

Sales is not “Magic”.

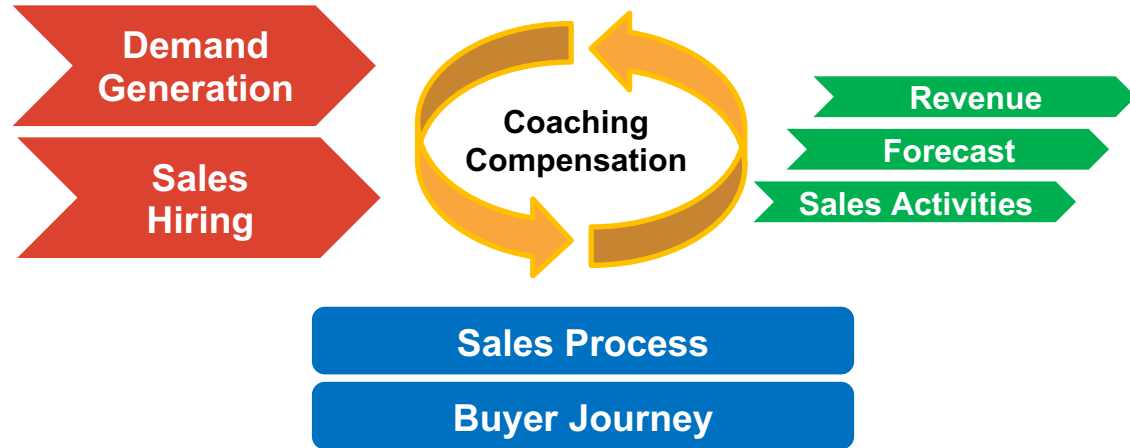
Process and data can make sales *predictable* and *scalable*

Sales is not a black box.

1. Hire salespeople
2. Assign them quota

Build a predictable, scalable sales machine.

Go-to-Market System Design



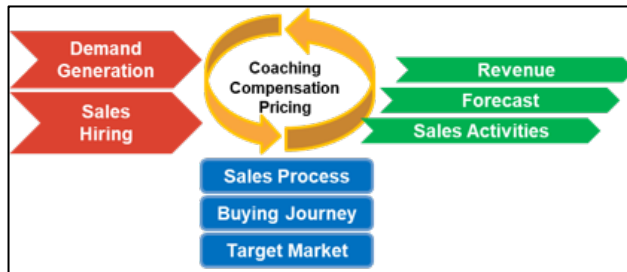
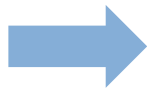
Optimal GTM System Design Depends on Context

Context consists of the product, buyer, and selling company



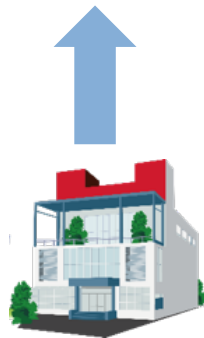
PRODUCT CONTEXT

- Complexity
- Price
- Category Maturity
- Product Maturity
- Onboarding requirements
- Competitive Landscape



BUYER CONTEXT

- Role(s)
- Industry
- Buyer Journey
- Local Culture

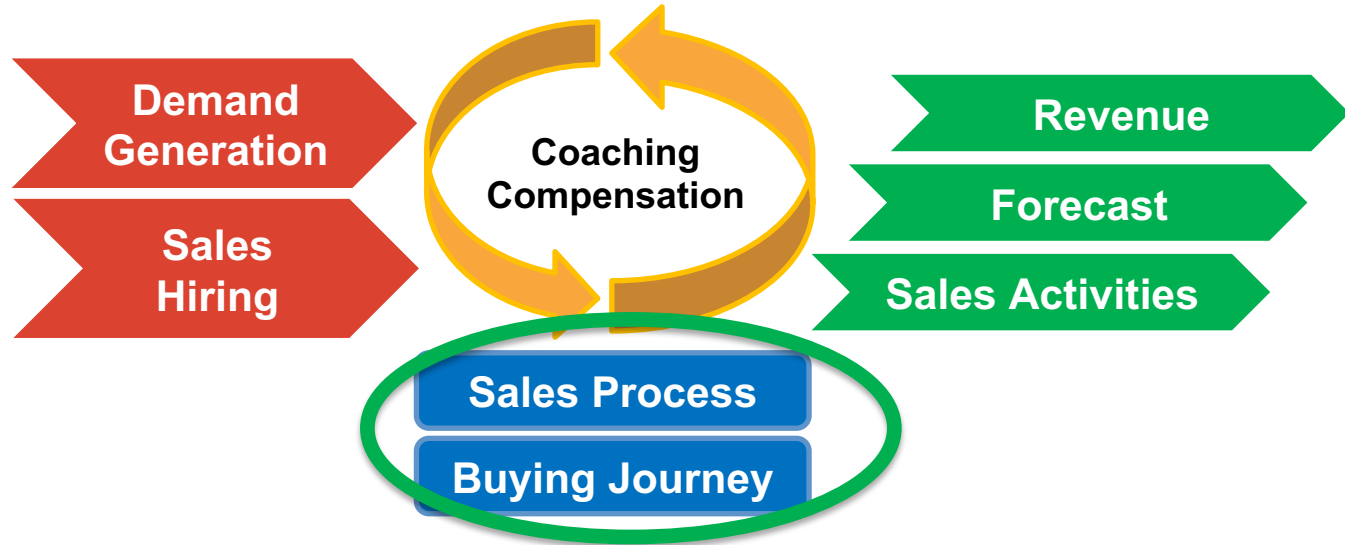


COMPANY CONTEXT

- Strategy
- Stage of Venture
- Culture

GTM System Design

Buying Journey and Sales Process

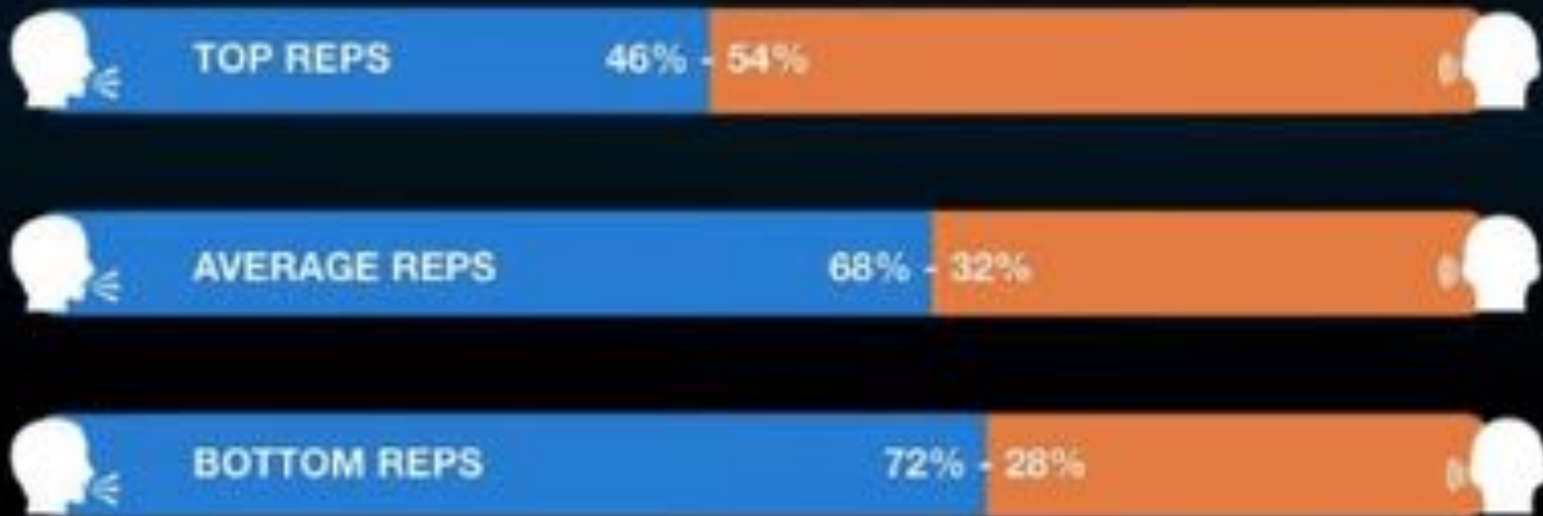


Discovery Call Talk / Listen Ratios:

Top, Middle, and Low Performers

TALK

LISTEN





Pothole Alert!

Show up and throw up

#1. Show up and throw up
(Inward-Out Approach)

Quit talking about how
great your product or
company is.

Nobody cares



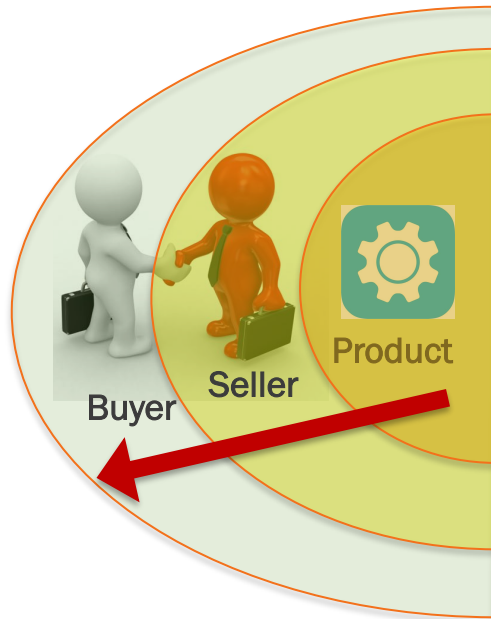
Alligator Selling
Big Mouth, Little Ears



Modern sales teams build a sales process the “supports” the buying journey

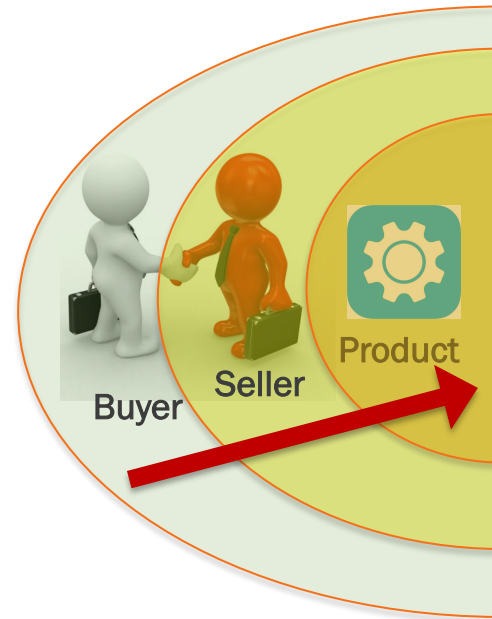
Legacy Sales Teams

Design sales process from inside out



Modern Sales Teams

Design sales process from outside in



Train Sales to “Live” in your Buyers’ World

Legacy Sales Teams

Teach salespeople to pitch the offering



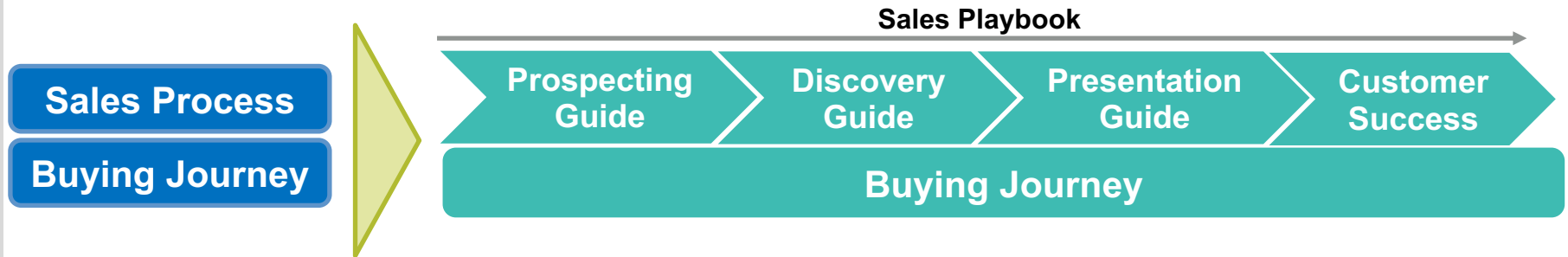
Modern Sales Teams

Teach salespeople to walk in the buyer’s shoes



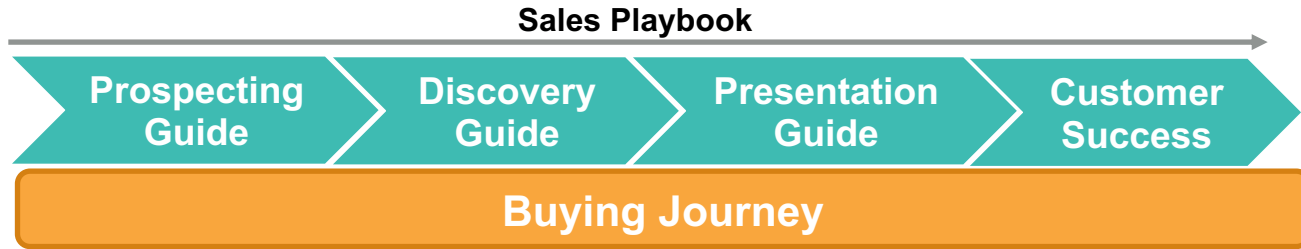
Modern Selling

Develop a Sales Process that Supports the Buyer Journey



Components of the Modern Sales Playbook

The Buying Journey



Buyer Journey Framework

Awareness

What are the buyers top challenges or goals?

Consideration

What categories of solutions do buyers investigate?

Decision

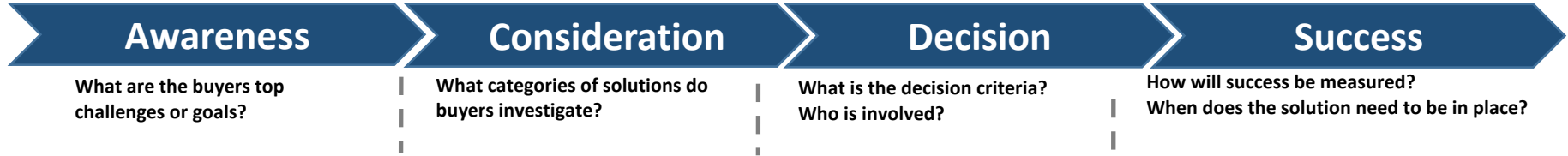
What is the decision criteria and who is involved?

Success

When does the solution need to be in place?
How will success be measured?
Who needs to be involved?

Buying Journey Example #1

Management Consulting and Software Vendor



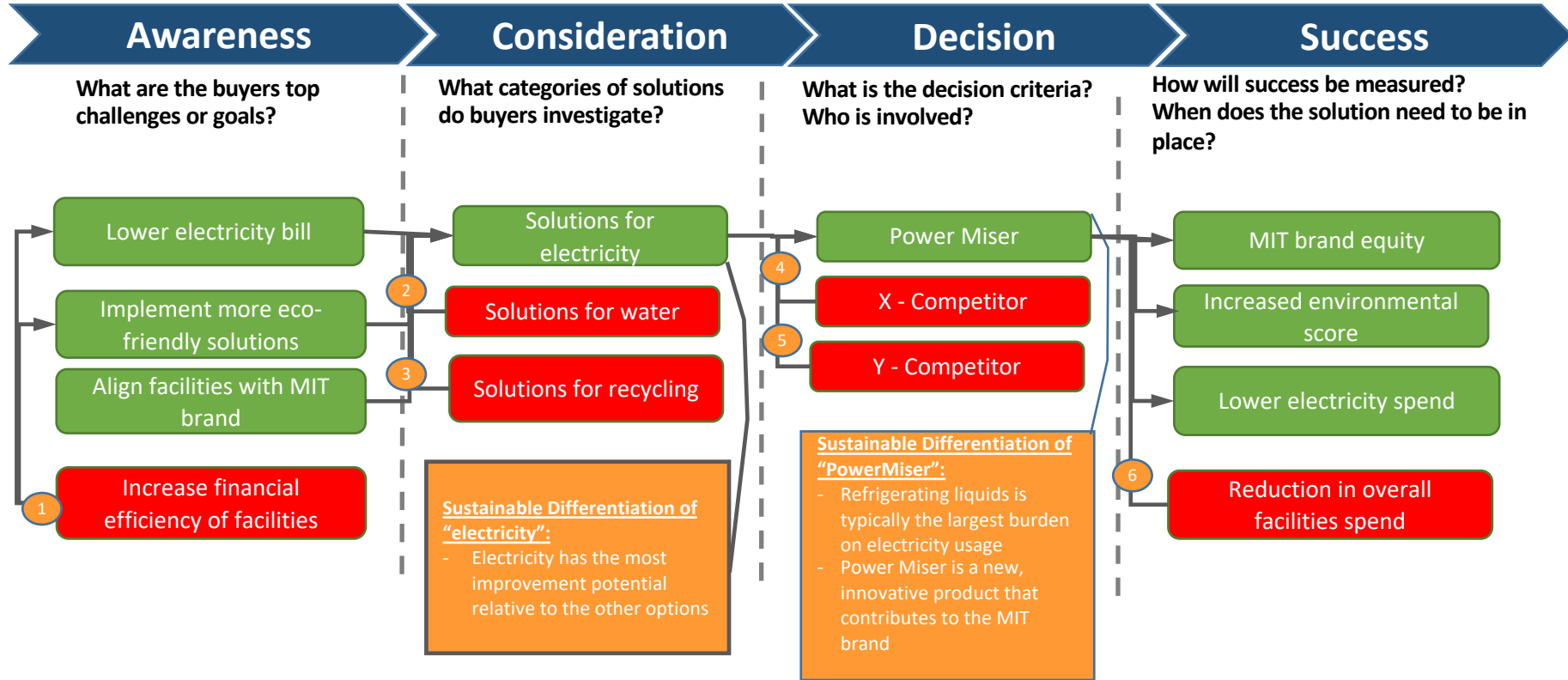
 Aligned with DataCo CVP

 Mis-aligned with DataCo CVP

 Playbook to Reframe Perspective

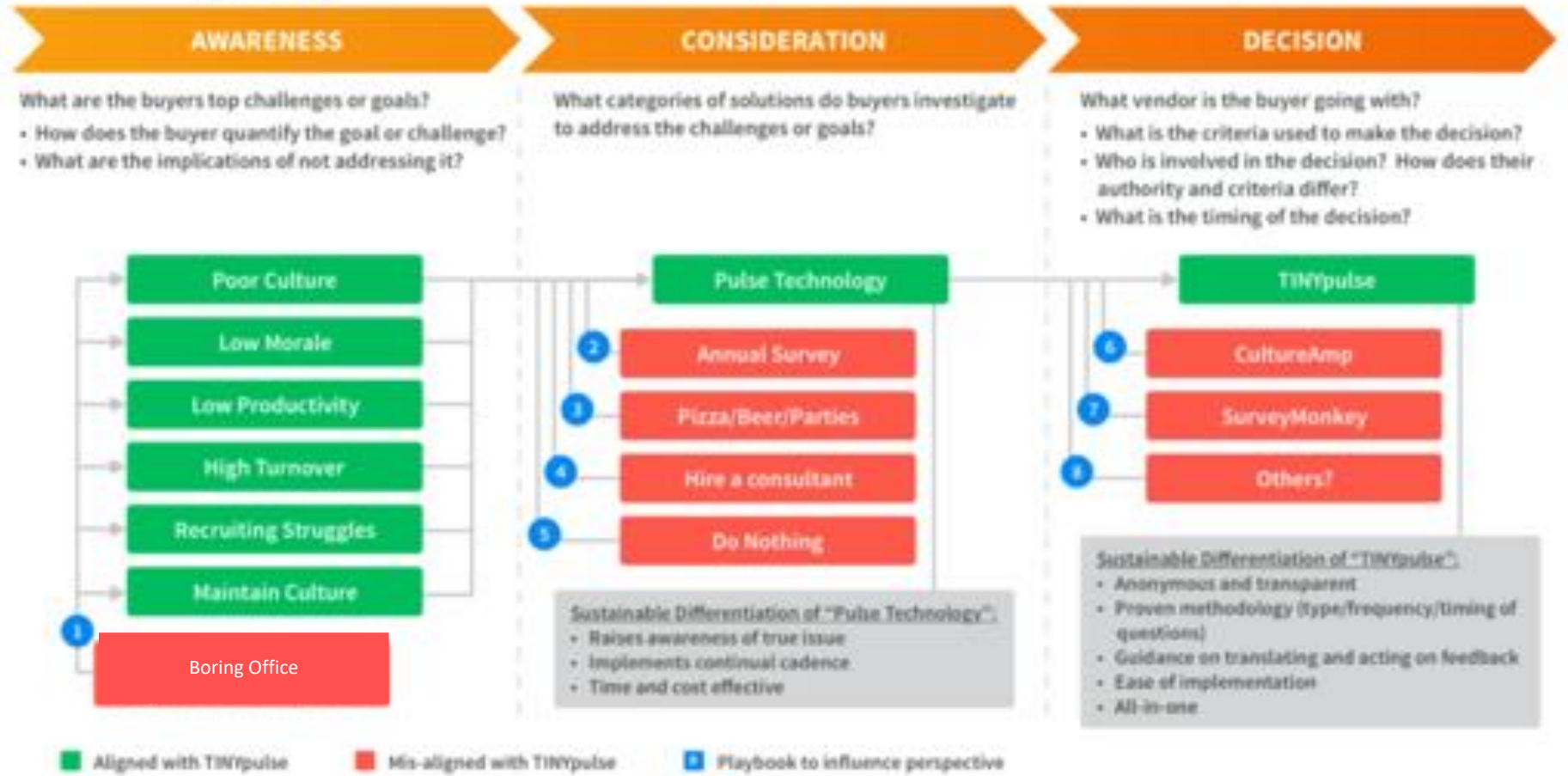
Buying Journey Example #2

Energy Saving Hardware



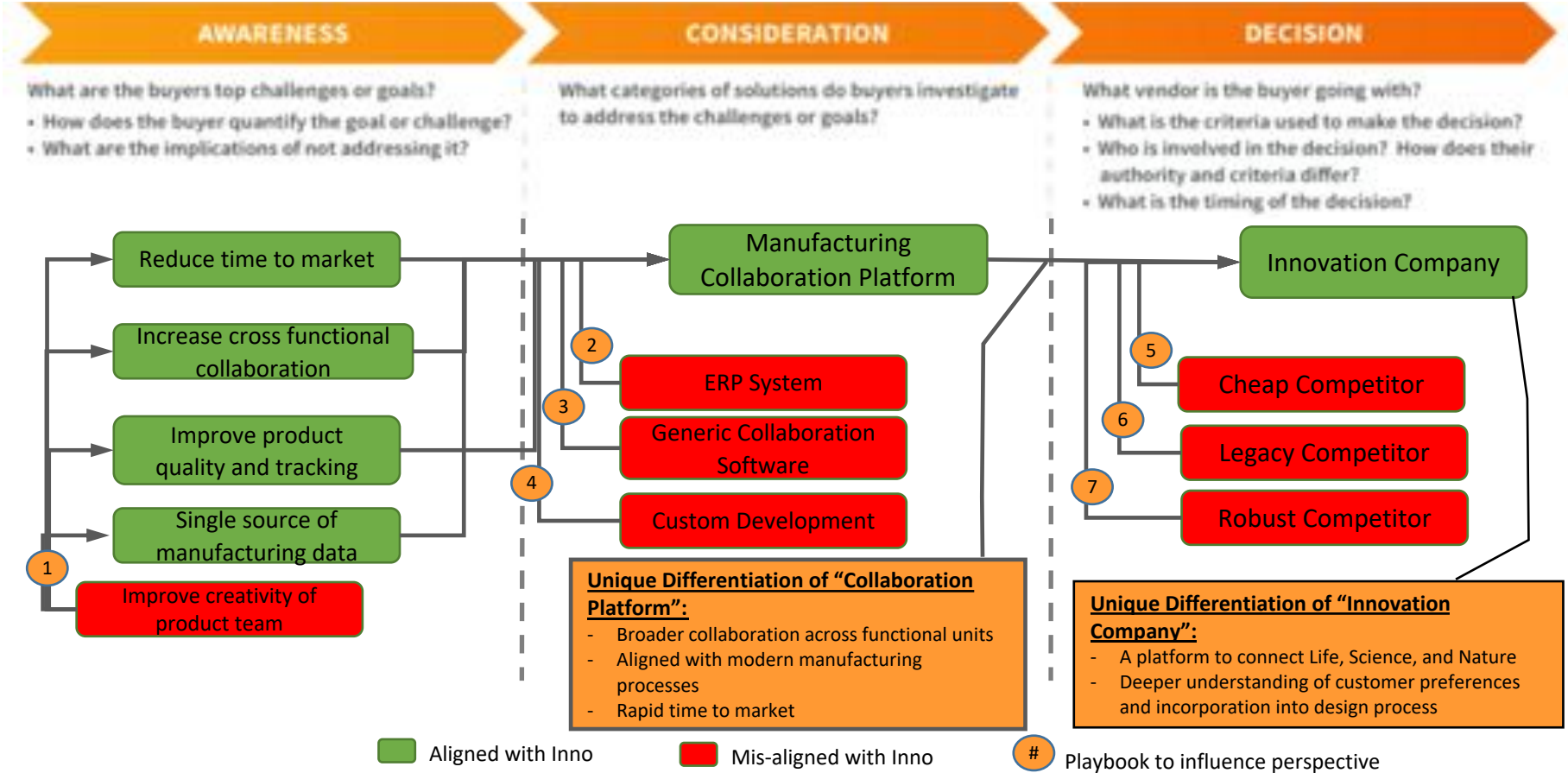
Buying Journey Example #3

Culture Monitoring Product



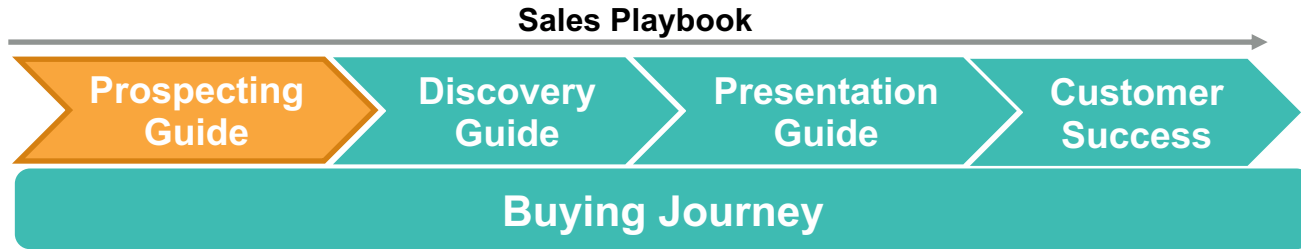
Buying Journey Example #4

Collaboration Software Platform



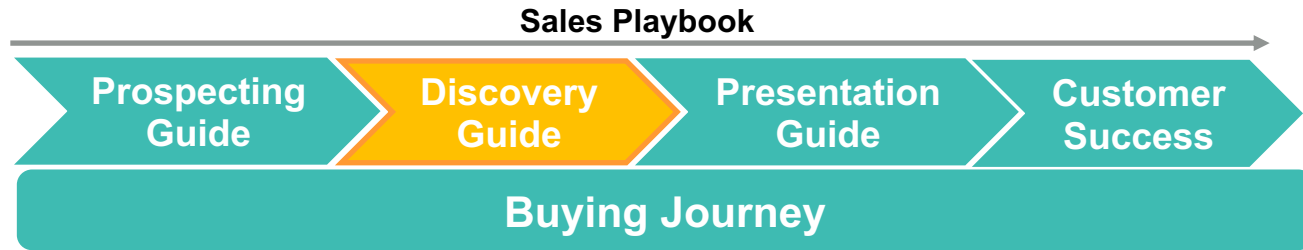
Components of the Modern Sales Playbook

The Prospecting Guide



Components of the Modern Sales Playbook

The Discovery Guide



Discover Guide - Template

Stage	Example Questions
Rapport Building	<ul style="list-style-type: none"> Q1: How do you think you've done overall? Q2: How do you think you've done overall? Q3: How do you think you've done overall?
Awareness	<ul style="list-style-type: none"> Q4: What's a trend that you like? What are you looking for in the future? Q5: What are you looking for in the future? Q6: What are you looking for in the future? Q7: What are you looking for in the future? Q8: What are you looking for in the future? Q9: What are you looking for in the future?
Consideration	<ul style="list-style-type: none"> Q10: How do you plan to address this? Q11: What have you done to help to improve this? Do it well? What are you looking for? Q12: Some questions take a really long time to answer. How do you consider the goal?
Decision	<ul style="list-style-type: none"> Q13: What would all you see to make the better? What about the better, better? Q14: How do you think about the list of numbers you are considering? Q15: How do you think about the combination of your previous goals that appeared in your previous decision? Q16: If you make no progress on the project, what's the best of the best, is that an issue? Why? Q17: What are you looking for in the future?
Recap & Next Steps	<ul style="list-style-type: none"> Q18: Thank you for the time to talk to me up to speed today. If I understand you correctly, ACME Company's executive team sees an excellent opportunity to reduce employee turnover, specifically in the engineering and sales departments. By implementing a simple but focused plan to address these issues that happens by doing so, the company hopes to decrease annual turnover from 20% to 15% annually. ACME's executive explored an initial meeting last year but the frequency was to often meet annually. You have a meeting with your CEO in 6 weeks and need to have a detailed presentation regarding your recommendations prepared by then. Do you have the information ready?

Discover Guide - Template

Stage	Example Questions
Rapport Building	<ul style="list-style-type: none"> 1. How's the marketing landscape looking? 2. How's the competition? 3. How's the economy?
Awareness	<ul style="list-style-type: none"> 4. "I saw a tweet that you did X. What was the story behind that one?" 5. "You're doing great work lately!" 6. "I saw you got a promotion recently. What was the role that led to that?" 7. "I saw you were in London. How did that go?" 8. "I saw you were in London. How did that go?" 9. "I saw you were in London. How did that go?" 10. "I saw you were in London. How did that go?"
Consideration	<ul style="list-style-type: none"> 11. "How do you plan to address that?" 12. "What have you tried to do to improve that?" 13. "Have you tried to do anything else?"
Decision	<ul style="list-style-type: none"> 14. "What would all you see to make the decision?" 15. "How do you expect that to fit in with your other priorities?" 16. "I see, that's a big decision. How do you expect that to fit in with your other priorities?" 17. "If you had to choose between the two options, which one would you choose?" 18. "What are the pros and cons of each option?"
Recap & Next Steps	<ul style="list-style-type: none"> 19. "Thank you for the time to talk today. I'll summarize your comments, ACME Company's marketing team will explore opportunities to reduce employee turnover, specifically in the engineering and sales departments. We implemented a program that focused on work-life balance, which has helped. We also see the company needs to decrease annual turnover from 20% to 15% annually. ACME considers exploring an annual bonus but you feel the frequency may be offset over time. You have a meeting with your CEO in 2 weeks and want to have a detailed presentation regarding your recommendations prepared by then. Do you have any other questions?"

Rapport Building

1. Attempt 1: Chit-chat that subtly transitions to exploration
 - a) "I noticed on LinkedIn that you recently added a marketing ops leader. What triggered the hire?"
 - b) "I read that you added three global offices last year. Has that affected your team?"
 - c) "You are 6 months into the acquisition of TOP software. How has the company perceived the progress?"
2. Attempt 2: Basic Open Ended
 - a) "What peaked your interest in a meeting with us?"
3. Attempt 3: Closed Ended Options
 - a) "I know we only have 10 minutes so I did some homework on you and your business. Based on ACME's strategy as well as trends that others in your industry have discussed with me, I assume your biggest priority is either measuring return on ad spend, improving attribution across campaigns, or lowering marketing CAC. In order to make this discussion as useful as possible to you, would you mind indicating which is the highest priority for you? Why?"

Discover Guide - Template

Stage	Example Questions
Rapport Building	<ul style="list-style-type: none"> Q1: How do you currently measure success? Q2: How do you measure success? Q3: How do you measure success?
Awareness	<ul style="list-style-type: none"> Q4: "I'd like to understand how you measure success today?" Q5: "How do you measure success today?" Q6: "How do you measure success today?" Q7: "How do you measure success today?" Q8: "How do you measure success today?" Q9: "How do you measure success today?"
Consideration	<ul style="list-style-type: none"> Q10: "How do you plan to measure success?" Q11: "What have you tried in the past to improve success? Did it work? What did you try to do next?" Q12: "Given experience, take a really quick or another perspective, how do you consider the goal?"
Decision	<ul style="list-style-type: none"> Q13: "What would all you use to make the decision? What about the decision, what?" Q14: "How do you measure success today? How do you measure success?" Q15: "How do you measure success today? How do you measure success?" Q16: "If you had to measure success today, how would you measure success today?" Q17: "What are you looking to do next in the decision?"
Recap & Next Steps	<ul style="list-style-type: none"> Q18: "Thank you for the time to talk today. I'll understand you correctly, ACME Company's executive team sees an excellent opportunity to reduce employee turnover, specifically in the engineering and sales departments. By implementing a strategy that focuses on understanding about that opportunity. By doing so, the company hopes to decrease annual turnover from 25% to 20% annually. ACME Corporation explored an initial strategy but you feel the frequency rate to obtain that objective. You have a meeting with your CEO in 6 weeks and need to have a detailed presentation regarding your recommendations prepared by then. Do you have the information you need?"

Awareness Stage Questions

1. What is Marketing CAC today? How is it calculated? Is it increasing or decreasing?
2. How confident are you in the accuracy of your cost attribution? How does the process work today? What gaps are you most concerned about?
3. Why has campaign measurement become a priority now? What changed?
4. What is being asked of you next year that is different than past years? Do you feel prepared?

Discover Guide - Template

Stage	Example Questions
 Rapport Building	<ul style="list-style-type: none"> Q1: "How do you define success?" Q2: "What's your top priority?" Q3: "What are your biggest challenges?"
 Awareness	<ul style="list-style-type: none"> Q4: "What's a trend that you think will shape your industry in the next 5 years?" Q5: "What do you think is the biggest opportunity for your company?" Q6: "What's the biggest challenge you're facing right now?" Q7: "How do you see your market changing in the next 3 years?" Q8: "What's the biggest risk you're taking right now?" Q9: "What's the biggest success you've had in the last 12 months?"
 Consideration	<ul style="list-style-type: none"> Q10: "How do you plan to address this?" Q11: "What have you tried to do to solve this problem? Did it work? What did you try to do next?" Q12: "Have you ever used a similar tool or service? How do you compare that one?"
 Decision	<ul style="list-style-type: none"> Q13: "What would all you see to make this happen? What about the biggest obstacle?" Q14: "How do you measure the success of this project?" Q15: "What's the biggest risk or challenge to your project goals that you're most concerned about?" Q16: "If you had to stop this project on the ground, what would be the biggest reason? Why?" Q17: "Who else needs to be involved in this decision?"
 Recap & Next Steps	<ul style="list-style-type: none"> Q18: "Thank you for the time you've spent with me today. If I understand you correctly, ACME Company's executive team sees an immediate opportunity to reduce employee turnover, specifically in the engineering and sales departments. By implementing a simple but focused plan to address these issues that happens by Q3 2024, the company hopes to decrease annual turnover from 20% to 15% annually. ACME's executive team is excited to work with you but the frequency and volume of data is a challenge. You have a meeting with you (CEO) in 2 weeks and need to have a detailed presentation regarding your recommendations prepared by then. Do you have the information ready?"

Consideration Stage Questions

1. Have you traditionally managed these programs internally or externally? Why? What is your preference in the future?
2. Have you implemented software in the past to help with these efforts? What worked and what didn't?
3. Were you pleased with the outcomes of past efforts? What gaps were frustrating?
4. How often do you want insights into these metrics? Are there certain solutions that meet these timing needs better than others?

Discover Guide - Template

Stage	Example Questions
Report Building	<ul style="list-style-type: none"> 1. How do you define the business problem? 2. How do you define the goal? 3. How do you define the success criteria?
Awareness	<ul style="list-style-type: none"> 4. "Is there a problem? How big is it? What are the symptoms and what are the causes?" 5. "Do you know what you need to solve it?" 6. "What are the options? How do you know they are the best? What are the risks of each?" 7. "Do you have other options? How do you know they are the best?" 8. "Do you know what the success criteria are? How do you know they are the best?" 9. "Do you know what the success criteria are? How do you know they are the best?"
Consideration	<ul style="list-style-type: none"> 10. "How do you plan to address the issue?" 11. "What have you tried in the past to address the issue? Did it work? What did you try to do?" 12. "Have you considered other options? How do you know they are the best?"
Decision	<ul style="list-style-type: none"> 13. "What criteria will you use to make the decision? What does the decision criteria look like?" 14. "How do you know that the list of vendors you are considering is the best?" 15. "How do you know that the list of vendors you are considering is the best?" 16. "If you make no progress on these programs between now and the end of the year, is that an issue? Why?" 17. "Who else needs to be involved in this decision?"
Recap & Next Steps	<ul style="list-style-type: none"> 18. "Thank you for the time to talk today. I'll summarize your concerns, ACME Company's solution team will create an opportunity to reduce employee turnover, specifically in the engineering and sales departments. We implemented a program last Tuesday that will reduce turnover by 20% annually. We will be the company leader in turnover annual loss rate from 20% to 10% annually. ACME Corporation explored an annual survey last year but the frequency was to often and it didn't work. You have a meeting with your CEO in 6 weeks and need to have a detailed presentation regarding your recommendations prepared by then. Do you have the information ready?"

Decision Stage Questions

1. "What criteria will you use to make the decision? What drives this decision criteria?"
2. "Have you narrowed down the list of vendors you are considering?"
3. "Is cost, time to value, or customization to your precise goals most important in your solution decision?"
4. "If you make no progress on these programs between now and the end of the year, is that an issue? Why?"
5. "Who else needs to be involved in this decision?"

Discover Guide - Template

Stage	Example Questions
Rapport Building	<ul style="list-style-type: none"> 41. "Hi, I'm [Name], and I'm a [Title] at [Company]. How are you today?" 42. "How do you like your coffee?" 43. "How do you like your coffee?"
Awareness	<ul style="list-style-type: none"> 44. "I'd like to introduce you to a new product. Would you be interested in learning more?" 45. "How do you like your coffee?" 46. "How do you like your coffee?" 47. "How do you like your coffee?" 48. "How do you like your coffee?" 49. "How do you like your coffee?"
Consideration	<ul style="list-style-type: none"> 50. "How do you like your coffee?" 51. "How do you like your coffee?" 52. "How do you like your coffee?"
Decision	<ul style="list-style-type: none"> 53. "How do you like your coffee?" 54. "How do you like your coffee?" 55. "How do you like your coffee?" 56. "How do you like your coffee?" 57. "How do you like your coffee?"
Recap & Next Steps	<ul style="list-style-type: none"> 58. "Thank you for the time to catch me up to speed Sarah. If I understand you correctly, ACME Company's executive team sees an enormous opportunity to improve return on ad spend by leveraging a best-in-class BI tool that analyzes recent historical data and is supported by an outside expert who has helped peer companies through this journey. By doing so, the company hopes to increase website conversion rate by 10% by the end of the year. ACME corporation tried to use a 3rd party consultant last year but the party struggled to process the amount of data you had. You have a meeting with your CEO in 6 weeks, at which time she will expect an update on the strategy. Do I have this information correct?"

Recap & Next Steps Example

"Thank you for the time to catch me up to speed Sarah. If I understand you correctly, ACME Company's executive team sees an enormous opportunity to improve return on ad spend by leveraging a best-in-class BI tool that analyzes recent historical data and is supported by an outside expert who has helped peer companies through this journey. By doing so, the company hopes to increase website conversion rate by 10% by the end of the year. ACME corporation tried to use a 3rd party consultant last year but the party struggled to process the amount of data you had. You have a meeting with your CEO in 6 weeks, at which time she will expect an update on the strategy. Do I have this information correct?"

Aligning Sales Playbook with Customer Retention

Qualifying Matrix for Buying *AND* Retention

Sales Qualifying Matrix

Customer Likelihood to Buy

Examples

[B]udget	[M]etrics
[A]uthority	[E]conomic Buyer
[N]eed	[D]ecision Maker
[T]iming	[D]ecision Process
	[I]dentify Pain
	[C]hampion

Customer Success Qualifying Matrix

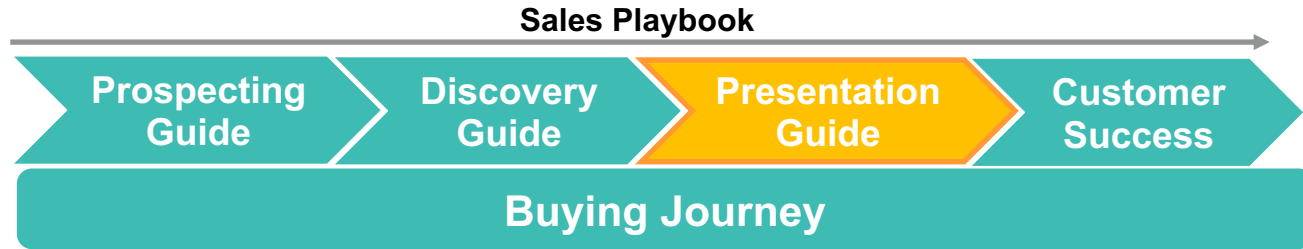
Customer Likelihood to Succeed

Examples

[C]ontent	[U]ser Bought In
[C]ommitment	[R]ealistic ROI
[C]oncept of a Lead	[I]T Bought In
	[T]ech Feasible

Components of the Modern Sales Playbook

The Presentation Guide



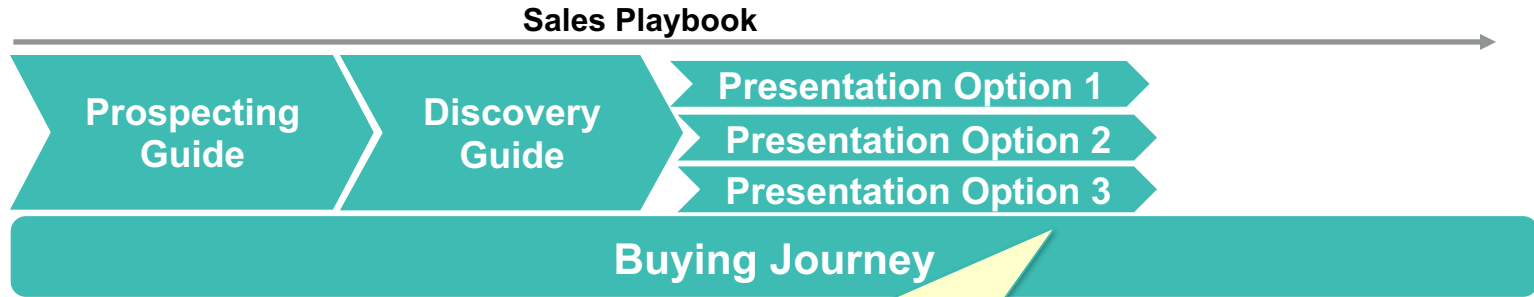
Components of the Modern Sales Playbook

The Presentation Guide



Components of the Modern Sales Playbook

Create Presentation “Swim Lanes” to Tailor the Presentation to the Discovery Findings

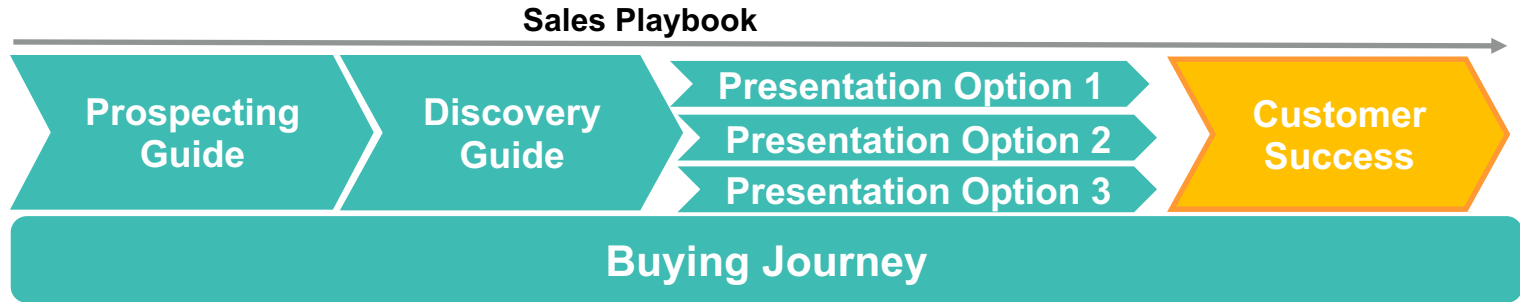


Presentation Best Practices

1. Recap buyer context
2. Share company vision
3. Illustrate service capability to meet buyer needs
4. Present case study aligned with buyer context
5. Discuss price, integration, training, etc.
6. Ask for questions
7. Recap findings and ask for the business

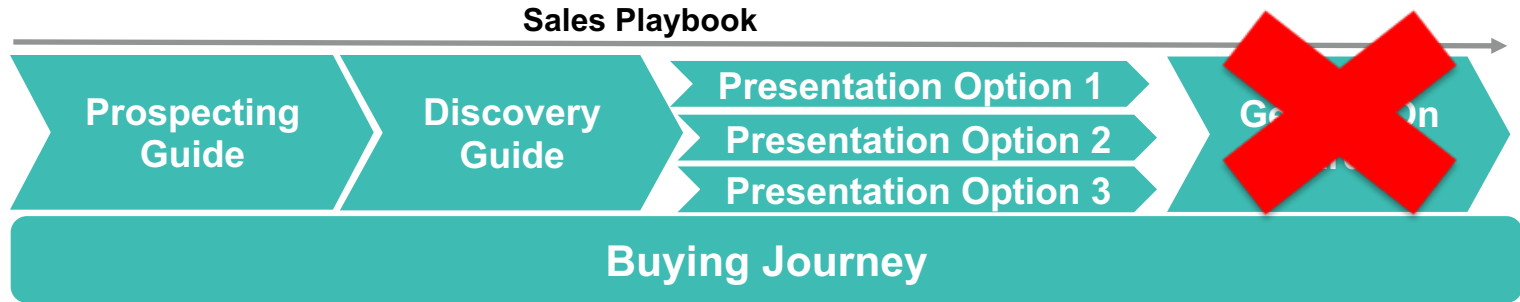
Components of the Modern Sales Playbook

Customer Success



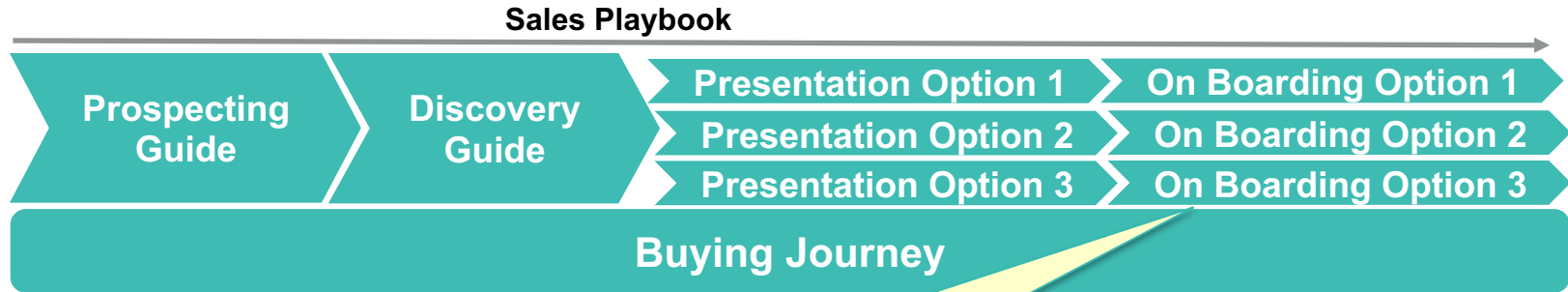
Components of the Modern Sales Playbook

Customer Success



Components of the Modern Sales Playbook

Create Customer On-Boarding Swim Lanes to Match Presentation Swim Lanes

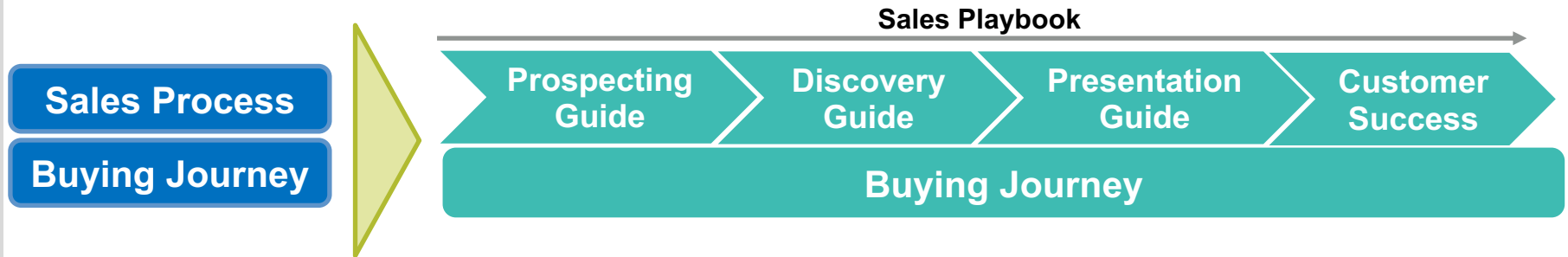


Customer On-boarding Best Practices

1. Recap buyer context
2. Ask for customer verification / adjustment
3. Recommend tailored on-boarding process

Modern Selling

Develop a Sales Process that Supports the Buyer Journey



Use Daily Film Reviews to Optimize the Buying Journey and Sales Process

1. Buyer Journey
2. Discovery Guide
3. Presentation Guide

Iterate Sales Playbook

Conduct Daily Film Reviews



Reflect on and Apply Learnings

1. Was the sales playbook optimal for this prospect or were their gaps?
2. If there were gaps, are they unique to this prospect or representative of the customer segment?

Film Review Setup

- 1 salesperson records call
- 1 salesperson prepares positive feedback
- 1 salesperson prepares needs for improvement feedback

Film Review Meeting Flow

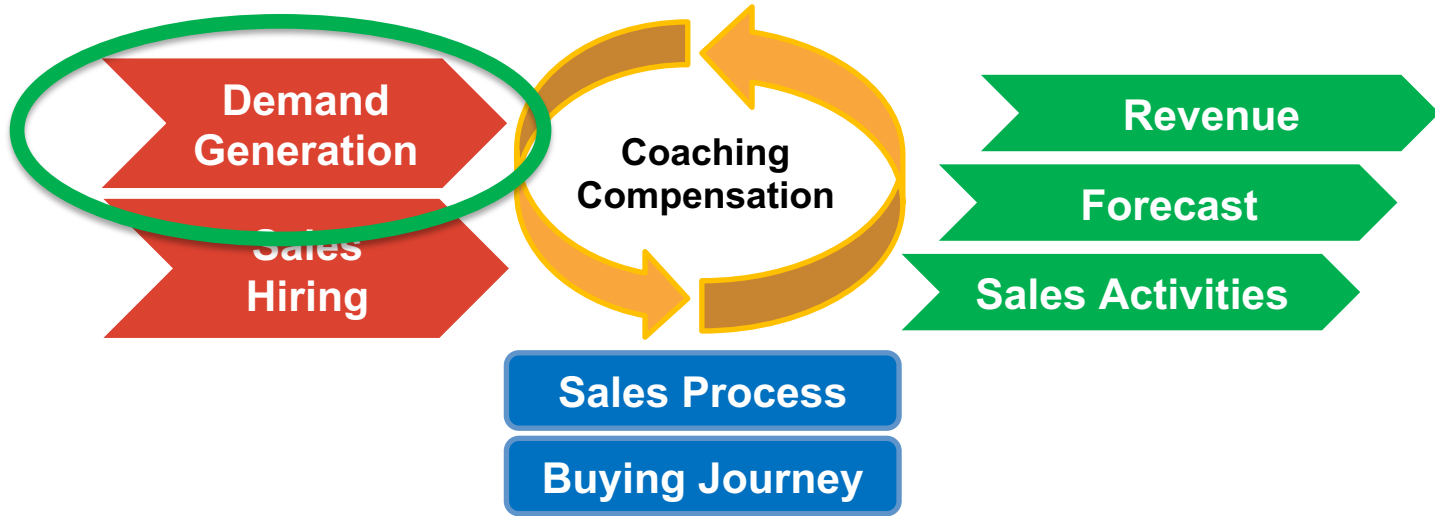
1. Listen to call as a team
2. Self assessment from salesperson with recording
3. Positive feedback
4. Areas of improvement
5. Open for team comments
6. Manager recap

Certify Each Salesperson on the Buyer Journey and Sales Process

Discovery Call Certification				
SALESPERSON SUMMARY				
Salesperson Name:	John Doe			
Primary Criteria Score:	80%			
Summary of Strengths:	<strength #1> <strength #2>			
Summary of Improvement Areas:	<improvement area #1> <improvement area #2>			
Certification Achieved:	Yes			
PRIMARY CRITERIA	Score (1 to 10 Scale)	Weight	Weighted Score	Max Score
Preparation for Discovery Call	8	5	40	50
Logistics Setup	9	5	45	50
Energy/Voice Tone	9	6	54	60
Rapport/Commonality	10	5	50	50
Trust Developmet	7	7	49	70
Agenda/Expectations	9	5	45	50
Understanding Buyer Goals	10	10	100	100
Understanding Buyer Plan	6	10	60	100
Understanding Buyer Challenges	6	8	48	80
Understanding Buyer Timeline	9	10	90	100
Understanding Budget/Authority	4	8	32	80
Discovery on Traffic Generation	9	6	54	60
Discovery on Lead Conversion	8	6	48	60
Discovery on Lead Nurturing	9	6	54	60
Discovery on Analytics	8	6	48	60
Challenge/Re-set Strategy	7	10	70	100
Next Steps	10	8	80	80
TOTAL			967	1210
				80%

GTM System Design

Demand Generation





How do you buy?

Cold Call?

Cold email?

Google?

Social Media?

Align Demand Generation with Modern Buyer

BLOG



SEO



SOCIAL MEDIA



*“JOURNALISTS” hold the keys to the
future of Demand Generation*

Create Your Content Engine

The screenshot displays the HubSpot Blog homepage. At the top, there is a navigation bar with links for 'WHAT IS HUBSPOT?', 'WHO USES HUBSPOT?', 'MARKETING RESOURCES', 'ABOUT US', 'SEO', and 'BLOG'. A search bar is located on the right side of the navigation bar. Below the navigation bar, the HubSpot logo is prominently displayed, followed by the text 'Inbound Internet Marketing Blog' and a subtitle 'SEO, Blogging, Social Media, Landing Pages, Lead Generation and Analytics'. A secondary navigation bar lists categories: 'Inbound Marketing', 'Social Media', 'Search Engine Optimization', 'Twitter', 'Lead Generation', 'Public Relations', 'Web Analytics', and 'Web Design'. A large banner for 'How to Use Google+ For Business' is featured, with the text 'Get the Most Comprehensive Guide to Google+ for Business' and a 'Download Free Ebook!' button. Below the banner, two main article teasers are visible. The first article is titled 'How to Separate the Good Marketing Leads From the Bad' and includes a 'SUBSCRIBE' sidebar with social media icons and an email subscription form. The second article is titled 'The Marketer's Ultimate Guide to Link Bait' and includes a 'Free Website Redesign Kit' sidebar. The overall layout is clean and professional, with a focus on providing valuable content and promoting the HubSpot ecosystem.

Internet Marketing Blog | Home

blog.hubspot.com

WHAT IS HUBSPOT? WHO USES HUBSPOT? MARKETING RESOURCES ABOUT US SEO BLOG

SEARCH GO

HubSpot Blog

Inbound Internet Marketing Blog
SEO, Blogging, Social Media, Landing Pages, Lead Generation and Analytics

Inbound Marketing Social Media Search Engine Optimization Twitter Lead Generation Public Relations Web Analytics Web Design

How to Use Google+ For Business

Get the Most Comprehensive Guide to Google+ for Business

Download Free Ebook!

How to Separate the Good Marketing Leads From the Bad

28
Like
273
Tweet
3
Read More

Posted by Meghan Keirney Anderson

Comments

Tags: lead nurturing, lead management, introductory

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email address

The Marketer's Ultimate Guide to Link Bait

29
Like
314
Tweet
23
Read More

Can we please come up with some better terminology for the concept of 'link bait,' already? It just sounds so ... silly. For me, it conjures up thoughts of those evil bait-and-switch advertising schemes.

Link Bait

Free Website Redesign Kit

Click Here

FREE KIT

Create Your Content Calendar



1

eBook w/ LP / Month



Create Your Content Calendar



1

eBook w/ LP / Month



4

Blog Posts / Month



[The Ultimate Guide to Mastering Pinterest for Marketing](#)

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[6 Compelling Reasons You Should Use Pinterest for Marketing](#)

Feb 17, 2012 ... Learn why your business should jump on the Pinterest bandwagon for marketing.
blog.hubspot.com/.../6-Compelling-Reasons-You-Should-Use-Pinterest-for-Marketing.aspx



[7 Examples of Brands That Pop on Pinterest](#)

Feb 2, 2012 ... 7 great real-life examples of brands that are effectively using Pinterest for marketing.
blog.hubspot.com/.../7-Examples-of-Brands-That-Pop-on-Pinterest.aspx



[How to Master Pinterest for B2B Marketing](#)

Feb 21, 2012 ... How B2B companies can leverage Pinterest for marketing.
blog.hubspot.com/.../How-to-Master-Pinterest-for-B2B-Marketing.aspx

Create Your Content Calendar



1

eBook w/ LP / Month



4



Blog Posts / Month



8



FB Posts / Month



Create Your Content Calendar



1

eBook w/ LP / Month



4



Blog Posts / Month



8



FB Posts / Month



16



Tweets / month

Tweets All / No replies



HubSpot @HubSpot

44m

More than 80% of email marketers send the same content to all subscribers - [ow.ly/cfRXO](#)

Expand



HubSpot @HubSpot

1h

RT @lonibenfield: Just booked my flight for #Inbound12! Can't believe that @cindyasuper is performing! @HubSpot - coolest conference ever!!

Expand



HubSpot @HubSpot

2h

Is it Time to Kill Lead Nurturing as We Know It? [hub.am/PfRnta](#)

Expand



HubSpot @HubSpot

2h

Foster your creativity and get prepared to create some stellar calls-to-action! - [ow.ly/cfRXN](#)

Expand



HubSpot @HubSpot

3h

Blog reading peaks around 10AM - [ow.ly/cfRXM](#)

Expand



HubSpot @HubSpot

4h

Why does @HeritageEnviro HubSpot? Check it out! #HubSpotting - [ow.ly/cfRXK](#)

Expand



HubSpot @HubSpot

5h

Tomorrow at 2pm EST, join us for a free webinar with @LinkedIn: How to Master LinkedIn for Marketing #MasterLI - [ow.ly/cfRXJ](#)

Expand



HubSpot @HubSpot

5h

How to Separate the Good Marketing Leads From the Bad [hub.am/NzbeDg](#)

Expand

Create Your Content Calendar



1

eBook w/ LP / Month



4



Blog Posts / Month



8



FB Posts / month



16



Tweets / month

Mon	Tue	Wed	Thu	Fri
1	2 f Question1	3 t Article 1	4 s Blog Post t Blog Post	5
8 f New Demo	9 y New Demo t New Demo	10 s Blog Post t Blog Post	11 t Article 2	12 f Fun Friday
15	16 f Question 2	17 t Article 3	18 s Blog Post	19 y Big Question
22 t Article 4	23 y Customer f Customer	24 t Article 5	25 y Training s Blog Post	26 f Fun Friday
29	30 f Question 3	1	2	3

Demand Generation Case Study



- Recruiter for life sciences industry
- 8 global offices (U.K., Germany, Switzerland, China, etc.)
- 120 employees

Problem

- Over-reliance on cold calling and event networking for demand
- Stagnant visitor and lead growth from company website
- Misalignment between digital content and buyer journey

Solution

- Clear definition of buyer personas
- Content campaigns focused on buyer education as opposed to service offerings
- Served content to buyers based on persona and stage of buying process

Demand Generation Case Study

Why do your employees leave?

It's not just about the money. It's about the quality of the work environment and the quality of the work itself.

In this report, you will discover the reasons why employees leave and how you can improve your organization's ability to attract, retain and engage top talent.

Employees that feel a sense of purpose and engagement are more productive and committed. Increase your engagement today.

For more insights, register for our free report.

staff science

Employee Engagement Report 2017

Get your copy of ProClinical's report on employee engagement in the global life sciences industry

Complete the form to access the report

First Name*

Last Name*

Work email address*

Country*
- Please Select -

Are you an employer or a jobseeker?*

- Please Select -

DOWNLOAD ENGAGEMENT REPORT

Demand Generation Case Study

What is the biggest challenge? Uncovering the future of research...

We can also expect biotechnology even their oncology pipeline development.

Want to be a part of a company that work science professionals simply spread your

How to write a CV that gets you interviews

Proven methods to get your CV noticed and inside information on what recruiters and employers in the life sciences sector are actually looking for

Do you want to increase the success rate of your job applications and get more interviews?

Our free guide reveals what happens to your CV when you apply for a job, and contains advice from ProClinical consultants on what to include, what not to include and the reasons why your CV might be getting rejected.

By reading this guide you will gain:

- An understanding of who is looking at your CV and what they are looking for
- An understanding of what information is vital to include and what you should leave out
- Techniques to increase the probability of your CV being shortlisted by a recruiter or hiring manager
- Recommendations on how to format your CV to make key information stand-out



Get your free guide:

First name*

Last name*

Email address*

Job Title*

What is your area of expertise?
- Please Select -

[DOWNLOAD CV GUIDEBOOK](#)

How to write a CV that gets you interviews
Simple and easy to follow

[DOWNLOAD](#)

Topic: Life sciences

[Twitter](#) [LinkedIn](#)

[Facebook](#) [LinkedIn](#) [Twitter](#) [YouTube](#) [Google+](#)

Demand Generation Case Study



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- 8 global offices (U.K., Germany, Switzerland, China, etc.)
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Problem

- Over-reliance on cold calling and event networking for demand
- Stagnant visitor and lead growth from company website
- Misalignment between digital content and buyer journey

Solution

- Clear definition of buyer personas
- Content campaigns focused on buyer education as opposed to service offerings
- Served content to buyers based on persona and stage of buying process

Result

- 14x increase in web traffic (5K per month to 70K per month)
- 15x in leads (80 leads per month to 1200 leads per month while reducing spend)
- 100% annual revenue growth

Demand Generation Case Study



Sales and Marketing Alignment



SQL vs. MQL: How Marketers Should Define and Qualify Leads

Step 1: Define MQL

- Agree with Sales
- Base on Company, not Contact

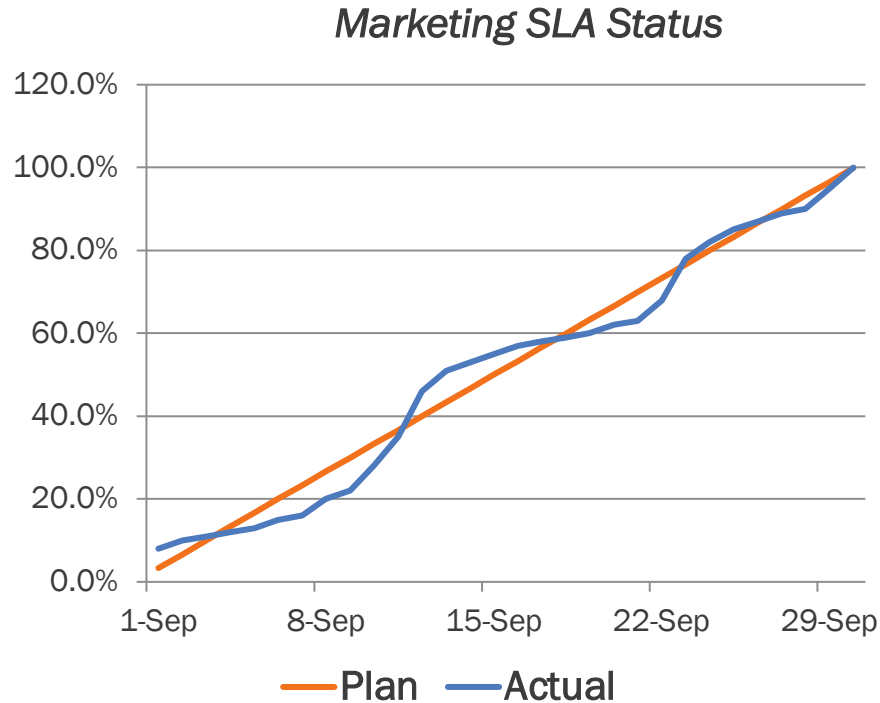
Step 2: Quantify Marketing Output

Channel	Appointment -> Customer %	Average Bookings per Customer	Appointment Value
Outbound	3%	\$100,000	\$3,000
Marketing	5%	\$80,000	\$4,000
Field Sales	8%	\$120,000	\$9,600

Step 2: Quantify Marketing Output

		Engagement		
		C	B	A
Role	A	\$800	\$900	\$1000
	B	\$200	\$500	\$750
	C	\$100	\$250	\$400
		Blog Sign-Up	eBook Download	Demo Request

#4: Monitor Marketing Daily



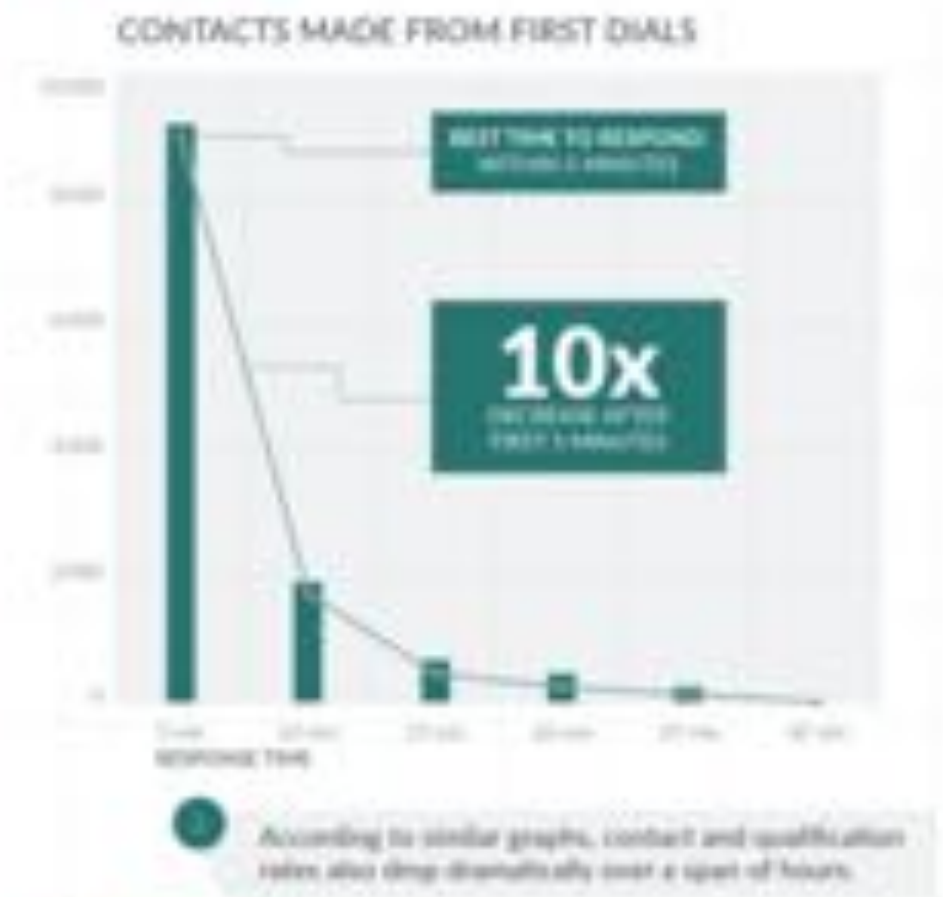
Inside Sales Demand Generation Research

CONTACTS MADE FROM FIRST DIALS

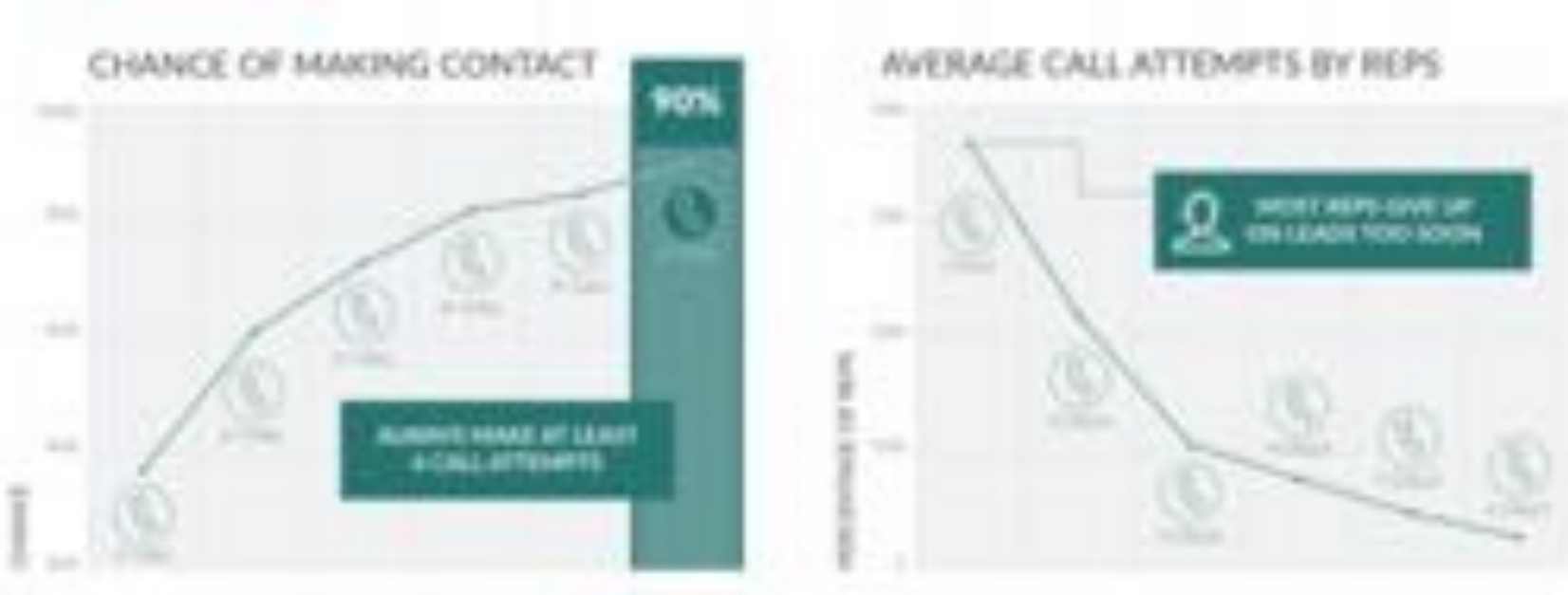


1 According to similar graphs, between 4pm and 5pm is the best time to qualify leads.

Inside Sales Demand Generation Research



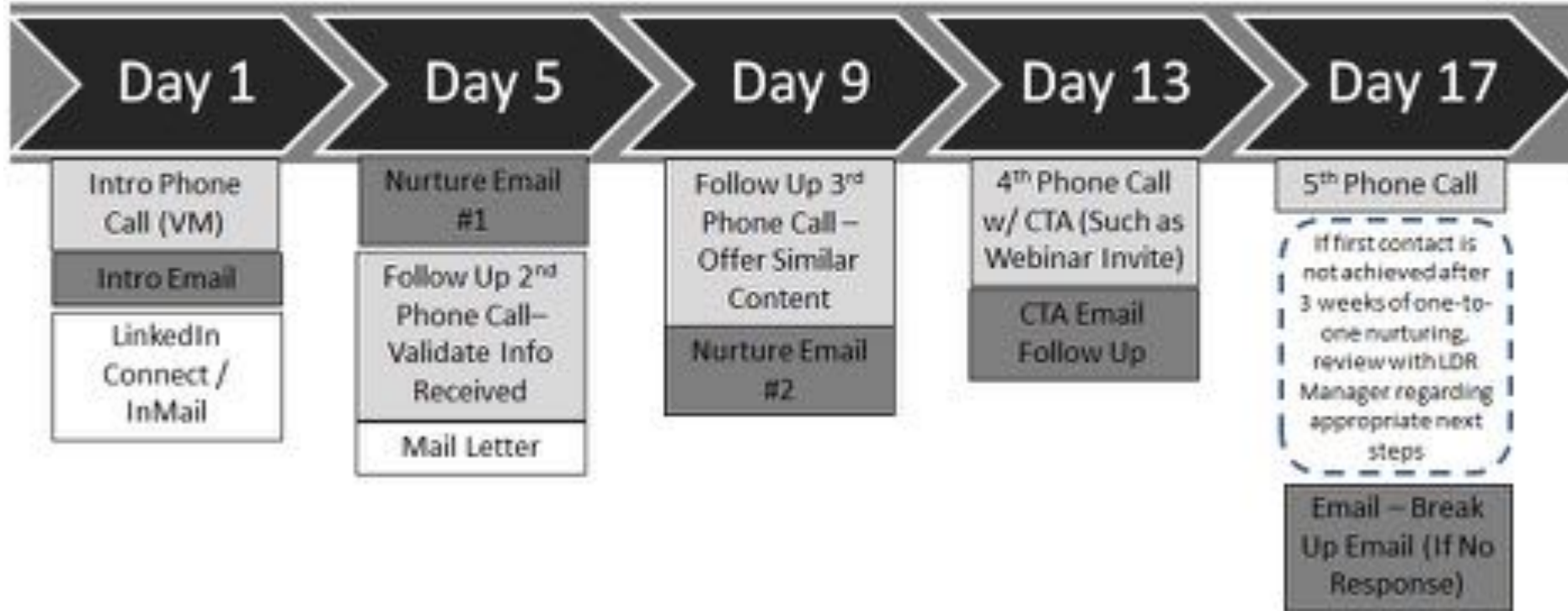
Inside Sales Demand Generation Research



Over 30% of leads are never contacted at all. By just making a few more call attempts, reps will experience 70% more contact!

Disciplined Prospecting Aligned with Stage of Buyer Journey

Example Prospecting Cadence



The Sales SLA

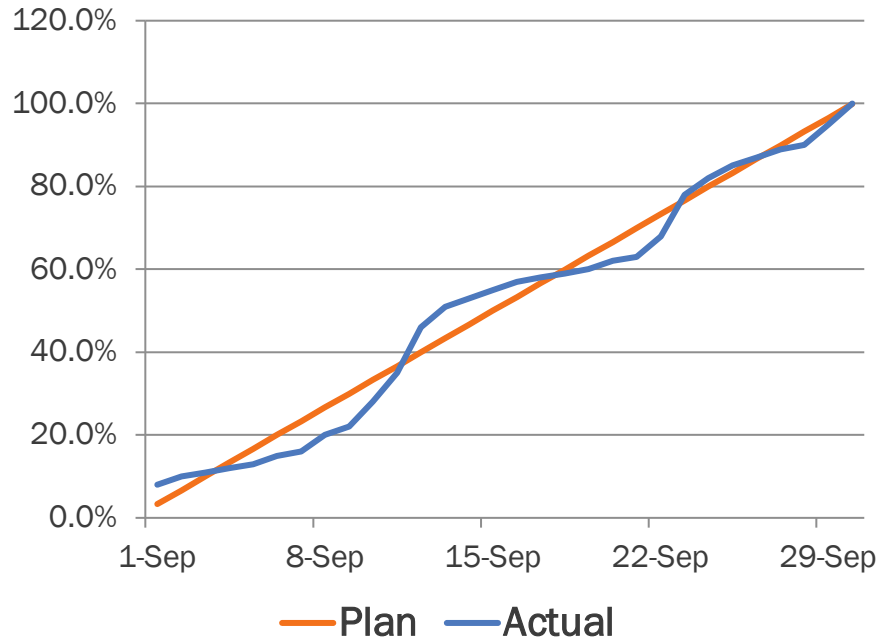
Sales SLA Criteria

1. Contact new leads < 2 hours
2. Contact leads > 3 times within 7 days
3. Contact leads > 6 times within 21 days
4. Close Sales Opps in < 6 months

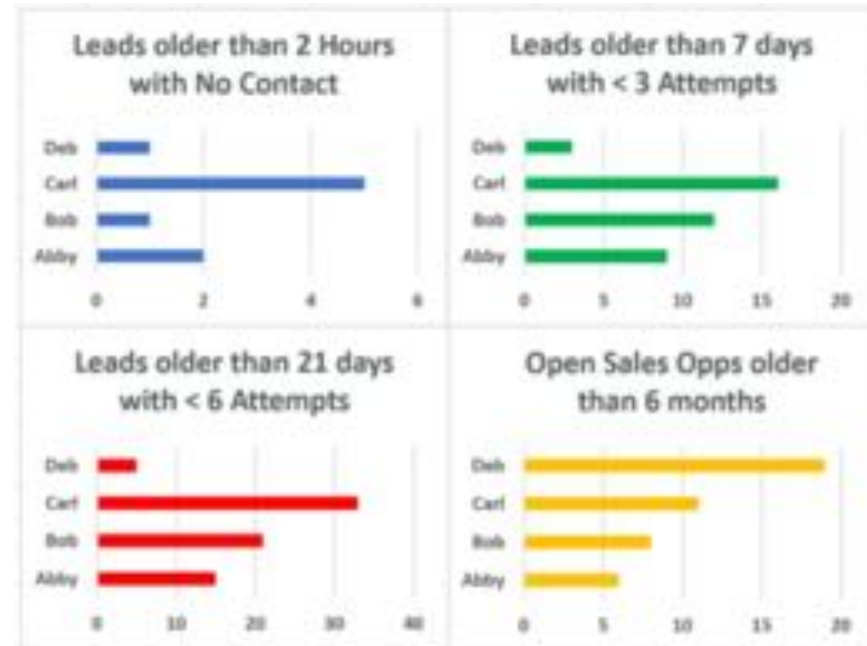


Monitor Sales Activity and Marketing Daily

Marketing SLA Status



Sales SLA Status



Demand Generation Case Study

The screenshot shows the website interface for ICT Sviluppo - Digital Think. The header includes the company logo and contact information. The main content area features an article titled "6 essential functions of Shopify Plus" by Steve Campbell, a Shopify Expert. The article text is partially visible, starting with "Shopify Plus offers security for your every single e-commerce store. If you really want to understand Shopify Plus, you need to live in the world of e-commerce to get together an article that your e-commerce manager can relate to."

Conclusion

As you can see above, there are a number of reasons to consider upgrading to Shopify Plus that would encourage any developer to manage your website. In addition to these, apps and features are a number of other benefits that any e-commerce manager might find equally appealing. These include integrated integration with Avalara, managing taxation, 3 additional "clone shops" to meet the growth needs of an international e-commerce company and a dedicated account manager directly within Shopify to help give priority to support requests, answer platform questions and provide early access to the Shopify product roadmap. If you are a growing e-commerce company that needs a solid platform to manage sales and operations, consider [getting in touch with Shopify Plus](#) to discuss how an upgrade or migration can take your business to the next level.

WATCH THE FREE WEBINAR
FIND OUT HOW SHOPIFY PLUS WORKS!

Don't forget to share this article!



Old School Sales Prospecting



#1

“Hi Michelle. This is Dwight from ICT. We specialize in creating ready-to-sell e-commerce websites for your business using the modern Shopify platform. Are you free at 1 PM tomorrow to discuss?”

5/27 at 3 PM

Old School Sales Prospecting



Voicecall #1: 5/27 at 3 PM

“Hi Michelle. This is Dwight from ICT. We specialize in creating ready-to-sell e-commerce websites for your business using the modern Shopify platform. Are you free at 1 PM tomorrow to discuss?”

#2

“Hi Michelle. This is Dwight from ICT. We specialize in creating ready-to-sell e-commerce websites for your business using the modern Shopify platform. Are you free at 1 PM tomorrow to discuss?”

5/29 at 2 PM

Old School Sales Prospecting



Voicemail #1: 5/27 at 3 PM

“Hi Michelle. This is Dwight from ICT. We specialize in creating ready-to-sell e-commerce websites for your business using the modern Shopify platform. Are you free at 1 PM tomorrow to discuss?”

Voicemail #2: 5/29 at 2 PM

“Hi Michelle. This is Dwight from ICT. We specialize in creating ready-to-sell e-commerce websites for your business using the modern Shopify platform. Are you free at 1 PM tomorrow to discuss?”

#3

“Hi Michelle. This is Dwight from ICT. We specialize in creating ready-to-sell e-commerce websites for your business using the modern Shopify platform. Are you free at 1 PM tomorrow to discuss?”

6/1 at 4 PM

Old School Sales Prospecting



Voicemail #1: 5/27 at 3 PM

“Hi Michelle. This is Dwight from ICT. We specialize in creating ready-to-sell e-commerce websites for your business using the modern Shopify platform. Are you free at 1 PM tomorrow to discuss?”

Voicemail #2: 5/29 at 2 PM

“Hi Michelle. This is Dwight from ICT. We specialize in creating ready-to-sell e-commerce websites for your business using the modern Shopify platform. Are you free at 1 PM tomorrow to discuss?”

Voicemail #3: 6/1 at 4 PM

“Hi Michelle. This is Dwight from ICT. We specialize in creating ready-to-sell e-commerce websites for your business using the modern Shopify platform. Are you free at 1 PM tomorrow to discuss?”

#4

“Hi Michelle. This is Dwight from ICT. We specialize in creating ready-to-sell e-commerce websites for your business using the modern Shopify platform. Are you free at 1 PM tomorrow to discuss?”

6/4 at 3 PM

Modern Sales Prospecting

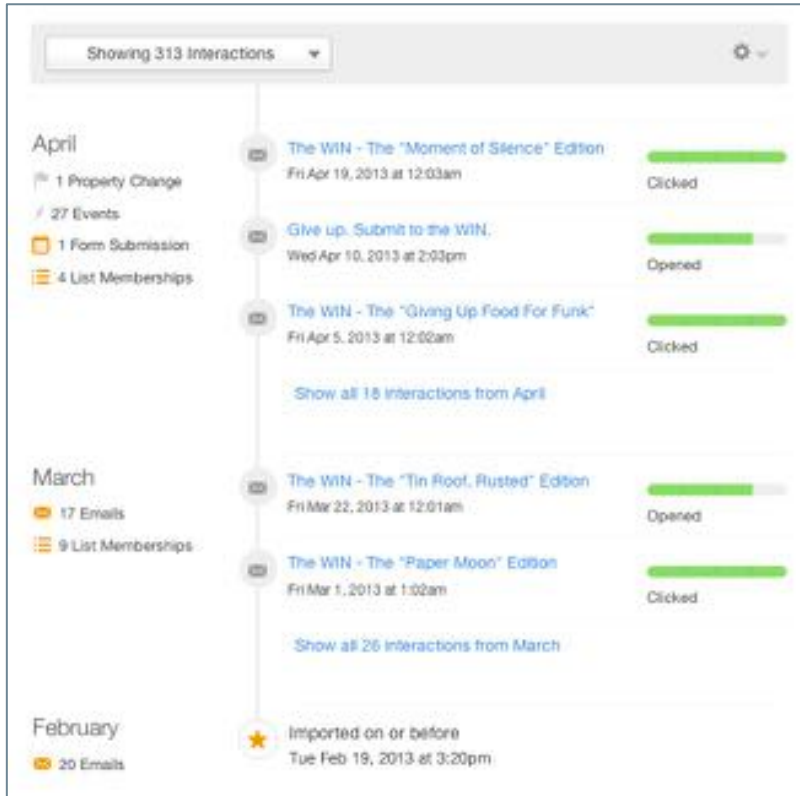
Step #1: Research Contact Background and Company



A screenshot of a LinkedIn profile for Michelle Palleschi. The profile header shows the LinkedIn logo, a search bar, and navigation icons for Home, My Network, Jobs, and Messaging. Below the header is a banner image featuring the San Francisco skyline and the Sendoso logo. The profile picture is a circular portrait of Michelle Palleschi. Her name is listed as Michelle Palleschi, with a 2nd degree connection. Her current position is COO at Sendoso, and she is located in the San Francisco Bay Area. To the right of the profile information, there are icons for Sendoso, Saint Mary's College of California, a contact info icon, and a connections icon showing 500+ connections. At the bottom of the profile, there are three buttons: Connect, Message, and More...

Modern Sales Prospecting

Step #2: Review Lead's Interactions with Company



360 Degree View of Calls, Emails, Website Visits, Social Media Interactions, etc., with Your Company

Modern Sales Prospecting

Step #3: Follow up with personalized, helpful messages



#1

“Hi Michelle. This is Ryan from ICT. I noticed you attended our webinar this morning on ShopifyPlus. I took a look at your company’s current eCommerce website and had a few quick ideas on how to improve the site’s conversion. I will email them to you now. Let me if you would like to go over them.”

5/27 at 11 AM

Modern Sales Prospecting

Step #3: Personalize Outreach to Lead Context.



Voicemail #1 5/27 at 11 AM

“Hi Michelle. This is Ryan from ICT. I noticed you attended our webinar this morning on ShopifyPlus. I took a look at your company’s current eCommerce website and had a few quick ideas on how to improve the site’s conversion. I will email them to you now. Let me if you would like to go over them.”

#2

“Hi Michelle. This is Ryan from ICT. I found a case study of one of our customers in your industry that decreased their cart abandonment rate using Shopify Plus. I will email you the case study and am happy to walk you through their process when you have a moment.”

5/29 at 6 PM

Modern Sales Prospecting: Use CONTEXT



5/27 at 11 AM

“Hi Michelle. This is Ryan from ICT. I noticed you attended our webinar this morning on ShopifyPlus. I took a look at your company’s current eCommerce website and had a few quick ideas on how to improve the site’s conversion. I will email them to you now. Let me if you would like to go over them.”

5/29 at 6 PM

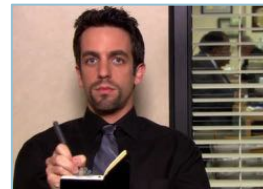
“Hi Michelle. This is Ryan from ICT. I found a case study of one of our customers in your industry that decreased their cart abandonment rate using Shopify Plus. I will email you the case study and am happy to walk you through their process when you have a moment.”

#3

“Hi Michelle. This is Ryan from ICT. Since you were interested in the Shopify Plus webinar, I though you might also be interested in this webinar on examples of well-designed eCommerce sites. I am happy to point out which aspects of each example is most applicable to your website.”

6/1 at 12 PM

Modern Sales Prospecting: Use CONTEXT



5/27 at 11 AM

“Hi Michelle. This is Ryan from ICT. I noticed you attended our webinar this morning on ShopifyPlus. I took a look at your company’s current eCommerce website and had a few quick ideas on how to improve the site’s conversion. I will email them to you now. Let me if you would like to go over them.”

5/29 at 6 PM

“Hi Michelle. This is Ryan from ICT. I found a case study of one of our customers in your industry that decreased their cart abandonment rate using Shopify Plus. I will email you the case study and am happy to walk you through their process when you have a moment.”

6/1 at 12 PM

“Hi Michelle. This is Ryan from ICT. Since you were interested in the Shopify Plus webinar, I thought you might also be interested in this webinar on examples of well-designed eCommerce sites. I am happy to point out which aspects of each example is most applicable to your website.”

#4

“Hi Michelle. This is Ryan from ICT. I have not heard back from you so I am going to assume that increasing the effectiveness of your eCommerce website is no longer a priority. Call me anytime if things change.”

6/4 at 10 AM

Defining the Decision-Making Unit (DMU)



Source: HBS RC Marketing Wrap

The Most Common Reason Why Sales People Lose Deals:

By not identifying the people involved, their roles and their personal and professional objectives as it relates to this Single Sales Objectives is one of the major reasons why sales people lose deals.

Generic Buyer Personas in the Decision-Making Unit

Buyer Persona	Role in Decision-Making Unit	General Tendencies
---------------	------------------------------	--------------------

PERSONAS



CEO



Warehouse
Manager



VP Supply
Chain



Director
IT

JOURNEY STAGES



Example Buyer Journey and Sales Playbook for Complex Sales

PARTICIPATION LEVEL



Active - Stake the process at this stage



Involved - Stakeholder takes part in activities but does not direct the process at this stage



Approved - Manager's approval is needed to pass the stage



Not Involved - Stakeholder is not a participant at this stage



TYPICAL BUYER NEEDS AT THIS STAGE:

- Business and Financial Justification
- Solution Requirements/Solution Benefits
- Solution Unique Value Proposition/ Solution Comparison
- Vendor Viability
- Relevant Vendor Experience

Participation Level

Participant



CEO

Driver



Warehouse Manager

Driver



VP Supply Chain

Gatekeeper



Director IT

Needs



I need to write an ROI case for the CFO. This includes how the increase in the efficiency and accuracy of managing and fulfilling orders with a new solution enhances customer relationships for better brand loyalty, and cuts internal costs associated with inaccuracies, labor management, and IT downtime.



I need to be sure the solution has the capabilities necessary to solving my problem, which is improving the efficiency and accuracy of fulfilling direct-to-store and direct-to-consumer orders, and quickly adapting to changing warehouse demands and systems.



I need to understand the cost of the solution.

Activities



Request and view demos to gain a better understanding of ease of use, alignment to my issues, and capabilities highlighted in the data sheets.



Research vendors, contact vendors to learn more about capabilities and benefits, and score vendors based on their expertise, alignment to my issue, and cost.



Develop solution requirements/buying criteria and draft RFP



TYPICAL BUYER NEEDS AT THIS STAGE:

- Finance and IT Buy-in
- Pricing Options and TCO
- Vendor Viability
- Solution Fit
- Vendor Solution Proof Points (case studies, references, pilots)
- Cross-Functional Alignment

Participation Level

Gatekeeper



CEO

Driver



Warehouse Manager

Driver



VP Supply Chain

Gatekeeper



Director IT

Needs



I need to see the software in action for my business and my users.



I need final solution signoff from the CFO.



I need final approval from IT that the solution will work within our infrastructure.



I need a TCO calculation.

Activities



Speak with analysts for insights into solution capabilities, benefits, and risks, and for vendor validation.



Compare functionality at an in-depth level.



Meet the vendor teams and run trials with the top 3 considered solutions.



Review case studies and speak with customer references.



Develop solution short list. Remove options that are not a fit in terms of capabilities, benefits, and cost, do not provide significant ROI quickly enough, or do not have experience working with customers like us.

Buyer Persona / Buyer Journey Matrix



		Awareness Stage	Consideration Stage	Decision Stage
Buyer Persona 1 	Content Offers We Have:	?	?	?
	Content Offers We Need:			
Buyer Persona 2 	Content Offers We Have:	?	?	?
	Content Offers We Need:			

Buyer Persona / Buyer Journey Matrix



		Awareness Stage	Consideration Stage	Decision Stage	
Buyer Persona 1 	Content Offers We Have:	5 offers	3 offers	2 offers	10 offers
	Content Offers We Need:	✓ Nothing to do here!	✓ Nothing to do here!	✓ Nothing to do here!	
Buyer Persona 2 	Content Offers We Have:	0 offers	0 offers	1 offer	1 offer
	Content Offers We Need:	Repurpose 2-3 Awareness Stage Content Offers from Persona 1	Repurpose 1-2 Consideration Stage Content Offers from Persona 1	✓ Nothing to do here!	

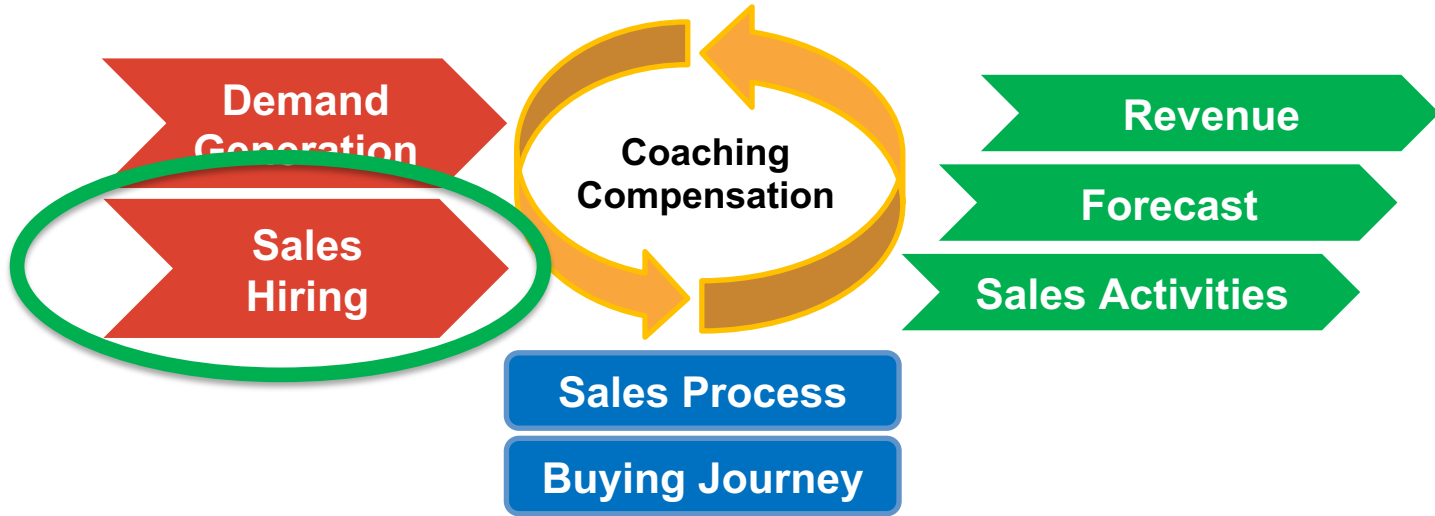
Topic / Buyer Journey Matrix



		Awareness Stage	Consideration Stage	Decision Stage
Topic 1 	Content Offers We Have:	12 offers	7 offers	5 offers
	Content Offers We Need:	✓ Nothing to do here!	✓ Nothing to do here!	✓ Nothing to do here!
Topic 2 	Content Offers We Have:	0 offers	0 offers	1 offers
	Content Offers We Need:	Build up library of Content Offers in all 3 Buyer's Journey Stages for Topic #2		

GTM System Design

Sales Hiring





***What do you look
for in a sales hire?***

*The ideal sales hiring formula is
different for every company...*

GTM Context Consists of Buyer, Product, and Company Components



PRODUCT CONTEXT

- Complexity
- Price
- Category Maturity
- Product Maturity
- Onboarding requirements
- Competitive Landscape



BUYER CONTEXT

- Role(s)
- Industry
- Buyer Journey
- Local Culture



COMPANY CONTEXT

- Strategy
- Stage of Venture
- Culture

*The ideal sales hiring formula is
different for every company...*

*but there is a process to
engineer your formula.*

Sales Candidate Assessment

CANDIDATE SUMMARY

Candidate Name:	John Doe
Date of Interview:	5/5/2012
Interviewer:	Jennifer Maxwell
Primary Criteria Score:	71%
Summary of Strengths:	Smart Strengths
Summary of Weaknesses:	Smart Weaknesses
Next Step Recommendation:	Smart Recommended Next Steps

Primary Criteria	Score	Weight	Weighted Score	Max Score	Comments
Coachability	8	9	72	90	
Curiosity	9	9	81	90	
Work Ethic	7	8	56	80	
Intelligence	9	8	72	80	
Prior Success	4	7	28	70	
Precision	8	5	40	50	
Preparation	8	3	24	30	
Adaptability to Change	7	3	21	30	
Competitiveness	8	3	24	30	
Brevity	6	3	18	30	
TOTAL			412	580	
				71%	

Sales Candidate Assessment

CANDIDATE SUMMARY

Candidate Name:
 Date of Interview:
 Interviewer:
 Primary Criteria Score:
 Summary of Strengths:
 Summary of Weaknesses:
 Next Step Recommendation:

[Definition] Proactive desire for feedback. Ability to absorb and apply feedback. Improvements are sustained for the long term.

[Scoring]

- [8 - 10] Eager to learn and proactive in seeking mentorship. Accepts constructive criticism graciously and appreciatively. Shows immediate improvement after receiving coaching during role plays. Had specific examples of internalizing and acting on feedback.
- [5 - 7] Handles constructive criticism well but would not proactively seek it out. Shows some improvement after receiving coaching during role plays. Had some examples of internalizing and acting on feedback.
- [1 - 4] Appears stubborn and defensive when receiving feedback. Shows little or no improvement after receiving coaching during role plays. Struggled to find examples of internalizing and acting on feedback.

Primary Criteria

Primary Criteria	Score	Weight
Coachability	8	1
Curiosity	6	1
Work Ethic	7	1
Intelligence	6	1
Prior Success	4	1
Precision	8	1
Preparation	8	1
Adaptability to Change	7	1
Competitiveness	8	1
Brevity	6	1
TOTAL		

15	30
24	30
18	30
42	100
	75%

Sales Candidate Assessment

CANDIDATE SUMMARY

Candidate Name:
 Date of Interview:
 Interviewer:
 Primary Criteria Score:
 Summary of Strengths:
 Summary of Weaknesses:
 Next Step Recommendation:

i. [Definition] Naturally ask inquisitive questions. Listens and drills in with strong follow on questions. Sounds genuine in delivery and interest in the responses.

Primary Criteria

Primary Criteria	Score	Weight
Coachability	8	1
Curiosity	9	1
Work Ethic	7	1
Intelligence	9	1
Prior Success	4	1
Person	8	5
Preparation	8	3
Adaptability to Change	7	3
Competitiveness	8	3
Brevity	6	3
TOTAL		

ii. [Scoring]

- [8 - 10] In role plays and natural conversation without guidance, led with questions, sounded sincere, and followed up with a tailored question to explore the answer deeper. Potentially re-framed perspective through the questions asked.
- [5 - 7] Started role play with 3 or 4 questions. Questions were open-ended and built on each other. However, the questioning was more scripted and did not explore the depth of the buyer's perspective.
- [1 - 4] Leads with product information at the beginning of the role play or asked basic, non-sequential questions such as why they were interested, whether they were the decision maker, and whether this was a priority.

15	30
24	30
18	30
42	180
	75%

Sales Candidate Assessment

CANDIDATE SUMMARY

Candidate Name:
 Date of Interview:
 Interviewer:
 Primary Criteria Score:
 Summary of Strengths:
 Summary of Weaknesses:
 Next Step Recommendation:

i. [Definition] Ability to absorb complex concepts quickly and articulate concepts back. Communication style that exhibits a high degree of intelligence.

PRIMARY CRITERIA

Criteria	Score	Weight	Weighted Score
Coachability	8	5	40
Curiosity	9	5	45
Work Ethic	7	5	35
Intelligence	9	5	45
Prior Success	4	5	20
Precision	8	5	40
Preparation	8	3	24
Adaptability to Change	7	3	21
Competitiveness	8	3	24
Brevity	6	3	18
TOTAL			422

[Scoring]
 1. 8 - 10: Recalls over 70% of new concepts introduced to them for the first time. Vocabulary and articulation in their communication style is excellent. The candidate sounds really smart.
 2. 5 - 7: Recalls over 50% of new concepts introduced to them for the first time. Vocabulary and articulation in their communication style is above average.
 3. 1 - 4: Recalls less than 50% of new concepts introduced to them for the first time. Vocabulary and articulation in their communication style is average or lower. The candidate does not sound smart.

11 30
 24 30
 18 30
422 180
72%

Sales Candidate Assessment

CANDIDATE SUMMARY

Candidate Name: John Doe
 Date of Interview: 6/5/2012
 Interviewer: Jonathan Johnson
 Primary Criteria Score: 82
 Summary of Strengths:
 Summary of Weaknesses:
 Next Step Recommendation:

[Definition] Top performer in past sales environments, as defined by rank among peers

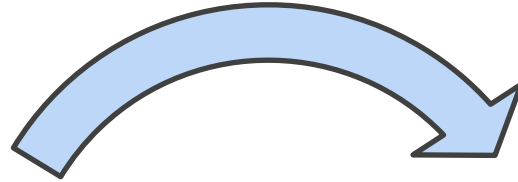
[Scoring]

1. 10 - Top 1% of peers
2. 9 - Top 2% of peers
3. 8 - Top 5% of peers
4. 7 - Top 10% of peers
5. 6 - Top 15% of peers
6. 5 - Top 20% of peers
7. 4 - Top 30% of peers
8. 3 - Top 40% of peers
9. 2 - Top 50% of peers
10. 1 - Bottom 50% of peers

PRIMARY CRITERIA

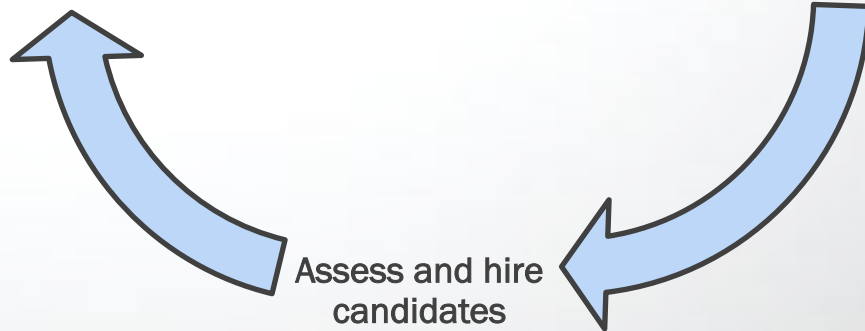
Primary Criteria	Score	Weight	Comments
Coachability	8	5	
Curiosity	9	5	
Work Ethic	7	5	
Intelligence	9	5	
Prior Success	8	5	
Precision	8	5	
Preparation	8	3	
Adaptability to Change	7	3	
Competitiveness	8	3	
Brevity	6	3	
TOTAL			
		110	30
		14	30
		18	30
		422	180
			71%

Test/Iterate/Learn to define your sales hiring formula



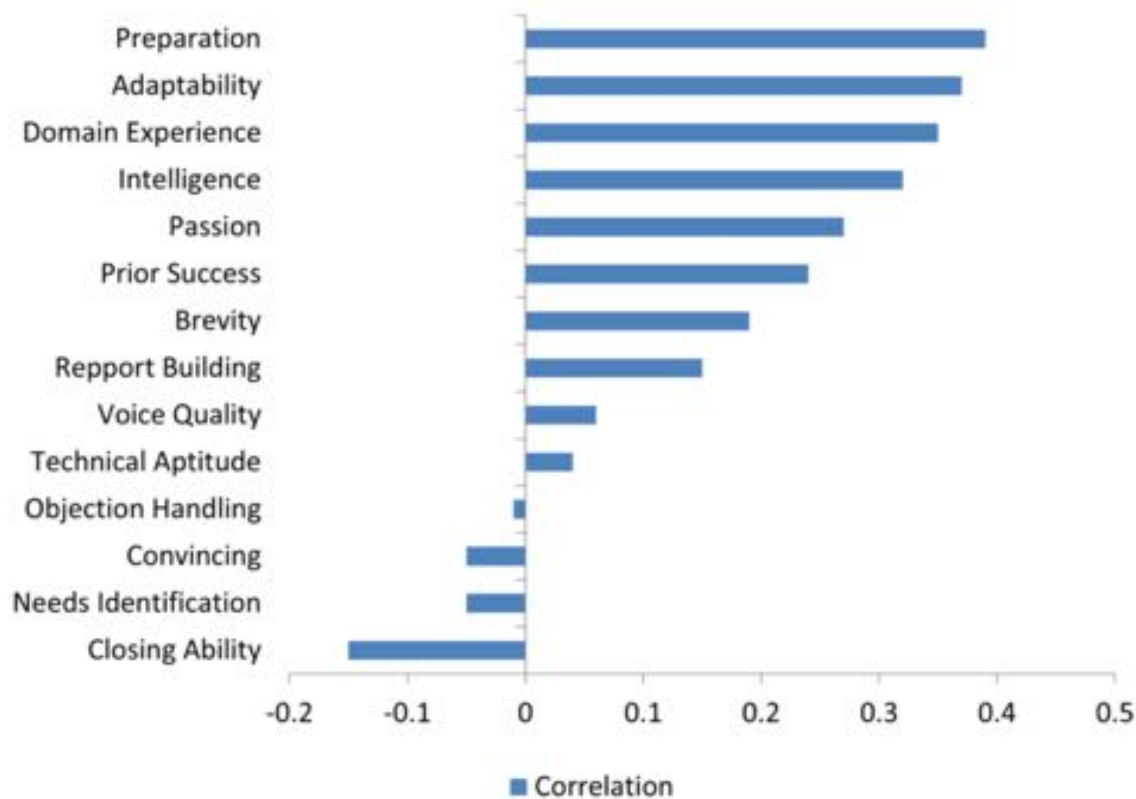
6 months post-hire, reflect on why the hire is great (or poor)

Assess hiring manager performance. Iterate sales hiring formula



Assess and hire candidates against formula

Engineer Your Own Sales Hiring Formula



OMG Analysis of Top Performing Salespeople

THE DATA BEHIND THE SCIENCE OF SALES FORCE SELECTION

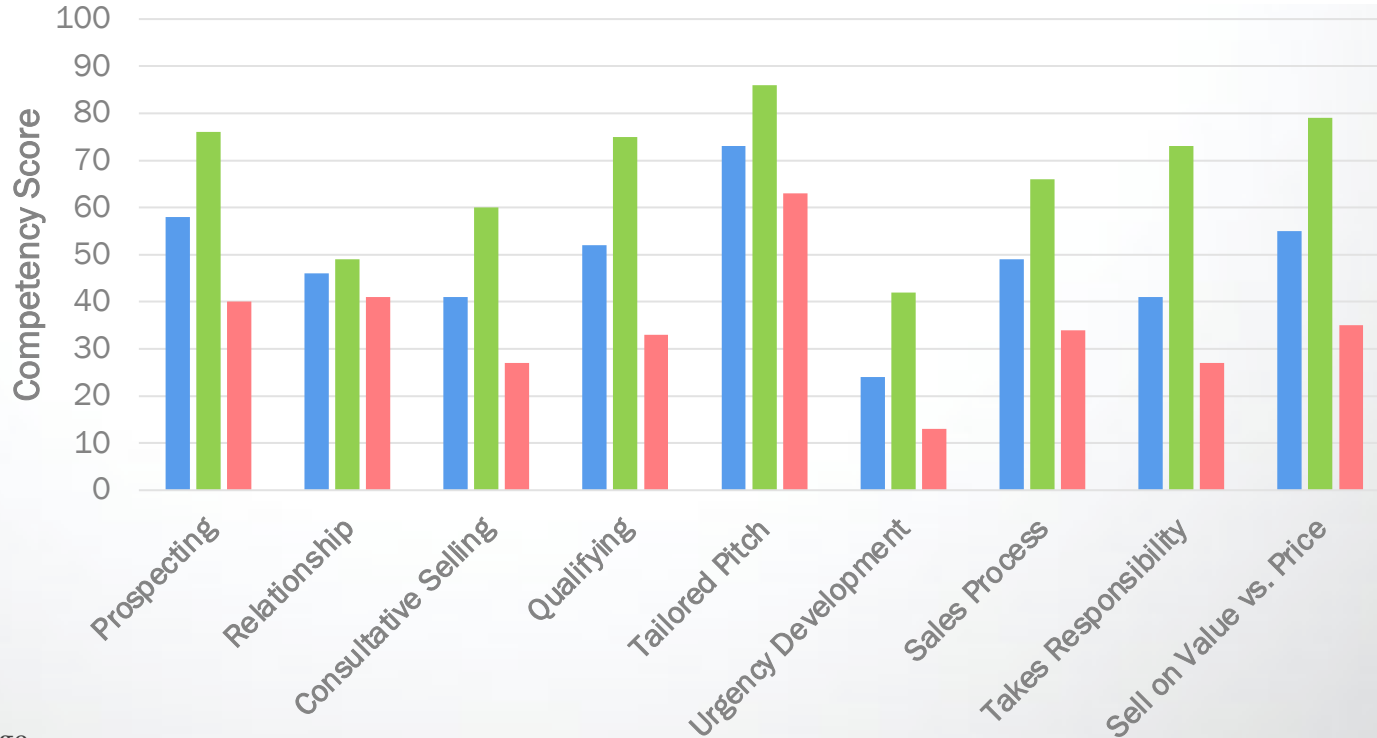
28,727
COMPANIES

81,372
HIRES

1,899,407
SALESPEOPLE

200
INDUSTRIES

126
COUNTRIES



Pothole Alert!

Overweighing education, experience, and job knowledge



Stephen L. Gurn is a Managing Partner of PSP Metrics, Inc., Pittsburgh, Pennsylvania, USA.

Predicting successful people is a difficult task: there is no silver bullet for making the job easier. It is a complex decision with many dynamic variables to get right. Based on the experience of our industrial psychologists over the last 65 years, we have identified the factors least likely to predict success:

- Job knowledge and experience.
- Knowing the "right people".
- Having the "right education".
- Saying all the "right" things in the interview.



Which criteria scored highest for us?

INTELLIGENT

or

COACHABLE

or

CURIOUS

The HubSpot Sales Hiring Formula

- Coach-ability
- Curiosity
- Intelligence
- Work Ethic
- Prior Success



My Sales Interview Process



- [Interview starts in the lobby. Let the candidate lead.]
 - Does the candidate break the ice?
 - Did the candidate do any research on me?
 - Does the candidate execute a genuine, natural set of questions about me, my weekend, the company, etc.?
- Why are you interested in working at this company? Where do you hope to be in your career in 5 years?
 - [Easy questions to warm the candidate up. Well articulated career goals never hurt.]
- I see you are an account executive at [insert their company]. How many account executives are there? What was your rank? Is that based on bookings or revenue? Is it based on the year or the quarter?
 - [Assess “Prior Success”. Top 5% is strong. Top 25% is the bar. If the candidate is not in the top 25%, the candidate must be very strong in other areas.]
- What was it about your approach that allowed you to achieve such a high rank? Why weren't you #1?
 - Understand their perception of their strengths.
 - Beware of external excuse making for the second question (i.e. bad manager, bad territory, bad product). A strong self critique is preferable.

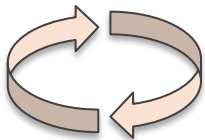
My Sales Interview Process (cont.)

- Let's do a role play. I will play the VP of Marketing at a small security software company. You will play a salesperson at HubSpot. Let's assume I downloaded a whitepaper from your website on Inbound Marketing, leaving my email and phone number, and this lead was provided to you this morning for follow up.
 - Test whether sales candidate has a naturally curious sales approach.
 - Observe how the salesperson starts. A 10 minute pre-amble on their background and company is not good (show up and throw up).
 - A series of thoughtful questions about the prospect's goals in downloading the white paper is good
- During the role play, ask a challenging question about how SEO or inbound marketing works?
 - Tests candidate's preparation and learning curve
- [Stop the role play] How did you do?
 - "Excellent" is not a great response.
 - A detailed analysis of what the candidate did well and could have improved on shows humility and the openness to coaching.
- In every interview, I provide candidates with one strength and one area of improvement. [Deliver coaching]
 - Tests openness to absorb coaching.
- [Repeat the role play]
 - Tests ability to apply coaching.

Quantifying the Salesperson's Journey

Hiring

Step #5: Iterate scorecard and methodology



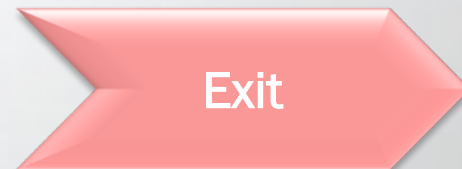
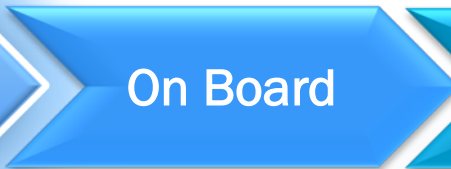
Step #4: At 6 month employee anniversary, compare scorecard to goal attainment. Assess hiring managers on interview performance.

Step #2: Develop interview scorecard

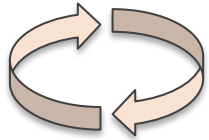


Step #1: Quantify goals for each role

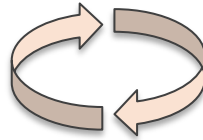
Step #3: Develop interview methodology



Quantifying the Salesperson's Journey On Boarding



Opportunity to assess hiring manager and hiring formula performance after 30-day training



Opportunity to assess training program by correlating training score to 6-month salesperson performance

Interview Scorecard

Interview Methodology

Training Exams and Skill Assessments

Training Program

Salesperson performance

Hire

On Board

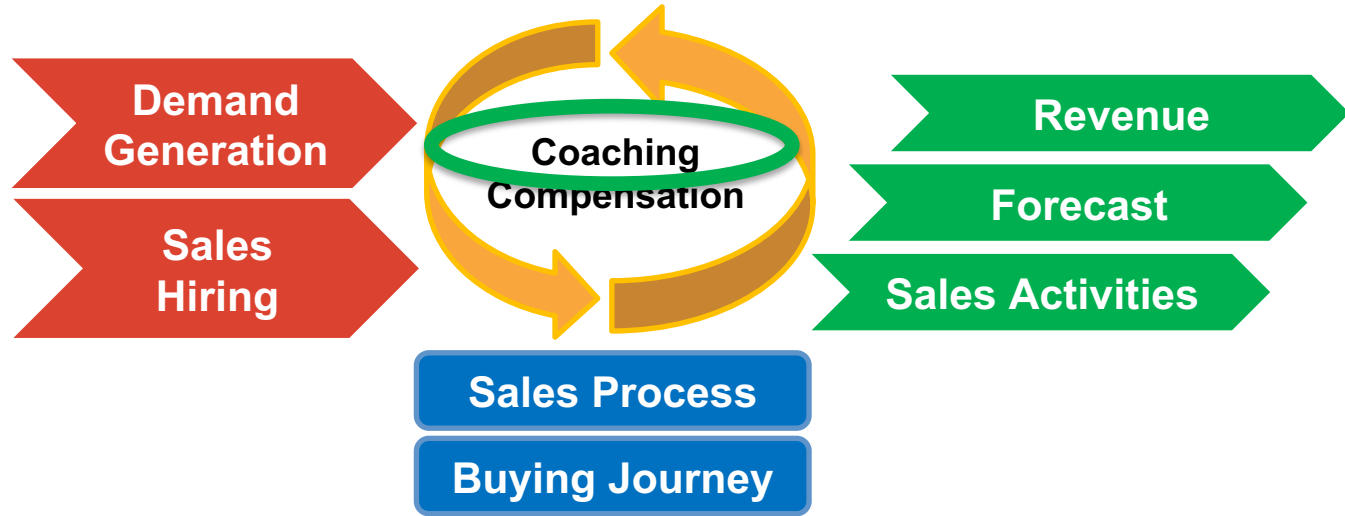
Develop

Promote

Exit

GTM System Design

Coaching





Coaching: Golf vs. Sales

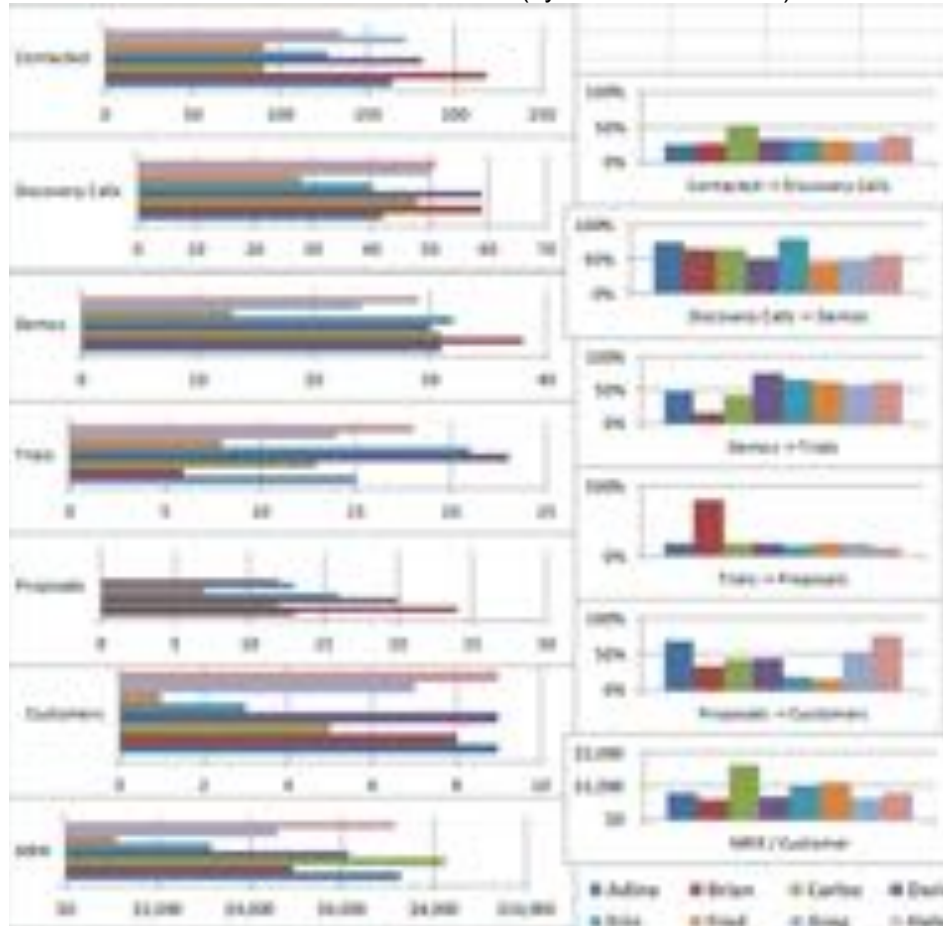
“Data-Driven Sales Coaching”

Use data to diagnose the skill deficiency.

Customize a coaching plan.

Enabling Data-Driven Sales Coaching

Exhibit 3 - June Performance (by Account Executive)



Co-Creating the Skill/Development Plan

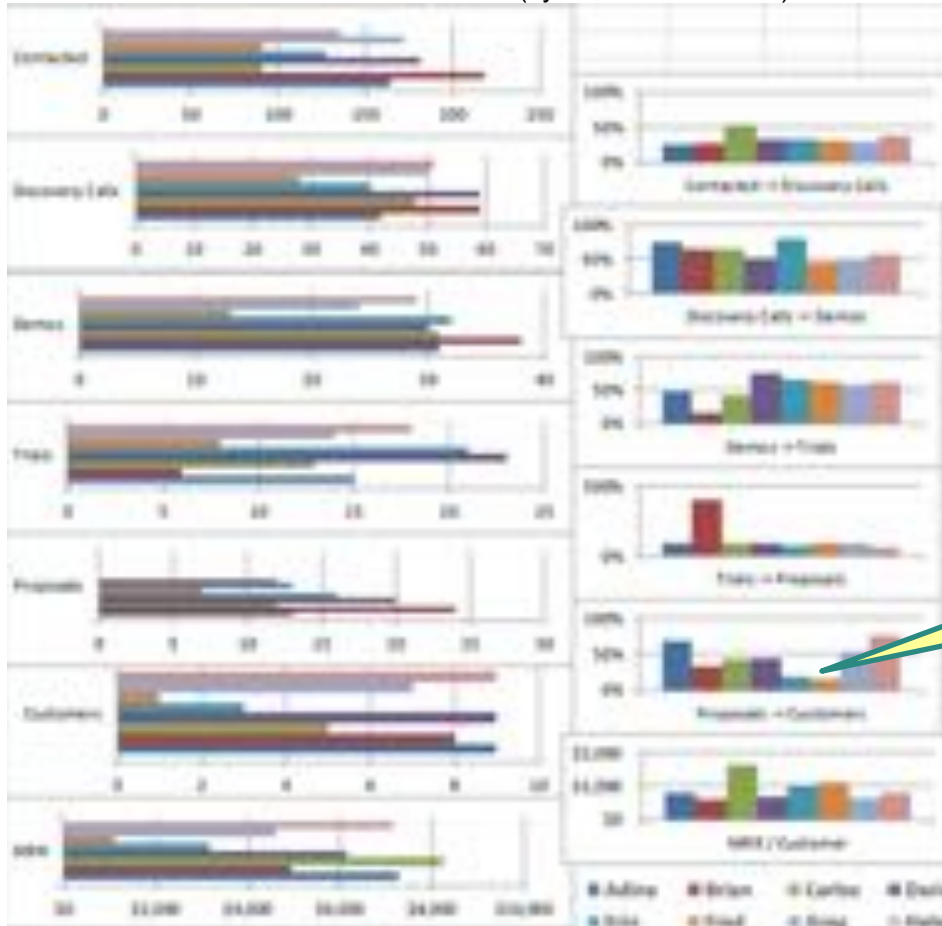
ONE-ON-ONE AGENDA

1. Self assess qualitative performance
2. Self assess quantitative performance
3. Agree on a skill to work on – prefer one
4. Co-create a development plan
5. Schedule the plan



Example causes of Closing issues

Exhibit 3 - June Performance (by Account Executive)



Causes of Close Rate Issues

- Developing sense of urgency
- Getting beyond surface pain
- Reaching the authority

Example Coaching Playbook: Closing Issues



DIAGNOSIS	COACHING PLAN	METRICS GOAL
Developing Sense of Urgency	Pre-call planning and post mortem reviews on urgency	Discovery-call-to-customer % > 20%
Getting beyond surface pain	Film review of discovery calls	Discovery-call-to-customer % > 20%
Getting to power	Pre-call planning and post mortem reviews on getting to power	VP/C-Level interactions at 6 new accounts per month

Implementing a sales coaching culture



1st Day of Month

2nd Day of Month

Morning

Sales Person / Manager Independent Reviews

- Think through qualitative performance
- Review individual metrics
- Think about Skill/Development Plan

Director Meets with Manager

- Review Skill/Development Plans for each sales person

Afternoon

Manager Meets with Sales Person

- Discuss qualitative performance
- Review individual metrics
- Co-Create Skill/Development Plan

VP Meets with Director

- Review Skill/Development Plans for each sales person



Example monthly coaching plan

REP	DIAGNOSIS	COACHING PLAN	METRICS GOAL
Brian	Over-investment in unqualified opportunities	Weekly opportunity review of BANT post discovery call.	Demo-to-Customer ratio > 30%
Erin	Developing Sense of Urgency	Pre-call planning and post mortem reviews on urgency	Discovery-call-to-customer % > 15%
Fred	Time management issues	Place 2 hours of prospecting into daily calendar. Send daily email to manager of new leads contacted and appointments set.	Average 10+ new appointments per week
Carlos	Lack of personal goals	Personal conversation on financial goals. Map to daily activity.	Average 10+ new appointments per week

Hold team, especially management, accountable to coaching progress



June Coaching Plans



July Coaching Plans



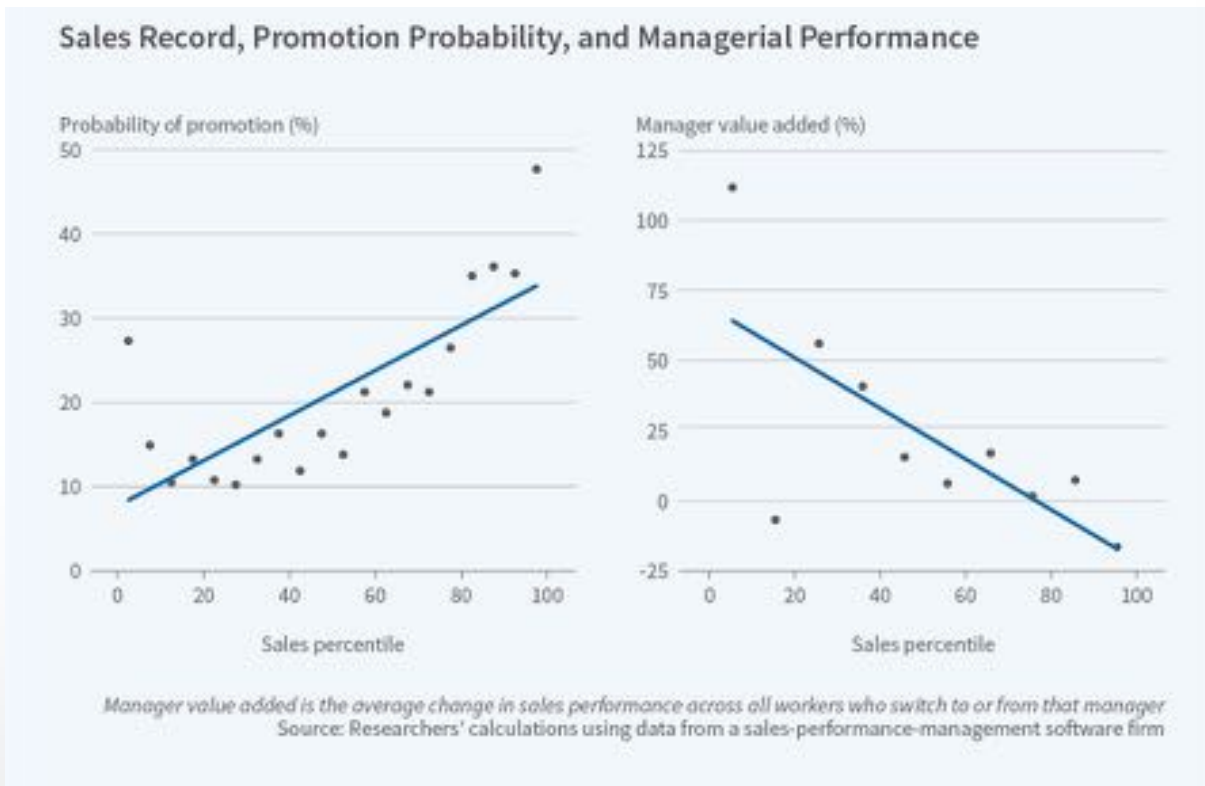
August Coaching Plans

REP	DIAGNOSIS	COACHING PLAN	METRICS GOAL
Brian	Over-investment in unqualified opportunities	Weekly opportunity review of BANT post discovery call.	Demo-to-Customer ratio > 30%
Erin	Developing Sense of Urgency	Pre-call planning and post mortem reviews on urgency	Discovery call-to-customer % > 30%
Fred	Time management issues	Place 2 hours of prospecting into daily calendar. Send daily email to manager of new leads contacted and appointments set.	Average 5+ new appointments per week
Carols	Lack of personal goals	Personal conversation on financial goals. Map to daily activity.	Average 5+ new appointments per week

REP	DIAGNOSIS	COACHING PLAN	METRICS GOAL
Brian	Over-investment in unqualified opportunities	Weekly opportunity review of BANT post discovery call.	Demo-to-Customer ratio > 30%
Erin	Developing Sense of Urgency	Pre-call planning and post mortem reviews on urgency	Discovery call-to-customer % > 30%
Fred	Time management issues	Place 2 hours of prospecting into daily calendar. Send daily email to manager of new leads contacted and appointments set.	Average 5+ new appointments per week
Carols	Lack of personal goals	Personal conversation on financial goals. Map to daily activity.	Average 5+ new appointments per week

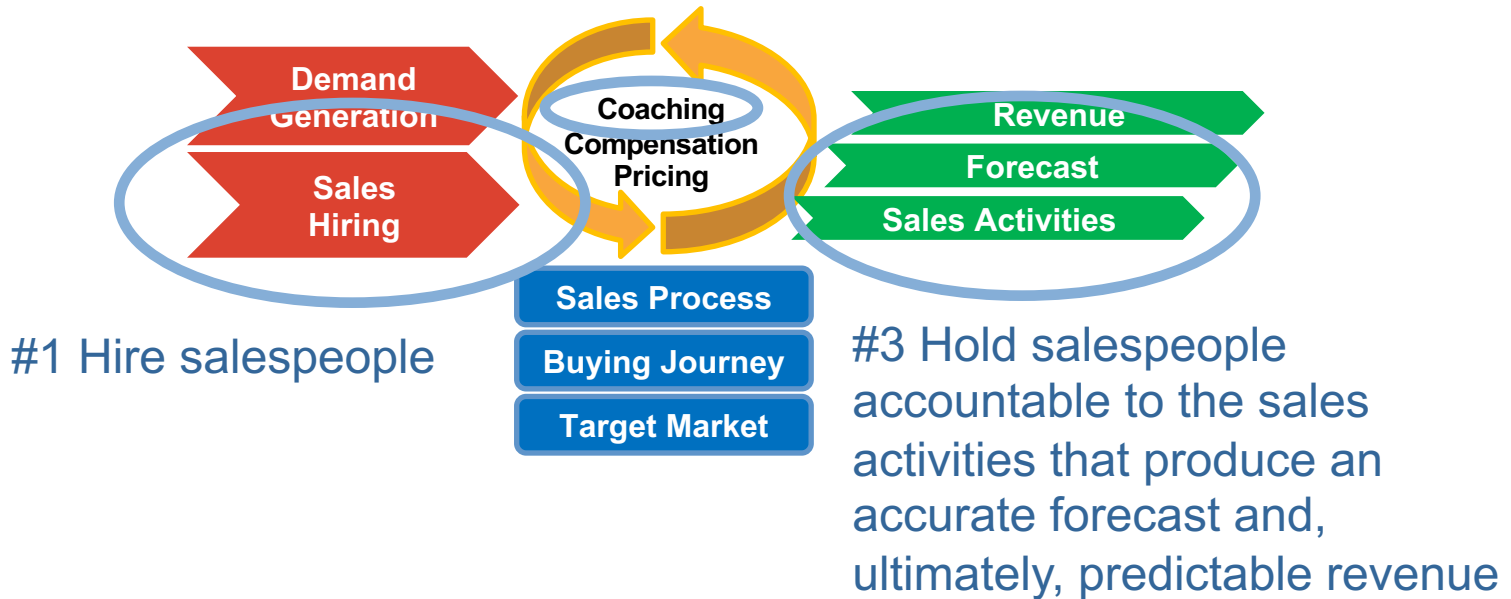
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Pothole: Assuming Your Top Salesperson will be a Good Sales Manager



The Role of the Sales Manager

#2 Coach salespeople to the sales playbook





Is this data-driven sales management approach applicable to a company selling higher priced products?



JOE VASTINE

Global Sales Operations Manager, Omnitrac

Data-Driven Sales Management Case Study



- Fleet management system for trucking industry
- 1,000 Employees
- 6-digit deal size
- 12,000 customers across 70 countries

Problem

- Incomplete sales opportunity data from salespeople
- Inaccurate revenue forecasts
- Unable to make data-driven strategic decisions

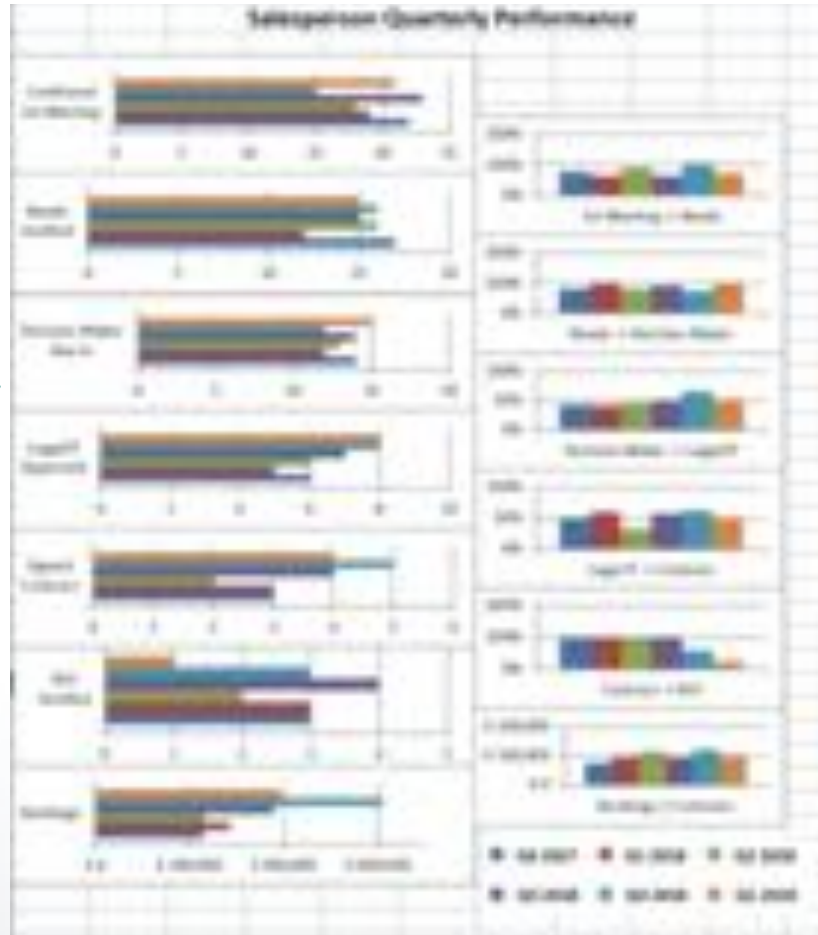
Solution

- Implemented BI and analytics system on top of their CRM
- Generated daily dashboards for the executive team, each manager, and each salesperson
- Implemented 1-on-1 meeting cadence to review activity dashboards with front-line salespeople

<https://www.bizjournals.com/dallas/news/2017/06/05/report-dallas-based-omnitracs-exploring-sale-could.html>

<http://www.insightsquared.com/our-customers/>

Data-Driven Sales Management Applied to Field Sales



Less focus on prospecting more focus on opportunity progression

Measured over longer time periods (quarterly vs. monthly)

Data-Driven Sales Management Case Study



- Fleet management system for trucking industry
- 1,000 Employees
- 6-digit deal size
- 12,000 customers across 70 countries

Problem

- Incomplete opportunity data from salespeople
- Inaccurate revenue forecasts
- Unable to make data-driven strategic decisions

Solution

- Implemented BI and analytics system on top of their CRM
- Generated daily dashboards for the executive team, each manager, and each salesperson
- Implemented 1-on-1 meeting cadence to review activity dashboards with front-line salespeople

Result

- Sold to PE firm for \$800M in 2013
- Forecasted \$400M in revenue in 2017
- Rumored valuation of \$2B

<https://www.bizjournals.com/dallas/news/2017/06/05/report-dallas-based-omnitracs-exploring-sale-could.html>

<http://www.insightsquared.com/our-customers/>

Quantifying the Salesperson's Journey

Develop

Step #2: At 6 month employee anniversary, compare coaching assessments to interview and training assessments. Assess hiring managers and trainers on performance.

Step #3: Compare coaching assessments to goal attainment. Assess hiring managers coaching diagnosis and execution.



Sales is not “Magic”.

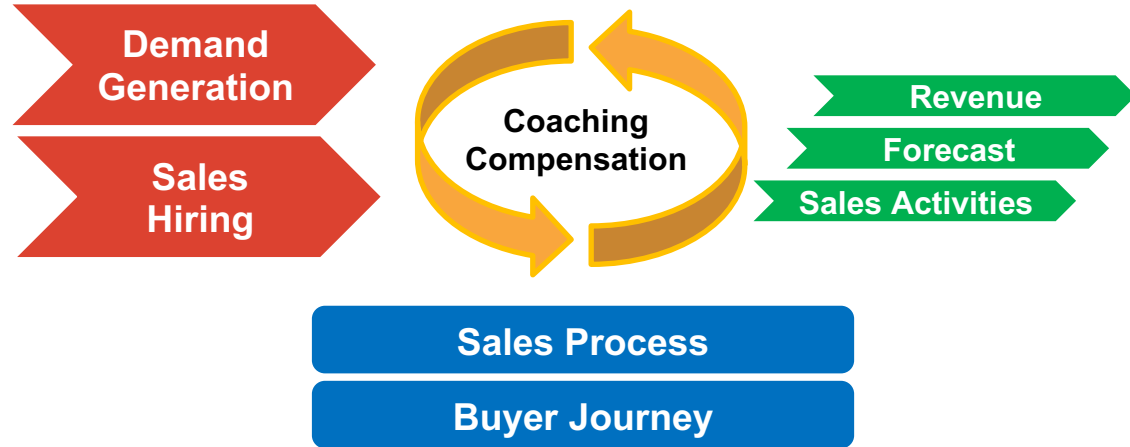
Process and data can make sales *predictable* and *scalable*

Sales is not a black box.

1. Hire salespeople
2. Assign them quota

Build a predictable, scalable sales machine.

Go-to-Market System Design



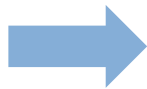
Optimal GTM System Design Depends on Context

Context consists of the product, buyer, and selling company



PRODUCT CONTEXT

- Complexity
- Price
- Category Maturity
- Product Maturity
- Onboarding requirements
- Competitive Landscape



BUYER CONTEXT

- Role(s)
- Industry
- Buyer Journey
- Local Culture



COMPANY CONTEXT

- Strategy
- Stage of Venture
- Culture

Thanks!



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