with customers who match our ICP	<ul style="list-style-type: none"> ...have a "sanity-check" built into your territory-building and sales process to ensure reps are targeting our ICP
QUANTITY OF CONVERSATIONS <i>"KNOW YOUR FUNNEL"</i>	<input type="checkbox"/> An inverse demand funnel, with clear assumptions for leads, deals, and revenue by source (marketing, sales, CS, and partners)	<ul style="list-style-type: none"> ...understand the leads (by source), opportunities, and conversion rates you need to hit your ARR goals for the quarter and year
	<input type="checkbox"/> A specialized sales team, with each role responsible for "one thing"	<ul style="list-style-type: none"> ...have BDRs prospecting, AEs closing deals (and NOT prospecting), Acct Mgmt handling renewals + upsells, and Marketing running inbound and outbound <u>campaigns</u> (no random acts of marketing)
QUALITY OF CONVERSATIONS <i>"INSPECT AND CORRECT"</i>	<input type="checkbox"/> A defined sales process + playbook, with clear stages, process, and guidelines for "how we sell"	<ul style="list-style-type: none"> ...have written down and shared a sales playbook with stages, process, and messaging that the team actually uses
	<input type="checkbox"/> Training and certification for the sales team	<ul style="list-style-type: none"> ...train and continually certify the sales team on your sales process and techniques
	<input type="checkbox"/> A sales manager who "inspects and corrects" meetings, demos, process, and pipeline	<ul style="list-style-type: none"> ...Regularly review and give feedback on sales calls, meetings, demos, notes, and next steps
	<input type="checkbox"/> Clear and consistent "menu" of offerings, how we price them, and if/how we discount	<ul style="list-style-type: none"> ...have this written down and the sales team knows where to find it
MEETINGS & METRICS <i>"MAKE IT STICK"</i>	<input type="checkbox"/> One CRM, w/ simple fields, that people actually use	<ul style="list-style-type: none"> ...have one instance of a CRM with usable data (minimal manipulation) ...limit fields to capture actionable intelligence and monitor usage
	<input type="checkbox"/> Quarterly Sales Strategy Review + Monthly Sales Performance Review w/ ParkerGale	<ul style="list-style-type: none"> ...use these as opportunities to share performance, progress, and point out the parts of the sales process that are "red"
	<input type="checkbox"/> Weekly pipeline reviews and 1:1s within the team	<ul style="list-style-type: none"> ... the sales leader meets with each rep 1x/week to review deal, clear roadblocks, and give feedback
	<input type="checkbox"/> Monthly sales reporting that focuses on "The Big 5" pipeline metrics	<ul style="list-style-type: none"> ...share the "Big 5" metrics each month and we can believe the data
	<input type="checkbox"/> A high-conviction sales forecasting process	<ul style="list-style-type: none"> ...can share a high-conviction sales forecast with minimal manipulation of the data post-CRM
	<input type="checkbox"/> Frequent reporting on activity, pipe, and CRM	<ul style="list-style-type: none"> ...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



Growth Principles	The Checklist	How we help our Sales teams
RIGHT PROSPECTS <i>"NAIL A NICHE"</i>	<input type="checkbox"/> An ideal customer profile (built using your existing customer data) <input type="checkbox"/> Helpful buyer personas that describe who's involved, what they care about, and how we help <input type="checkbox"/> Discipline and focus on pursuing deals with customers who match our ICP	<ul style="list-style-type: none"> 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 <i>"KNOW YOUR FUNNEL"</i>	<input type="checkbox"/> An inverse demand funnel, with clear assumptions for leads, deals, and revenue by source (marketing, sales, CS, and partners) <input type="checkbox"/> A specialized sales team, with each role responsible for "one thing"	<ul style="list-style-type: none"> 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 <i>"INSPECT AND CORRECT"</i>	<input type="checkbox"/> A defined sales process + playbook, with clear stages, process, and guidelines for "how we sell" <input type="checkbox"/> Training and certification for the sales team <input type="checkbox"/> A sales manager who "inspects and corrects" meetings, demos, process, and pipeline <input type="checkbox"/> Clear and consistent "menu" of offerings, how we price them, and if/how we discount	<ul style="list-style-type: none"> Partner with ClozeLoop to build out a sales playbook which summarizes: <ul style="list-style-type: none"> 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 <i>"MAKE IT STICK"</i>	<input type="checkbox"/> One CRM, w/ simple fields, that people actually use <input type="checkbox"/> Quarterly Sales Strategy Review + Monthly Sales Performance Review w/ ParkerGale <input type="checkbox"/> Weekly pipeline reviews and 1:1s within the team <input type="checkbox"/> Monthly sales reporting that focuses on "The Big 5" pipeline metrics <input type="checkbox"/> A high-conviction sales forecasting process <input type="checkbox"/> Frequent reporting on activity, pipe, and CRM	<ul style="list-style-type: none"> 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



Growth Principles	The Checklist	If this is a problem, you might hear...
RIGHT PROSPECTS <i>"NAIL A NICHE"</i>	<input type="checkbox"/> An ideal customer profile (built using your existing customer data) <input type="checkbox"/> Helpful buyer personas that describe who's involved, what they care about, and how we help <input type="checkbox"/> Discipline and focus on pursuing deals with customers who match our ICP	<ul style="list-style-type: none"> • <i>"Our win rates just aren't what they should be."</i> • <i>"Our target customer is industrial firms" [Too broad]</i> • <i>"I feel like our salespeople could be more focused."</i>
QUANTITY OF CONVERSATIONS <i>"KNOW YOUR FUNNEL"</i>	<input type="checkbox"/> An inverse demand funnel, with clear assumptions for leads, deals, and revenue by source (marketing, sales, CS, and partners) <input type="checkbox"/> A specialized sales team, with each role responsible for "one thing"	<ul style="list-style-type: none"> • <i>"We need more focus on activity."</i> • <i>"We're not getting the leads we need from marketing."</i> • <i>"Our reps don't like to prospect."</i> • <i>"Our BDR team does a lot for us, prospecting, handling inbound leads, and a bit of sales ops."</i>
QUALITY OF CONVERSATIONS <i>"INSPECT AND CORRECT"</i>	<input type="checkbox"/> A defined sales process + playbook, with clear stages, process, and guidelines for "how we sell" <input type="checkbox"/> Training and certification for the sales team <input type="checkbox"/> A sales manager who "inspects and corrects" meetings, demos, process, and pipeline <input type="checkbox"/> Clear and consistent "menu" of offerings, how we price them, and if/how we discount	<ul style="list-style-type: none"> • <i>"Our reps need help knowing where to focus their time."</i> • <i>"Our forecasting could definitely improve."</i> • <i>"We need more consistency in how we talk to customers."</i>
MEETINGS & METRICS <i>"MAKE IT STICK"</i>	<input type="checkbox"/> One CRM, w/ simple fields, that people actually use <input type="checkbox"/> Quarterly Sales Strategy Review + Monthly Sales Performance Review w/ ParkerGale <input type="checkbox"/> Weekly pipeline reviews and 1:1s within the team <input type="checkbox"/> Monthly sales reporting that focuses on "The Big 5" pipeline metrics <input type="checkbox"/> A high-conviction sales forecasting process <input type="checkbox"/> Frequent reporting on activity, pipe, and CRM	<ul style="list-style-type: none"> • <i>"Our sales process could be better, but it's tough to know what to improve first."</i> • <i>"I wish I had more time to coach our reps."</i> • <i>"Our CRM data needs to be cleaned up before we can use it for reporting."</i> • <i>"Our CRM adherence isn't so great."</i>