



THE SCIENCE OF
SALES

BUILD A HIGH VELOCITY MACHINE

THE ULTIMATE SALES PLAYBOOK

BY TIM MUENCHEN

*"The step-by-step process
and playbook I used to create
a \$15M, \$24M and \$60M
business from ground zero."*

ABOUT THE PLAYBOOK

What's all this talk about playbooks?

Every winning team has a playbook. And the greatest ones have a process. (Just ask Saban and Belichick).

It's pretty simple, in order to launch and build anything meaningful you need to have a proven system. And certainly, if you're trying to build a high velocity sales machine – one that fires on all cylinders with scaleable, predictable, and repeatable revenue – you sure better have a rock solid playbook.

The following pages contain the step-by-step process and playbook I used to build a \$15M, \$24M, and \$60M business (all from ground zero). It's a work of art I've iterated on over the last 20 years. It's blueprint that has worked multiple times with great success.

FORMAT: In this ebook, I present the actual process slides that I use. It's not really a "how-to" book. I tend to think of it as a "here's-what-worked" book. It's a template for you to build your process.

I've broken the book into 3 sections. The first part offers commentary on some of the key pieces of the playbook. I thought it made sense to explain some of the process. The second part is the playbook itself - the meat and potatoes. The third part offers guidance on metrics, reporting, training and resources.

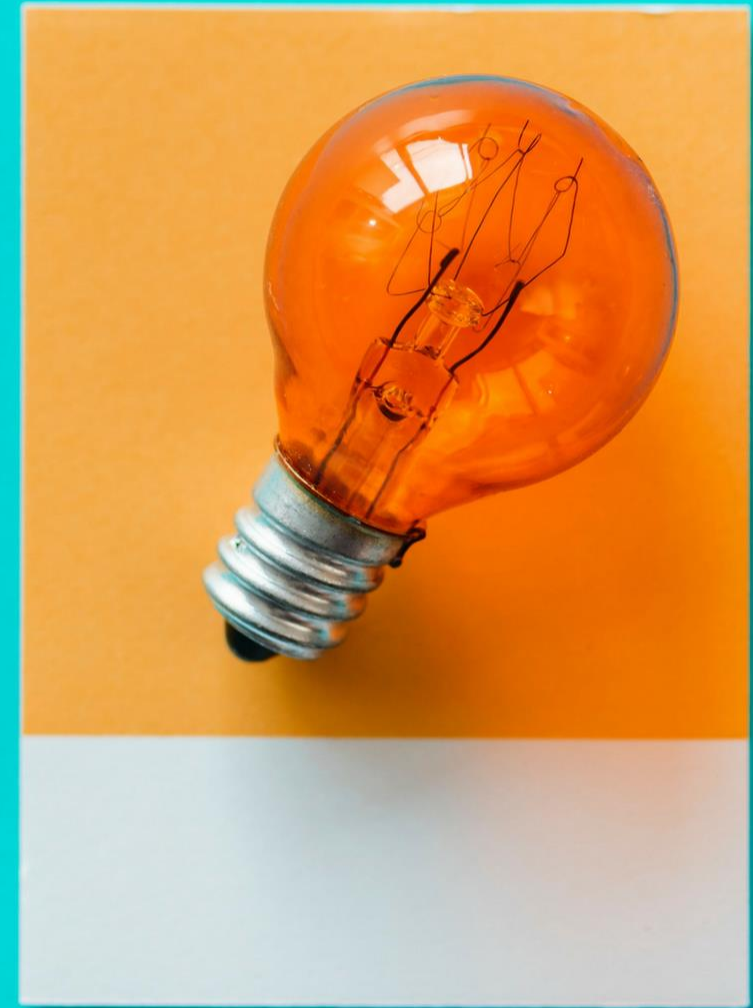
I wish I had this book 10 years ago. I **hope it helps you put the pieces together for your high velocity sales machine.**



TABLE OF CONTENTS

What's inside?

- (1) Why Do I Need A Sales Process?
- (2) The Right Specialization of Talent
- (3) The Right Organizational Structure
- (4) Finding your ICP
- (5) The 14 Step Sales Process
- (6) 5 Facts in 5 Minutes
- (7) The Sales Stack
- (8) 15x12 Cadence
- (9) The Marketing and Sales SLA
- (10) Keys to Qualification
- (11) The ANUM Scorecard
- (12) Elements of a good pitch deck
- (13) Cement the Sale
- (14) Sales Metrics Waterfall Report
- (15) Sales Training – The Curriculum
- (16) Links and resources





PART 1



THE PLAYBOOK COMMENTARY

A detailed description of the key processes



WHY DO I NEED A SALES PROCESS?

There's a million reasons. Here's 8.

A consistent process rep to rep means quality control.

Whether the pitch is delivered by the most tenured rep or the newbie fresh out of new hire training, a process ensures the pitch is delivered consistently and with quality.

A process delivers efficiency. Ever watch a master craftsman at work? They seem to deliver beautiful work with little to no effort. Meanwhile, the apprentice grinds around producing mediocre work. A process ensures no more and no less work than is needed. It delivers mastery.

A process provides a roadmap... for the rep... the customer... for the VP of Sales. You know where you are in the sale and more importantly you know the next step. There are no surprises.

It delivers more accurate forecasting. The process is not a broad set of rules with a few squishy sales stages that go into the CRM. Process delivers a well-oiled machine that clicks off protocols and next steps with clarity.

A process leaves a better impression on clients. No stone is left unturned. No time is wasted. The process delivers value from beginning to end. Ever have a really good sales person? One that made buying a pleasure? They deliver a better customer experience.

A process allows you to be a trusted advisor. With a process there is zero "shooting from the hip". Every one of your sales reps can take the posture of the challenger role and teach, tailor and take control of the sales dialog.

A process allows you to be world class. We live in a commodity world. If you have a good business model, someone has copied it... or likely will. And then, how you do something is as important as what you do. A world class process makes your company a world class leader.

The right sales formula is built around a scientific process. So, your game plan is to build a process... a proven system.

THE RIGHT SPECIALIZATION OF TALENT

One size does not fit all.

Henry Ford had it right about **specialization of talent**. When he installed the assembly line for mass production he reduced the time to build a car from more than 12 hours to 2 hours and 30 minutes.

I saw a massive productivity once I specialized the sales roles. Our specialization led to immediate increases in the number of demos, the overall funnel size and new bookings.

So I retired the full cycle field sales rep. I replaced the model with specialized roles for lead gen and closing. SDRs hunted and qualified prospects. AEs demoed and closed opportunities. And it was all done with an inside sales model that was geeked out with technology and reporting.

Of course, **Aaron Ross** changed the landscape of sales in 2011 with his **Predictable Revenue** model. I believe wholeheartedly in the model, and have altered it slightly to fit our situation.

The four core acquisition roles are:

- 1) **Marketing** creates leads.
- 2) **Lead generation** qualifies leads.
- 3) **Account Executives** close deals.
- 4) **Customer Success** onboard and upsell customers.

I also specialized roles within roles, like inbound and outbound SDRs, SMB and enterprise AEs, direct sales and partner sales, we even had an SDR that did nothing other than build ICPS.

The more specialized you create your roles, the more effective the team will be.



THE RIGHT ORGANIZATIONAL STRUCTURE

Break out the rainbows and peace signs.

It's all about unity!

Here's the way I see it... Leads are the fuel that powers the machine. It's the marketing team's job to create leads. It's the sales team's job to close leads.

You can't build a high velocity machine if it's not connected. Marketing and sales have to be one team.

But, it rarely is. What's worse, there's usually friction ("the marketing leads suck"... "the sales team is lazy"...). It's a serious gap.

I was able to build high producing teams because we had the right team balance and unity...

The right organizational structure is one where marketing feeds the lead gen team. The lead gen team feeds the sales team. And through the process the acquisition cost structure is favorable. Until you figure this out... its fluid.

THE RIGHT ORGANIZATIONAL STRUCTURE

A background image showing a business meeting. A person in a blue suit is pointing at a document held by another person in a dark suit. A laptop is visible on a desk in the foreground.

There is no model until proven. Starting with 10 full cycle AEs because you need sales is a mistake. The funnel starts with lead gen. So, invest in lead gen and marketing to build a steady flow of sales opportunities first.

We added lead gen reps until all AEs had the correct number of demos per month. Once we were able to understand SDRs to demos and demos to close, we were able to scale the lead gen and AE team.

Don't budget top down. Budget production up. I think of spend as production up. I spend money on programs that drive leads that convert. I measure CPL and ROI by channel. Then I'll double down on the channels and tactics that works.

There were 4 core channels that eventually drove 1,500 inbound leads per month for our team. It allowed us to transition from 100% outbound, to inbound-outbound mix, to 100% inbound over 24 months.

Marketing and sales had one common revenue goal. Sure, marketing delivers MQLs and sales delivers bookings, but together they deliver a singular revenue goal. We had amazing stats: 20% lead to demo, 55% close rate, 12% lead to customer... but we were all focused on one goal - bookings. And everyone understood how their function added to the goal.

We were one team. Daily stand ups. Daily feedback loops. Same team.

THE 14 STEP SALES PROCESS

The 14 step sales process

Don't confuse sales stages with sales process.

Sales stages are those 7 to 10 fuzzy stages you put in your CRM to identify funnel progression so you can produce a sales forecast.

Sales process is a holistic strategy that covers the who, what, when, where and how of sales. That is what this book is about.

It is a step by step guide that can walk a novice from initial prospect targeting all the way through closing and upselling. It is a cradle to grave deal.

It's your acquisition bible. And it's filled with your version of the 10 commandments along with plenty of do's and don'ts.

It contains your value proposition, your objections, your script, your technology, your metrics, your reporting, and step-by-baby-step instructions of every detail along the way.

It's your road map to closing deals. And each step has a very specific purpose.

There's a process inside the process for each step. And preparation for every step is essential for success.

Prospect feedback and agreement are necessary to continue to each step. And they should map to your sales stages.

Your sales and marketing team should have it committed to memory. And your entire staff should be trained on it so that everyone from the mailroom to the CEO suite understands your acquisition model.

I've always believed it's my job as a leader to give the team clear directives with a written step-by-step acquisition strategy.

START WITH THE ICP

We only targeted the best clients

While it's great that we could sell to a broad market, we understood that was not our ICP.

Our tribe was the group of people whose problem we directly solved, every time. And this was a subset of the larger market.

We identified the exact firmographics (industry, sector, size, titles) of our targets.

We defined:

- 1) **Industry verticals** – by SICs
- 2) **Business size** – revenue, employees, locations
- 3) **Exact titles** – financial buyer, user buyer, technical buyer, coach
- 4) **Additional account characteristics** – demo, geo, psycho, technologies...

We also identified who was a bad fit and waste of time. And we were very clear to everyone not to waste time on these red flag prospects.

We were data pros. We built a complete database of ICPs. After we had the data we surrounded them with great offers and products that made their life easier and more profitable. Building a database means data tools. And you need to be Jedi level.

We built a database of the right prospects.

It started by defining our ICP..



5 FACTS IN 5 MINUTES

5 facts in 5 minutes

It sounds so simple... know who you're calling.

After all, people buy from people. And if you can connect to people on their level... and truly empathize with them... and deliver value... a sale isn't far away.

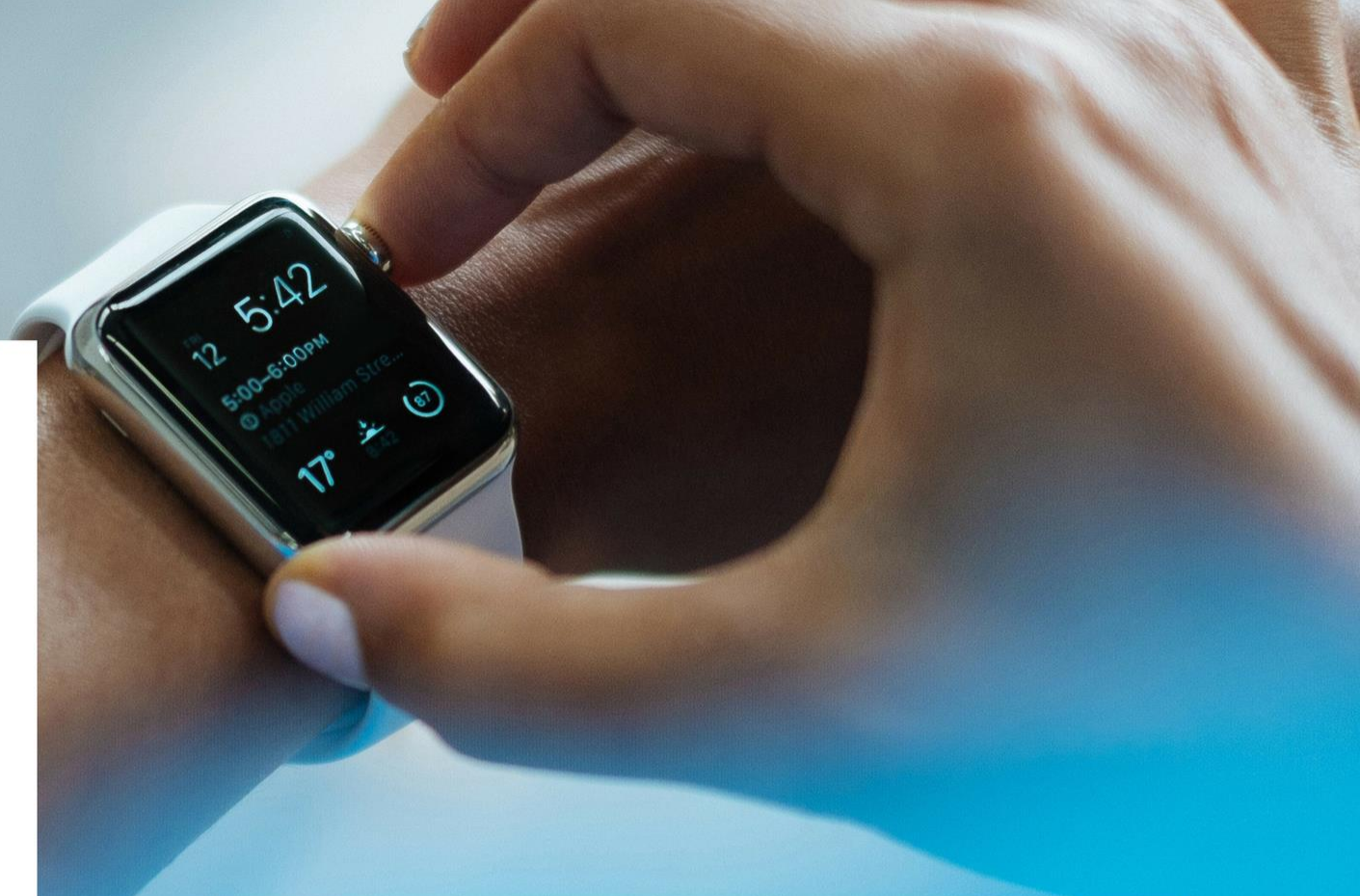
But I've been amazed... reps will actually cold call.

Meaning, pick up the phone and place a call with zero idea of who they are calling or their profile. Just some random name and number on a list.

And this is a colossal mistake.

You need to get 5 things straight:

- 1) Have we talked to them before?
- 2) Who am I talking to?
- 3) What do they know about us?
- 4) What are the company details?
- 5) What can I find personally on this person?



And there's a process for this too. I call it high speed creeping (my 15 year old has nothing on me).

Follow the research on the following pages. Get the profile of the person and company and then make the call.

Know about your prospect so you can connect with meaning.

Rapport is the first sale. People buy from people they trust.

THE SALES STACK



Technology has changed the sales game.

There's an amazing set of tools that we now have at our disposal.

Everything from data mining, to marketing automation, to sales automation, to chat, to online collaboration, to CRM, to reporting and metrics... and it doesn't end... it really doesn't.

If it feels like you're running a technology lab, you're in the right neighborhood.

Tools help the team connect with the right targets faster, while delivering a richer customer experience.

BUT... You can also waste a lot of money of stuff you don't need.

The sales stack page shows the technology stack I used at both an early and mid-stage company.

It's a good representation of the basics.

(By no means does this cover all the technology I tested or wanted, as there are many "nice to haves" vs "must haves").

You'll need to equip your sales team with the right technology. Budget and build the costs into your model.

THE 15x12 CADENCE

We had a non-negotiable contact cadence.

The reps understood that the full cadence gives them the best opportunity for success with every prospect.

I provide my cadence on the following pages. So what's your cadence? The one that works. That means: Test. Test. Test.

Just because I used a 15x12 cadence doesn't mean that's right for you. Find the sweet spot. Test the length, pauses, and channels until you've found a winning formula.

Your cadence should involve multiple channels (email, phone, social).

It should be loud. Studies show we are hit with over 5,000 advertisements per day. So many, in fact, we can't even process them.

You want to make the cadence tight enough that there is no way the prospect doesn't know you are trying to get them by the end.

On the emails, we used personalization. but we didn't feel compelled to send cat videos... or live videos of the sales team either.

I used a variation of the sideways sales letter (see Jeff Walker's Launch Formula).

Here was my challenge: Can you actually deliver value in your lead gen emails? Can you challenge conventional wisdom and show them a better way? Send that.

My goal was to make it smart, savvy and fun...

But let me be clear. **I understand lead generation is the hardest job in the company.** I think it is also the most valuable.

And the difference maker is the phone. Don't let reps play Future Email Marketers of America. Pick up the phone.

Yeah, the new email tools are cool, but you know what makes you stand out? The phone.

Double tap your contacts – email and phones. Do it throughout your cadence and they'll know who you are and why you're calling.

If you hit your prospect with a multi-touch multi-channel outreach, you'll have every opportunity to connect.

THE MARKETING & SALES SLA

We set some simple ground rules.

The marketing team committed to a leads number every month. (It grew from 200 to 1,500 over 12 months.) And marketing needed to be real about the quality. It's easy to drive leads. The sales team needed to agree they were quality leads. That's a true MQL.

The sales team committed to a response time (15 minutes or less). And they also committed to entering data into the CRM, adding notes, and giving feedback.

The time value of a lead is real. The odds of contacting a lead if called in 5 minutes versus 30 minutes drop 100 times! If you're not following up with leads in 5 minutes, you're wasting your time and marketing spend. We made it part of the SLA.

The SLA also covered feedback. There was a daily feedback loop, not a weekly meeting. We sent campaigns daily and every campaign had real time feedback from the lead gen team. Even though reporting was automated through the MA platform and CRM, personal interaction was mandatory.

Sales had a voice in marketing. Sales objections are the best marketing copy. And understanding attribution by source, campaign, and message allows you to accelerate sales leads.

We were able to drive high volume of leads and convert at a high rate because we had established a constant feedback loop and trust. **Every marketing meeting included sales. And vice versa. It had a profound effect.**



KEYS TO QUALIFICATION

Understand RC

2. PROBLEMS

Which problems do
There could be more
eg. existing solar solu
a good investment (

TOO MANY
POINTS FOR
COMPARISON

(FI Hard to
coordin
bookin
a group.

Find quality. Not every prospect is a good prospect.

- > Marketing creates leads.
- > **Lead generation qualifies leads.**
- > Sales closes leads.

You need to agree on what a qualified lead is. What makes this a good opportunity? Does the sales rep have a chance to make a sale?

Your qualification criteria must be bright line. No questions. It is or it isn't a SQL.

The two most common criteria are BANT and ANUM.

BANT: does the lead meet standards for Budget? Authority? Need? Time?

ANUM: does the lead meet standards for Authority? Need? Urgency? Money?

Of course there are others. And you can make up your own. Just have one. Agree on it. And build your process around it.

We used ANUM +. The process is spelled out on the following pages.

THE ANUM SCORECARD

The ANUM Scorecard

It's important to understand the the quality of the leads being transferred to sales.

We created the ANUM scorecard to rate and score the efficacy of every hand off.

It's an opportunity for two things to happen: (1) first, the sales team can score the lead and the rep on the quality of the lead. (2) It's also an opportunity for the sales team to provide training to the lead generation team on how to set up the best discovery call for sales.

It's a feedback loop that leads to better quality and better reps.

Since most lead generation reps are trying to earn a promotion to sales this is an important step. Lead gen reps receive peer feedback to understand the characteristics of a solid lead.

We had team members meet weekly to go over all hand offs.

Scores were kept in the CRM. Over time we built a standard score for what makes a good lead and a poor lead.

This collaboration is a key piece of building a world class sales structure. It ensures every handoff is dissected and replayed.

This simple training tool will build better reps and bigger funnel.

THE ELEMENTS OF A GOOD PITCH DECK

Two ways: The right way. The wrong way.

There are two ways to pitch...

1) **A features based presentation** – Here's what we do. Here's how it works. What do you think? (Not good)

2) **Benefits based presentation** – What interests you about what we do? Why? How does it work for you today? So, if I could show you a better way to do that and it was risk free, you'd probably want to try that. Ok, I'm going to spend the next hour showing you exactly how I can do that. How's that sound? (Much better)

You will always make a sale if you solve a problem. If you help your customer realize a big gain or solve a big pain.

You will always make a sale if you focus on their need and help them run a better business.

You will always make a sale if you deliver value beyond what they pay you.

And if you can't do these things... you shouldn't attempt to close.

There are 3 core sales books I used to build sales decks. Integrity Selling, The Challenger Sale, and The Lost Art of Closing.

Read them. They will school you on building a sales process. Using the process to teach, tailor and take control, and getting agreement on the 10 sales commitments. They are pure gold.

[Note: I didn't include my pitch deck in this playbook. But your pitch deck is a central piece of the playbook. And the pitch deck should be 100% scripted. Every word. Every question. Every objection rebuttal.]

I'll give you something better though. It's the template to building your pitch deck.

Check out The Greatest Sales Deck I've Ever Seen. It's a breakdown of the Zuora pitch deck... and it's brilliant.

Steal the template and build yours.

CEMENT THE SALE

It's not over until they're happy.

The sale doesn't stop once they say "yes". You need to cement the sale.

We built a process to deliver on what we sold... our goal was to make the client so happy they would purchase additional services and offer referrals.

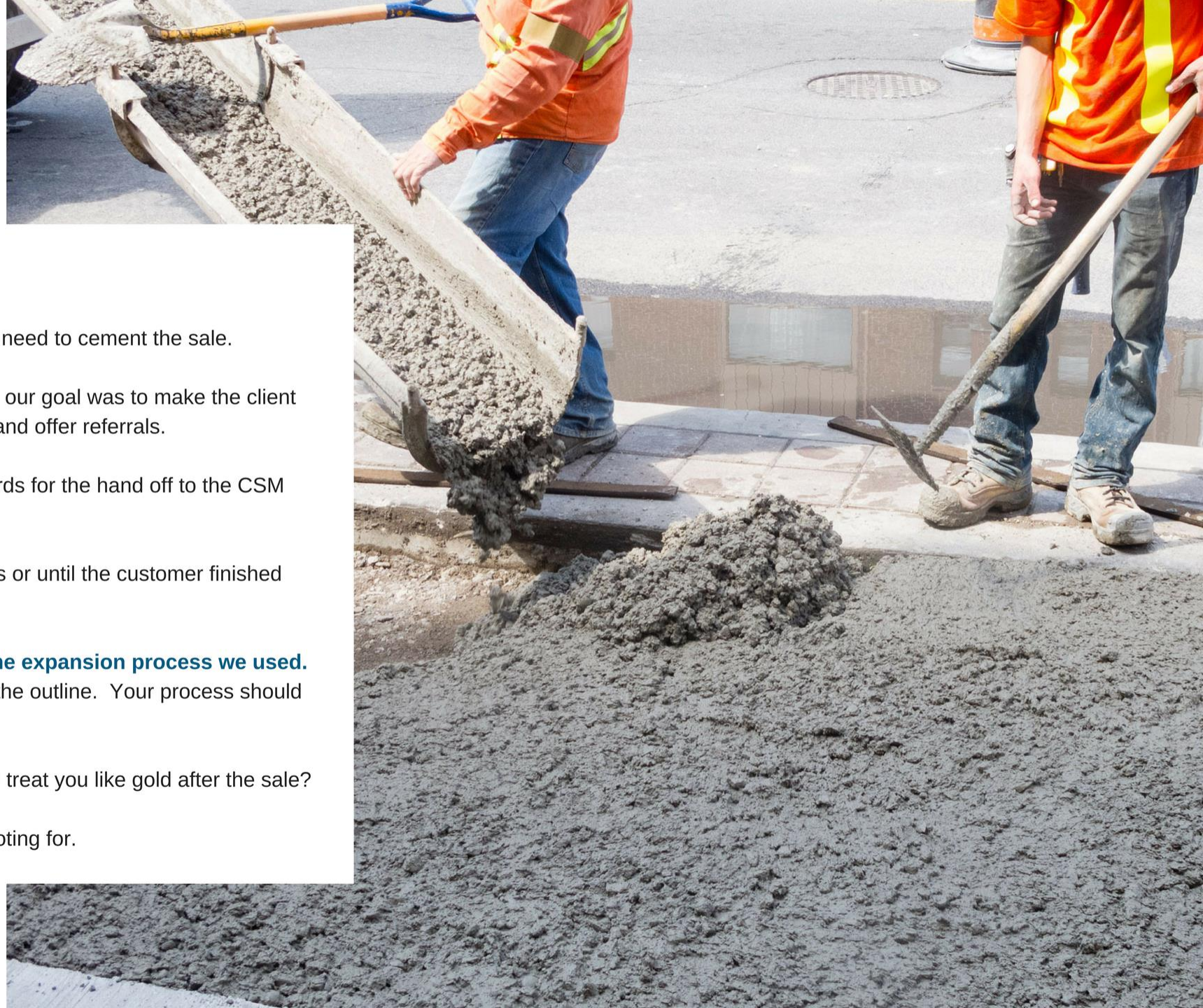
We made a checklist. In it, we established standards for the hand off to the CSM team and weekly check in.

The process had weekly check ins for four weeks or until the customer finished onboarding.

The following pages provide a brief outline of the expansion process we used. I've removed the company specific details and left the outline. Your process should be very specific.

Ever have a sales person continue to follow up and treat you like gold after the sale?

It builds raving fans... and that's what you're shooting for.



SALES METRICS AND THE WATERFALL REPORT

Take the mystery out of sales performance.

If you measure the right KPIs and build the right standards, sales productivity is math equation.

For the lead generation team, it's a waterfall report that measures activity and performance from initial leads to SQL.

Measuring performance from MQL to Connect to Qualification to Handoff to SQL provides me a detailed view of the team performance and individual performance.

Over time it established benchmark standards that indicate what's needed to deliver the right number of leads to sales.

And the conversion rates between each step show exactly what's working and what needs work.

The waterfall highlights:

- 1) Hustle quotient
- 2) Pitch quality
- 3) Objection handling
- 4) Lead quality
- 5) Lead efficiency

For AEs it's really all about the Big 4:

- 1) Funnel
- 2) ACV
- 3) Close rate
- 4) Sales cycle

Knowing these 4 metrics means you understand your sales velocity.

And you can predict – with a high degree of confidence – your bookings.

Measuring these over time allows you to build standards and benchmarks. And these benchmarks serve to guide your reps relative to their productivity.

Of course there are a dozen or so other metrics that are important. But my focus is keenly on the waterfall and Big 4.

The following pages show the KPIs I measure. Of course you should build a reporting dashboard in your CRM and make it the focal point of your numbers management.

And the other thing about reporting and metrics... **create a stack rankings and a visible leader board**... get a BIG TV... and project the results for everyone to see. It has an amazing effect.

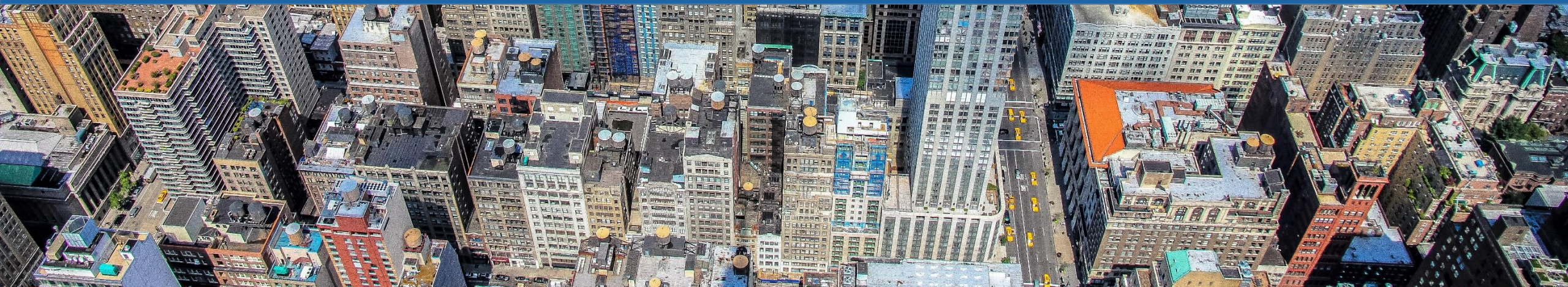


PART 2



THE SALES PLAYBOOK

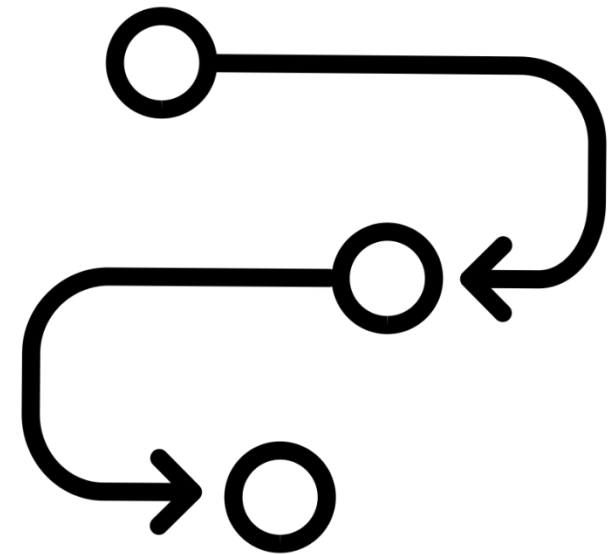
A step-by-step guide to the sales acquisition process



Playbook Agenda



- **Why Do We Need a Sales Process?**
- **Overview of Four Core Sales Roles**
- **The Right Organizational Structure**
- **The 14 Steps of the Sales Process**
- **Review Each Step**
- **Questions & Answers**



Why do we need a sales process?



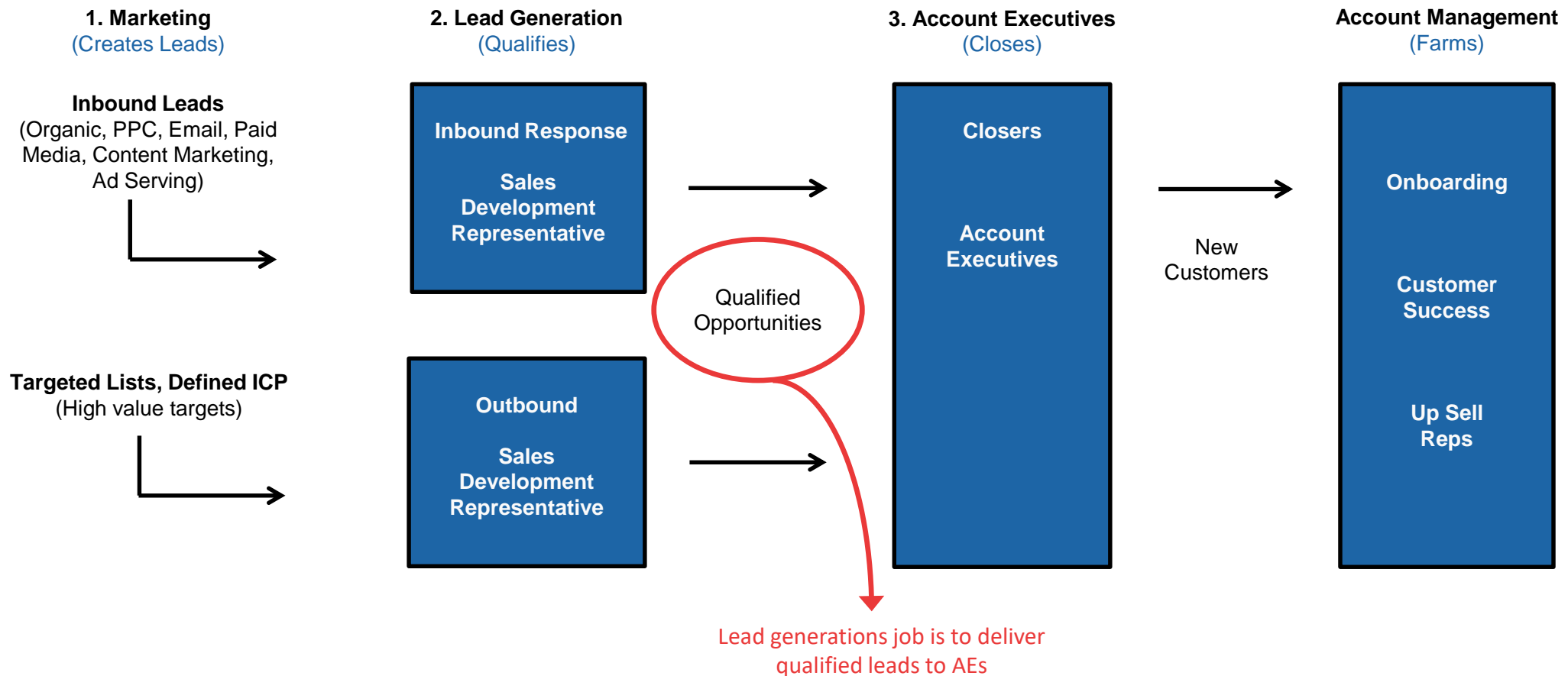
- **A consistent process rep to rep.** It's quality control.
- **A scalable & repeatable process.** It delivers efficiency.
- **Know where you are and where the finish line is.** No surprises.
- **More accurate forecasting.** Know when to forecast.
- **Better impression on clients.** Thorough with no stone unturned.
- **It's a strategic process.** You become a trusted advisor.
- **We live in commodity world.** How you do something more important than what you do.



The Right Specialization of Talent



Specializing the Four Core Acquisition Roles:



The Right Organizational Structure

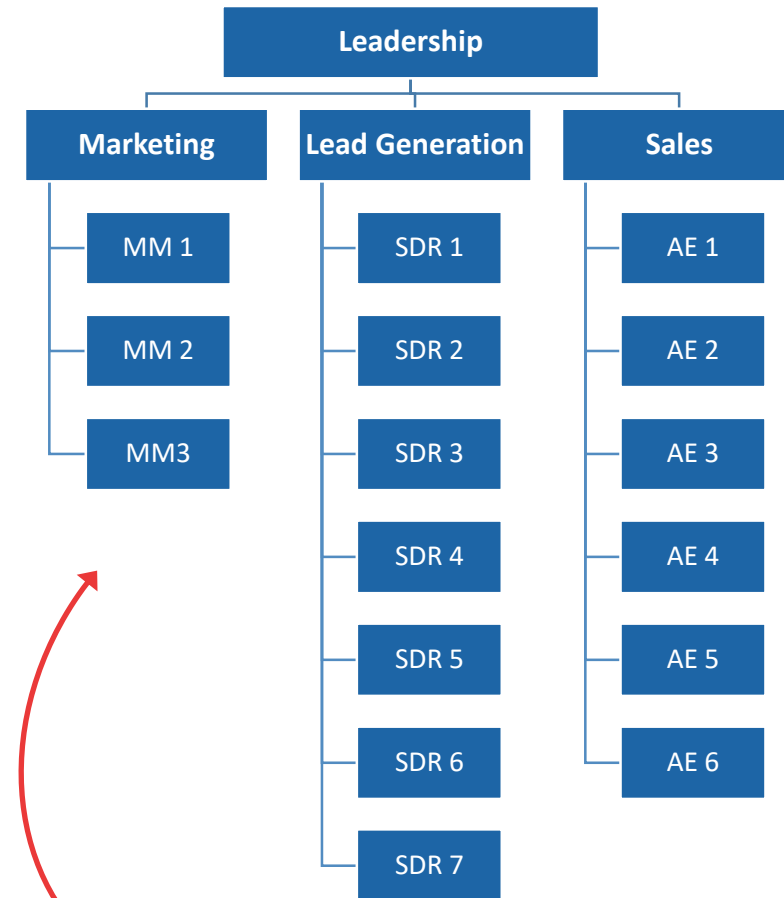


Marketing & Sales Are One Team

- It starts with marketing
- Heavy focus on lead generation
- Sales process that is well defined
- Constantly test new markets and channels

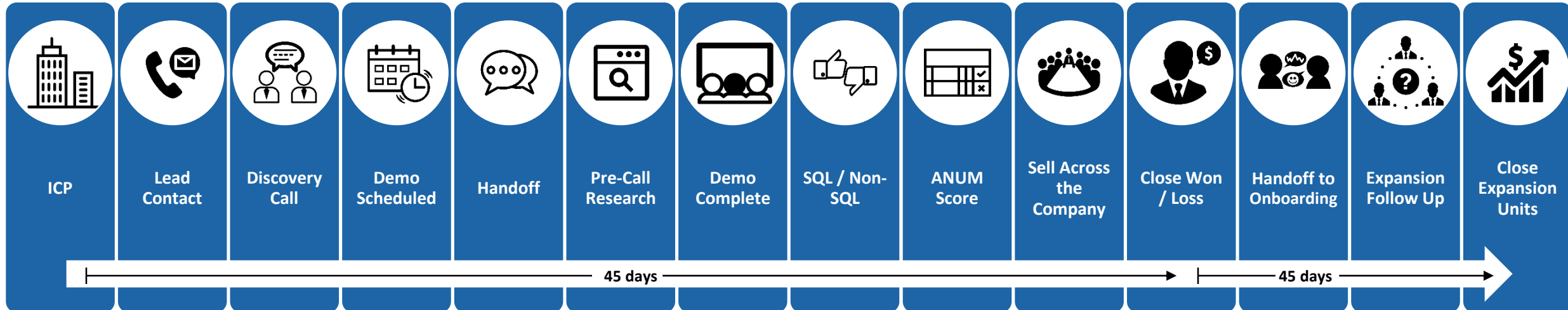
The tail wags the dog

- Not all sales reps at quota? (Need more lead gen)
- Not enough funnel? (Under invested in marketing)
- There is no predetermined ratio
 - Budget shouldn't dictate marketing spend... ROI should
 - Hire SDRs until your AEs can't take lunch break
 - Only hire AEs when they have steady flow of prospects to work



The model that produced 1,500 MQLs, 215 demos and 115 new customers per month

Sales Process & Playbook (14 steps)



- **14 steps** that act as a Roadmap to closing deal
- Each step has a very **specific purpose**
- **Preparation** for each step is essential for success
- Prospect **feedback & agreement** is necessary to continue to each stage
- Add stages to CRM and assign close value to each stage
- Lead > prospect > opportunity > closed won /closed lost / nurture

Step 1: ICP



Step 1 Process:



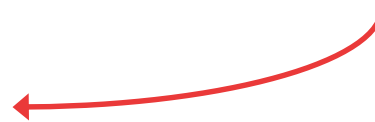
- Make sure prospect is ***right fit*** for our services
- Does it fit our ***Ideal Client Profile?***
- Are the prospect characteristics consistent with our best buyers (industry, size, titles, other characteristics)
- Does the lead draw any red flags for bad fit?
- Verify both inbound and outbound leads make sure prospects are a good fit for our services

Ideal Client Profile (Who is our ICP?)



- Everything starts with the right target
- Define:
 - Industry vertical
 - Business size
 - Exact titles
 - Account characteristics
- Also understand **bad fits** and wastes of time
- Deliver a **specific message** to each buyer type
- **Need data tools** to source prospects

Get this part
right first



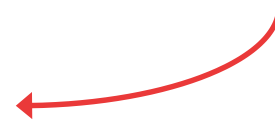
These are the ONLY targets we
should be “talking to”

ICP – Email Data Profile (Everything starts with the ICP!)



- **Identified companies** - your “Dream 100” hit list
- **SIC codes** – build a look alike audience
- **Geography**
- **Size**
- **Titles**
- **Fields** – Company name, Contact name, email, phone, address, title, website, employee size, ?
- **Domain suppression** against non-icp
- **Existing client suppression**
- **Suppress** any data you already own
- **Data verification** through a verification service (Brite Verify)
- **Sources:** Zoom Info, InfoUSA, Radius, Synthio, Sales Ripe

You need to be a
Jedi master of
data and data
tools



Only shoot at the
right targets

Step 2: Lead Contact (15 x 12 Cadence)



Step 2 Process:

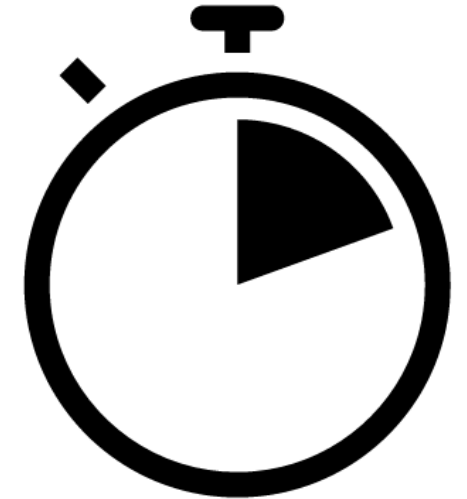
- Perform *sales outreach* to connect with leads
- SDR performs research *prior to* calling
- 5 Facts in 5 Minutes - goal is to get details on company and person
- Follow ICP research process - use technology stack for efficiency
- Inbound priority #1 is to contact every lead in under 15 minutes (time value of a lead)
- Make phone calls and send email follow up to new leads daily
- Start 15 x 12 cadence on new MQLs
- Make follow up calls to uncontacted MQLs
- Use CRM tasks to schedule your calls. Just follow daily call log.
- On calls, be naturally inquisitive and helpful
- Know what they downloaded and looked at and center your conversation on that topic
- Log conversations and results into CRM



5 facts in under 5 minutes



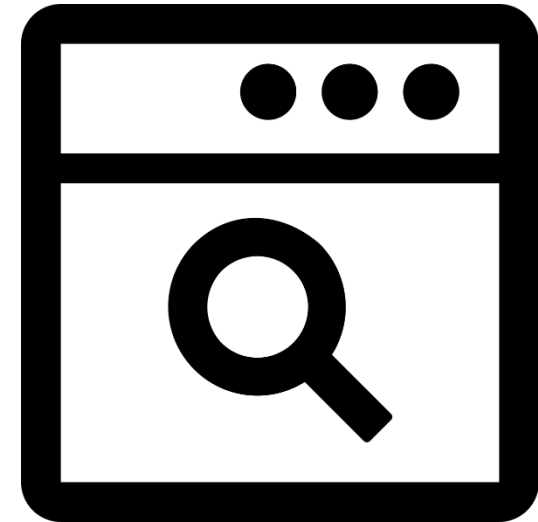
- 1) Have we talked to them before? When? Who? Outcome?
- 2) Who am I talking to? Title? Job? Tenure? Executive or Manager?
- 3) What pages and content did they consumer from our website?
- 4) What are the company details? Years? Locations? How big will they potentially be? ICP?
- 5) What can I find personally on this person? Interests? Fun facts?



Approach (rapport) is the first sale. People buy from people they know, like, and trust. Know about your prospect so you can connect with meaning.

- Marketing Automation Platform (Hubspot)
- CRM (Salesforce)
- Rapportive
- Google
- Website
- LinkedIn
- Facebook
- Twitter
- Instagram
- Look up company and person
- Add key details to CRM

Top to bottom
(in this sequence)



This research will give you a profile on both the person and their business

The Sales Stack



- **CRM** (Leads/Opportunities/Bookings; Sales Dashboard - Salesforce, Zoho, or Netsuite)
- **Marketing Automation** (Lead information, Landing pages, Pages consumed – HubSpot or Pardot)
- **Sales Automation** (Email engagement and tracking - Hubspot Sales, Tout, SalesLoft, or Yesware)
- **Zoom Info / Synthio / Sales Ripe** (data intelligence)
- **Datanyze / Ghostery / Alexa / Similar Web / What runs** (technographics)
- **Join.me / GoToMeeting** (online meeting & collaboration tool)
- **Ring Central** (phone communications & call recording)
- **Hunter.io** (email identification)
- **LinkedIn Sales Navigator** (email identification)
- **Hoopla** (sales leader board)
- **Reflector** (screen mirroring)
- **Calendly** (automated meeting scheduling)
- **LinkedIn** (Lead information & Social Selling)
- **Twitter** (Lead information & Social Selling)
- **Facebook** (Lead information & Social Selling)



Sales intelligence tools
for efficiency and speed

Points of Communication – Outbound



15 x 12 Cadence for each prospect:

A tight cadence over a short interval of time

1	2	3	4	5	6	7	8	9	10	11	12
Touch 1 Email 1		Touch 4 Email 2		Touch 6 Email 3			Touch 9 Email 4		Touch 12 Email 5		Touch 14 Email 6
Touch 2 Call 1	Touch 3 Call 2 No VM	Touch 5 Call 3		Touch 7 Call 4			Touch 10 Call 5	Touch 11 Call 6 No VM	Touch 13 Call 7		Touch 15 Call 8
					Touch 8 Social Touch 1						

15 x 12 cadence: 15 touches (6 emails, 8 calls, 1 social touch) over 12 days

Difference maker: Phone cadence makes you stand out / they will know you are looking for them after 6 emails and 8 calls in 12 days

Getting them to pick up: double tap it / don't leave a message on first call / call twice a day all call days (caller id game)

Note 1: If you are true to the cadence you give yourself every chance of making contact (rule of 20)

Note 2: Use Hubspot Sales dialog box to follow opens and clicks. Call all leads immediately upon interaction.

Automated Email Cadence (6x12)



Day 1

Email 1:



Day 3

Email 2:



Day 5

Email 3:



Day 8

Email 4:



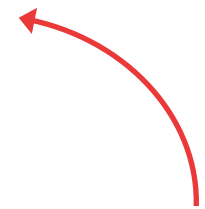
Day 10

Email 5:



Day 12

Email 6:



I removed the subject lines but they should read like a sideways sales letter

[A sideways sales letter]

On the emails...



Short & Sweet: 5 lines

1. **Short insight** on value prop / pain point (use stats)
2. Here's how **I helped your peers** (use stats)
3. **I'm trying to connect** because I'm confident I can do the same for you.
4. Let me know when we can set up a **short call**
5. Link to **valuable info**

DO NOT SEND A WALL OF WORDS!

Day 1 Email



Email 1

Subject line: Never audit another T&E report. And decrease overall spend by 5% while doing it.

Hey **Smith**

I know you dread T&E audits. It's a best practice... but, it's also a waste of time.

I'm reaching out today because I help companies eliminate manual T&E auditing with a simple plugin.

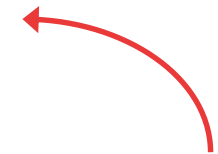
The result is automated auditing on 100% of all T&E reports. This in turn reduces overall T&E spend by 5%.

And the best part... it pays for itself with a 650% ROI.

I'd like to schedule a quick call to tell you how it works... let me know when you might have 10 minutes to chat.

Thanks,
TM

Check out the report: [AI is smarter than your audit. Power of patterns eliminate point in time auditing.](#)



Make your emails short. Your executive audience won't read your "value prop" email. Make it a bullet point read.

Day 3 Email



Email 2

Subject line: Audit 100% of T&E expenses without lifting a finger (While decreasing audit costs 50%).

Hey **Smith**

We're all hearing about how AI is changing the world.

And it's never been truer than in the accounting audit function.

AI is eliminating work. And accountants love it.

I'm reaching out because I help companies use AI to audit 100% of all T&E reports with a simple plugin.

This new automation provides better audit coverage and decreases staff auditing costs by 50%.

The best part... it pays for itself with a 650% ROI.

I'd like to schedule a quick call to tell you how it works... let me know when you might have 10 minutes to chat.

Thanks,
TM

Check out the report: [AI is smarter than your audit. Power of patterns eliminate point in time auditing.](#)

Yes, you have to personalize. No, you do not have to go crazy or be creepy. Make the copy valuable and to the point.



Day 5 Email



Email 3

Subject line: 10% of employees commit T&E fraud. Catch it automatically with AI.

Hey **Smith**,

10% of your employees commit T&E fraud and it adds up to a BIG number.

You can now catch 100% of the T&E cheats while eliminating risk and non-compliance.

And the best part... it pays for itself with a 650% ROI.

I'm reaching out today because I help companies use AI to audit 100% of all T&E reports with a simple plugin.

I'd like to schedule a quick call to tell you how it works... let me know when you might have 10 minutes to chat.

Thanks,
TM

Check out the report: [AI is smarter than your audit. Power of patterns eliminate point in time auditing.](#)

Include a helpful link to relevant information. Make sure it has a conversion opportunity.



Day 8 Email



Email 4

Subject line: 5% of employees commit 82% of T&E fraud. Catch 100% of it with AI.

Hey **Kevin**,

It's true... 5% of your employees commit 82% of T&E fraud.

That's means it's hard to catch these transactions in a traditional audit.

But you can catch 100% of fraud, collusion, and non-compliance with AI.

And the best part... it pays for itself with a 650% ROI.

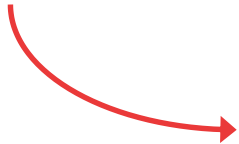
I'm reaching out because I help companies use AI to audit 100% of all T&E reports with a simple plugin.

I'd like to schedule a quick call to tell you how it works... let me know when you might have 10 minutes to chat.

Thanks,
TM

Check out the report: [AI is smarter than your audit. Power of patterns eliminate point in time auditing.](#)

Make your point with results oriented stats. Use numbers to stand out.



Day 10 Email



Email 9

Subject line: AI is eliminating T&E audits. And accountants love it.

Hey **Kevin**,

The bots are coming... and they're replacing the T&E audit function in a fantastic way.

You can now audit 100% of all T&E reports without lifting a finger.

And the results... are amazing.

A 70% reduction in non-compliant behavior. A 5% decrease overall T&E spend. And 50% reduction in audit costs.

The best part... it pays for itself with a 650% ROI.

I'm reaching out today because I help companies use AI to audit T&E reports with a simple plugin.

I'd like to schedule a quick call to tell you how it works... let me know when you might have 10 minutes to chat.

Thanks,
TM

Check out the report: [AI is smarter than your audit. Power of patterns eliminate point in time auditing.](#)



For this to work, your emails need to get opened. So, your subject lines need to be fire. Solve a pain or deliver a result in under 80 characters. Click bait is not a dirty word.

Day 12 Email



Email 7

Subject line: Busy... or not interested?

Hey **Kevin**


I've reached out a couple times and we haven't connected yet...

Let me know if you're busy or not interested.

I'm passionate about connecting because I know I can help you eliminate fraud, collusion and risk in your T&E spend with a simple plugin that pays for itself.

Send a quick response back and let me know if there's interest.

Thanks
TM



Think WIIFM. If I read this entire series would I learn something? Would I be compelled to respond because this can help me? Be real about your answer here.

Phone Cadence



- 1) Call inbound leads in **15 minutes or less**
- 2) No voice mail on **first pass**
- 3) **Call back in 1 hour**
- 4) **Call late** in day and leave VM
- 5) **Call two times per day** every call day (once in morning / once in afternoon)

On the voice mails...



Short & Sweet: 4 sentences

1. First name and company
 2. Value prop – how you solve pain point **1** sentence
 3. Your CTA
 4. Your contact info
- That's it... no selling



Build a predictable machine thru process.

Voice Mail Script



- **The Script:**

- Hey, Kevin... Tim with ABC...
- [Insert your best 1 sentence, results orientated, value prop statement]
- I help companies _____ so they can _____
- I wanted to schedule a 10 minute call to show you how I can do this for you
- I can be reached at xxx-xxx-xxxx. Thanks.

- **Note:** Substitute subject line of the email you are chasing

- **Final word:** It's the collection of messages that will get through. It's an open loop, people will connect the dots.

SLA Between Marketing & Sales



- **Marketing SLA** - Will deliver 100+ MQLs per month per IB SDR
 - MQL = content download from ICP with all contact data
- **Sales SLA Rule 1** – All leads will be contacted in 15 minutes of download
 - Inbound conversion rates 750% higher than outbound
 - Time sensitive – 100x greater results in 5 mins vs 30 mins
 - Know more about your company
 - Warm audience
 - They trust you enough to give you their data
- **Sales SLA Rule 2** – Track leads and progress in CRM with notes
- **Sales SLA Rule 3** – Report lead status for conversion tracking
- **Team SLA** – If you don't follow rules 1 - 3... you will be taken off inbound team



Step 3: Discovery Call



Step 3 Process:

- **Qualify prospect** for demo
- **BDR “sells the demo”** and value of taking a deeper look (benefits discussion)
- BDR **does not “sell the service”** (no features)
- **We qualify fit based on ANUM +**
- ANUM + = Authority / Need / Urgency / Money / Goals / Challenges / Plans
- BDR **confirms interest and qualifies prospect** based on lead gen process
- BDR has **described sales process and set expectations** with prospect
- BDR **schedules demo** with client & AE
- Lead **matched with right AE** (rotation rules, AE fit)
- Prospect notes added to CRM



We qualify based on ANUM

- **Authority** – Who is involved in the purchasing decision. Economic buyer? User buyer?, Technical buyer? Coach? Decision maker?
- **Need** – what do they do today? What systems? How do they solve for this today?
- **Urgency** – Is there a pending need to update? Acknowledge better way? Level of motivation?
- **Money** – Pressure test budget. Assure ROI. Ask about funding.
- **Goals** – What are they trying to accomplish as a company this year?
- **Challenges** – What are the challenges to their business this year?
- **Plans** – What are the competing agenda items?



Action item: Script the qualification call


Script everything (And train on it regularly)



- Outbound script
 - Inbound script
 - Discovery questions
 - Top 10 objections
 - Benefits statements
 - ROI calculation
-
- Tree the conversation
 - Build a standard pitch for everyone
 - Train on it daily
 - Do call recording sessions monthly



You should have pages for each of these in your playbook



Before we sell anything, we first identify the current situation, the desired situation, the gap... and get them to agree they want to solve the gap

The complex block is enclosed in a black rectangular border. At the top, there are two large, black speech bubble icons. The left one contains a white question mark, and the right one contains a white exclamation mark. Below these icons is a paragraph of text. The words 'current situation', 'desired situation', 'gap', and 'solve the gap' are underlined in the text.

The Script (Objections are good)



Outbound Phone Script

- Hey Chris, this is Tim with Orderly, thanks for picking up...
- The reason I am calling is because I work with multi-unit restaurants EXACTLY LIKE YOURS
- I'm able to save them 21 management hours and \$1,000 per month with a mobile app we've built for invoicing and inventory.
- Just wanted to connect with you to show you how it might work for your restaurant.
- You have a couple minutes to chat?

(You'll get 1 of 3 replies)

- Yes, follow below
- No, ask for a time to chat – 10 mins
- Screened

1) (Yes...)

- Great... as I said we've developed a mobile app for restaurants that updates the invoicing, accounting and inventory process.
- You know... The reality is that the mobile phone and apps have changed technology and how we do business...
- But what we see in the restaurant is still paper invoices, clipboards, spreadsheets, and a lot of manual processes
- We've developed a mobile app that is helping restaurants go paperless with their invoicing, automate their accounting, put price trends and spend in the palm of their hand AND make inventory painless with no spreadsheets, no data entry, and no price look up
- The result is that it is saving our clients 21 management hours per month – managing invoices, data entry and inventory... and saving them \$1,000 dollars in food spend through price trends and better purchasing.

- The purpose of my call is to schedule a demo to show you how this works...
- Do you have 30 minutes in the next day or so to take a look at this? [Link](#)

(Get ready for the no...)

- I can appreciate that...
- The easiest way to see if this is going to work for you is to take a 30 minute look
- For a 30 minute investment... we'll show you four things
- First, we'll teach you how to use our app to put an end to the paper invoices... it eliminates those lost invoices, double payments, missing credits, and storage for invoices
- Second, we'll show you how it scrapes the line item detail from all your invoices and prepares accounting reports for you... so it eliminates data entry for invoices and accounting
- Third, we'll show you how it puts all your food spend and the prices trends in the palm of your hand so you can see what's going on... how much you spend and what prices are doing on important ingredients... and we even send you push notifications when a price goes up
- The final thing we'll show you is how you can take inventory on a mobile app in 50% of the time... with no spreadsheets, no data entry, and no price look up.

- This is definitely something you want to know about.
- Basically we show you how you can use your phone and a mobile app to save some time and money on stuff you're already doing today
- How's Thurs or Fri look? (suggest a time)

(Get ready for the no...)

- I know how busy you are... and most my current clients felt the same way... I mean, some sales guy calls them up... And they don't really buy into the claim... but after I convinced them that this was something they couldn't miss just looking at... they were happy because it did help them save time and money on stuff they were already doing...
- It doesn't hurt to just take a look... mobile apps are doing some great stuff these days...

- And the easiest way to see if this is going to work for you is to take a 30 minute look
- For a 30 minute investment... I'll show you
- How you can use the free App to go totally paperless with your invoicing
- How you can put your accounting on autopilot
- How you can have all your supplier price trends in the palm of your hand
- How you can save thousands of dollars per quarter with a supplier CRM
- What's a good time this week? How's Thurs look? (suggest a time)
- Schedule time

That's awesome... I'm excited to show you how this works...

Hey, just so I can be prepared there's a couple questions I'd like to ask so I can get set up... just need 2 more minutes of your time.

Ask qualifying questions

2) Not interested... (I'm busy)

- Hey Chris, I get it... you're busy and if you're like my other customers you want to have more time to talk about things like this... but you've got your hands full
- Does that sound right?
- I thought so
- Is there a time I can schedule 10 minutes with you?

• **No, I'm not interested**

- When most of my restaurants have told me that in the past it's because they didn't think I could help them.
- After they agreed to take a look at it, they realized it saves them 21 management hours a month... so they can spend their time on stuff they need to be doing.
- That's the purpose of my call... is to schedule a time so I can show you how our simple mobile app is saving restaurants 21 hours a month and more than \$1,000 dollars...
- I mean you want to have 21 more hours for you and your managers on stuff you're already doing today, don't you?

THE OUTBOUND SCRIPT



Part of a 4 page call script with rebuttals. Seriously, script everything!

Discovery Has A Purpose



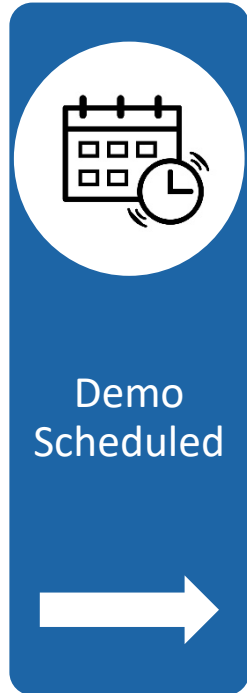
- To **qualify** a client and need, so our AEs don't show up and throw up
- So **we don't waste time**
- So the AEs have **a chance to make a sale** not just pitch to anyone
- To understand **the current situation, desired situation, the gap...** and to get them to **agree that they want to solve the gap**
- To **create excitement** about our product through understanding
- To get them to **acknowledge that there is a better way**
- **To provide a roadmap for a successful AE call and sale!**
- If you perform a poor discovery its unlikely we'll make a sale

Step 4: Demo Scheduled



Step 4 Process:

- **BDR schedules demo with prospect**
- BDR completes confirmation cadence
- BDR sends initial email with calendar confirmation
- BDR sends confirmation email day prior to call
- BDR leaves voice mail day prior to call
- BDR sends reminder email day of call
- BDR sends text day of call
- BDR leaves voice mail day of call
- BDR receives confirmation or removes demo from AE calendar



Demo Scheduled Cadence



Day 1 Day Demo is Booked	Day 2 Day before the scheduled demo	Day 3 Day of the Demo
(1) Demo Email 1	(2) Demo Email 2	(4) Demo Email 3
	(3) Call w/ VM	(5) Call w/ VM
		(6) Text Message 1

- **Demos complete is THE metric...** it's a key driver of sales
- **Show rate is one of our top problems...** 80% in our best months
- **Follow the demo scheduled cadence...** to follow after a demo has been scheduled
- **Cadence is 6x3...** double down on phone calls if you haven't confirmed the day prior
- **You must get a confirmation...** or take it off the AE calendar

Step 5: Sales Handoff



Step 5 Process:

- **Communicate prospect details and set AE up for success**
- Assign the lead to AE in CRM
- Schedule time to go over the prospect qualification criteria
- Discuss ANUM data and CRM notes
- Also share the lead source, dates, conversations, personal information you've collected
- Confirm any scheduled calls with both the prospect and AE
- Use meeting requests



The SDR & AE Handoff



- Do you have **notes in CRM** that cover ANUM+GCP?
- What is the **prospect most interested in solving**?
- What part of our solution did they **want to see**?
- Did the SDR complete **ANUM score card**?

Step 6: Pre-call Research



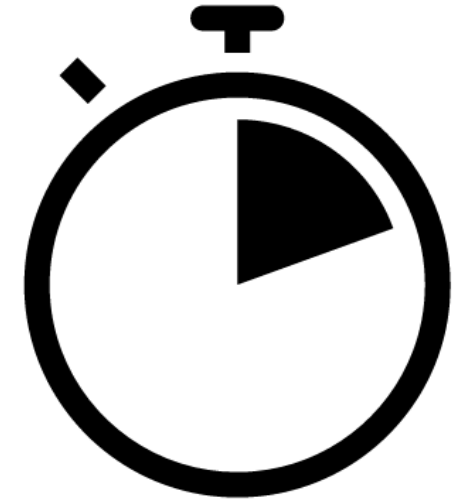
Step 6 Process:

- **AE must complete pre-call research**
- Follow 5 facts in 5 minutes
- Know the company and person
- Review discovery notes
- Complete handoff meeting with SDR
- Prepare deck and questions that tailor the pitch and make it personal
- Add your notes and thoughts to CRM

5 facts in under 5 minutes

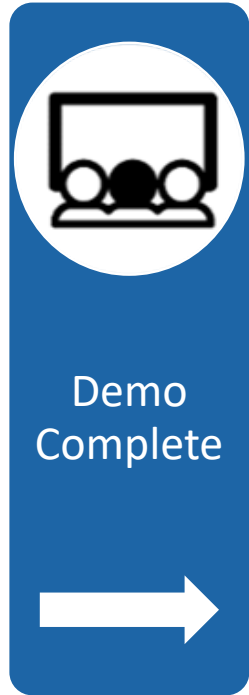


- 1) Have we talked to them before? When? Who? Outcome?
- 2) Who am I talking to? Title? Job? Tenure? Executive or Manager?
- 3) What pages and content did they consume from our website?
- 4) What are the company details? Years? Locations? How big will they potentially be? ICP?
- 5) What can I find personally on this person? Interests? Fun facts?



Approach (rapport) is the first sale. People buy from people they know, like, and trust. Know about your prospect so you can connect with meaning.

Step 7: Demo Complete



Step 7 Process:

- **Illustrate the benefits of our software in a smart and savvy way**
- Teach, tailor, and take control of the demo
- AE performs online meeting and demo
- Show how key features deliver value to clients
- AE identifies and gets agreement on specific value points for client
- AE schedule post demo follow up with client
- Add notes to CRM

2 Ways To Pitch:

1) Features Based Presentation (not good)

- Here's what we do...
- Here's how all the buttons work...
- What do you think?

2) Benefits Based Presentation (good)

- What interests you about what we do?...
- Why?...
- Tell me... how does that work for you today?
- So, if I could show you a better way to do that... and it was risk free... you'd probably want to try it...
- Ok... I'm going to spend the next hour showing you exactly how I can do that for you... how's that sound?



I did not include the pitch deck, but here's everything you need to know about pitch decks.

You Will ALWAYS Make A Sale



- If you **solve a problem**
 - Realize a gain
 - Solve a pain
- If you **focus on their needs**
 - Understand them and help them run a better business
- If you **deliver value beyond what they pay you**

Note: If you can't do these things you shouldn't attempt to close it

Some Rules



- Don't attempt to demo or “sell” until you **understand their process and pain**
- **Connect to their issue**
- **Do not show every feature!**
 - Only show the features they need to know about and bring value

Some More Rules



- **Follow a process**

- Approach
- Interview
- Demonstrate
- Validate
- Negotiate
- Close



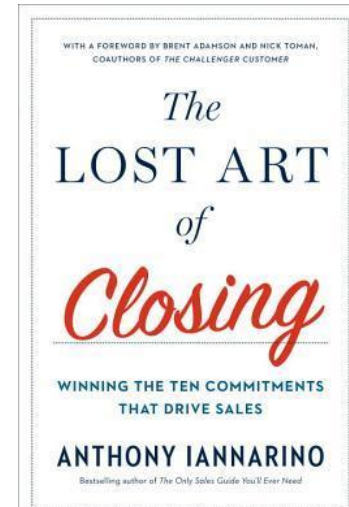
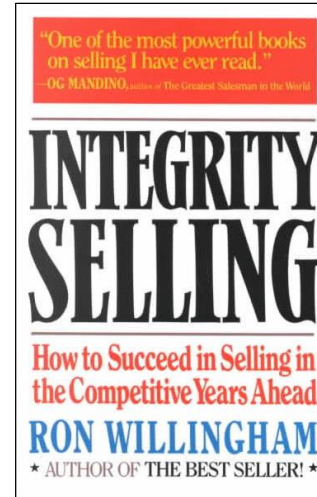
Current Situation
Desired Situation
Gap
Agreement on the Gap

- **Be a challenger**

- Teach
- Tailor
- Take control

- **Agreement on each of the 10 commitments**

- Most Important – commitment to change and for consensus
- Acknowledge dissonance

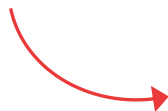


The World Has Changed...



- **Start with a BIG idea.**
- **Get them to agree there's been a change in the world**
- **Show how your solution fits into that change**
- **Look up: [The Greatest Sales Deck I've Ever Seen](#) by Zuora**

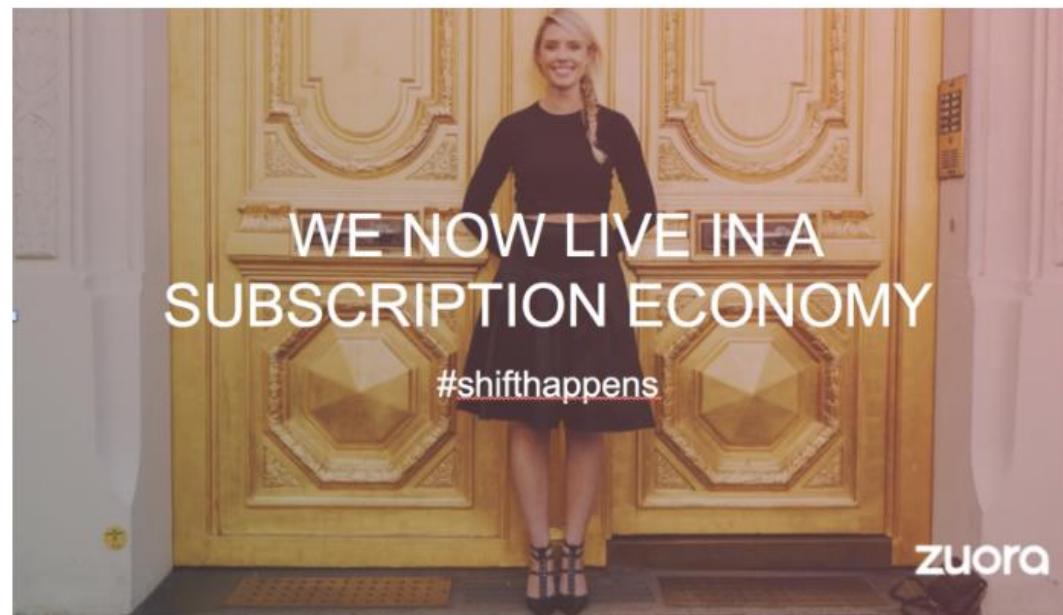
The greatest sales deck I've ever seen



#1. Name a Big, Relevant Change in the World

Don't kick off a sales presentation by talking about your product, your headquarters locations, your investors, your clients, or anything about yourself.

Instead, name the undeniable shift in the world that creates both (a) big stakes and (b) huge urgency for your prospect.



Some closing questions



- **What other questions or concerns do you have that we need to discuss before talking about next steps?**
- **At this point what have I failed to explain?**
- **Can I get you signed up, so you can start trying it today?**
- **Are you ok telling me “no”?**
(If they do ghost you... VM: remember when I asked you if you were ok telling me no... because this maybe or no response zone is killing me)
- **Do you clearly see how the benefits outweigh the costs?**
- **Do you need more evidence of the benefits?**

What if they say “no”?



- **Do you still want to solve the problem we discussed?**
- **Have I mis-interpreted your interest?**
- **Do you have a problem with the price?**
- **Are there questions that popped into your mind that we didn't discuss?**
- **What can I do at this point to best help you?**

Step 8: SQL / Non-SQL



Step 8 Process:

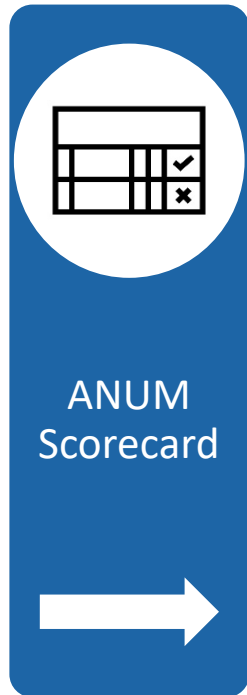
- **AE marks the lead as qualified (SQL or non-SQL)**
- A Sales Qualified Lead is one that has ANUM
- It is a company in the US that is solving for our problem, has expressed interest in our product and will make a buying decision in the next 6 months
- Post demo, the AE marks the lead SQL or non-SQL in the CRM
- Schedules time with the BDR for feedback

Step 9: ANUM Score Card



Step 9 Process:

- **Score the SDR on quality of the lead**
- Training & collaboration session on how to set up the best discovery calls for AEs
- Feedback loop for sales to train on better qualifications
- BDR completes ANUM Score Card and posts to CRM
- AE completes ANUM Score Card and posts to CRM by EOD after discovery call
- AE & BDR meet weekly to review leads and scorecards



ANUM Scorecard



ANUM Scorecard		
		Score
Authority	Is this persona a stakeholder? Who is the key decision maker? Who else is involved in the process? (1 - 3)	0
Need	How do they solve for our solution today? Do they use software today? Where do they hold the data today? (1 - 3)	
Urgency	Where are they in their process? What is their timeline to solve? What are their key challenges? (1 - 3)	
Money	Do they have budget allotted? Do they have an idea of what the costs will be? Whose budget is covering the project? Is procurement involved? (1 - 3)	
Plans	What are their company key goals in 2018? What are they striving to improve on in their business? (1 - 3)	
Goals	For your stakeholder: What are their key goals for the quarter and the year? This project?	
Challenges	What are the challenges in their business for the year? What trends and hurdles are they dealing with? (1 - 3)	
Score		

Step 10: Sell Across The Company



Step 10 Process:

- **Sell to all buyers and get agreement on benefits to each**
- Identify all decision makers
- Review checklist of buyers
 - Economic buyer, User buyer, Technical buyer, Coach, Decision Maker
- Demo to everyone
- Articulate benefits for each buyer
- Get buy-in from all parties
- Add notes to CRM in process



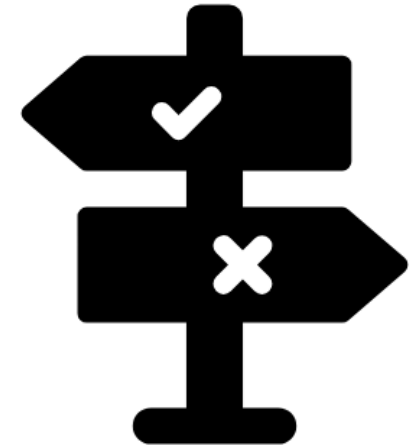
- **Great, in order to make this work we're going to need to bring in your partner/ operations manager / etc. and get their buy in... what I've seen is that if we don't involve them in the process they are likely to oppose it... can we schedule something with them this week to involve them in the process?**
- **Do you expect them to be supportive of this project? (if not, why not?)**
- **What happens if your partner says no?**
- **What will happen if this decision doesn't get made?**

Step 11: Close Won / Close Loss

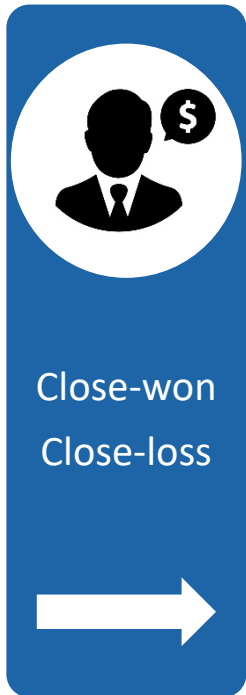


Step 11 Process:

- **Ask for a buying decision from prospect**
- Identify value and illustrate benefits to client
- Ask closing and follow up questions from training
- Add notes to CRM
- Mark as 'closed won' or 'closed lost' in CRM



- You have to ask for a decision... they WILL NOT close on their own
- Getting a “no” allows you to understand where you are... what you need to overcome



Step 12: Handoff to Onboarding



Step 12 Process:

- **Cement the sale with solid handoff to CSM team in 24 hours**
- Identify end result client is looking for and communicate to CSM
- Complete the Handoff Document
- Meet with the CSM and discuss the details
- Make the meeting face to face!



A solid hand off sets the tone for the customer relationship

Step 13: Expansion Follow Up



Step 13 Process:

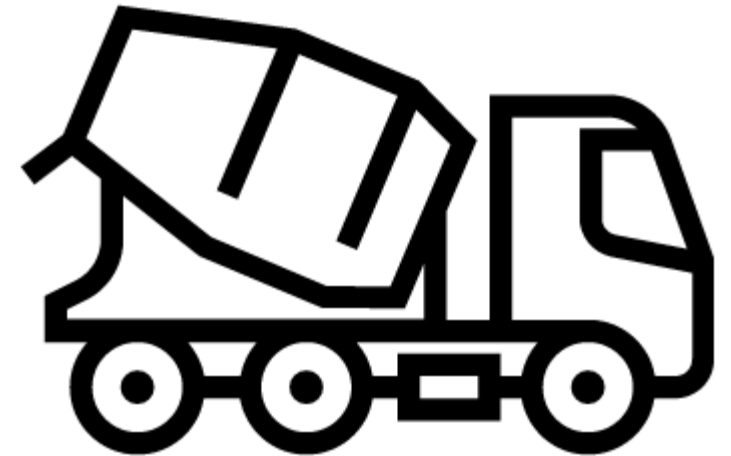
- Cement the sale with on going value
- Follow and **deliver on what you sold**
- Make client so happy they want to bring additional business and referrals to you
- Weekly follow up
- Account Review – look at the data
- Send content – use ebooks
- Make sure you deliver on goal they wanted



Cement The Sale



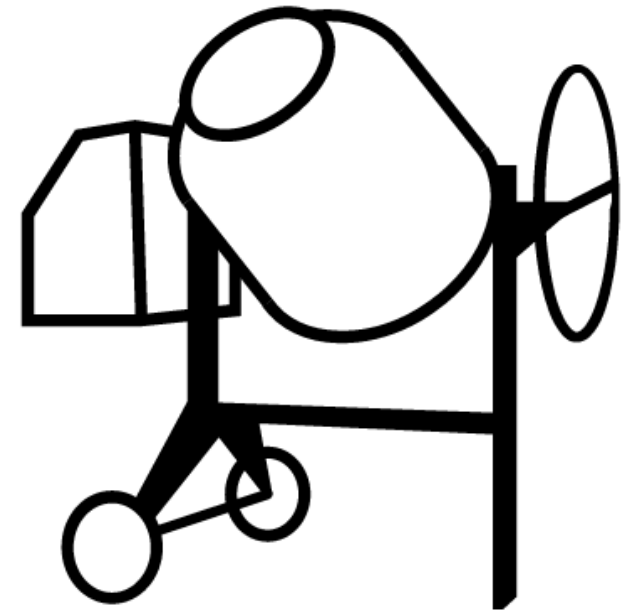
- **Deliver what we said... in 30 days**
 - Item 1...
 - Item 2...
 - Item 3...
 - Item 4...
- **Stay in contact... and build advocate**
- **Make them happy... and want to refer**



What is required?



- **Good handoff sheet**
 - In CS tool and CRM
- **Complete warm hand-off**
 - You meet with CSM and verbally go over the HO sheet
 - You get on the phone and make a personal introduction
- **Week 1 Check-in**
 - Look at account – data? stories? savings? value?
 - Did CSR meet 2x... what notes?
 - Are we seeing 1st steps of value?
 - Call and talk to customer about what you see relative to the goals

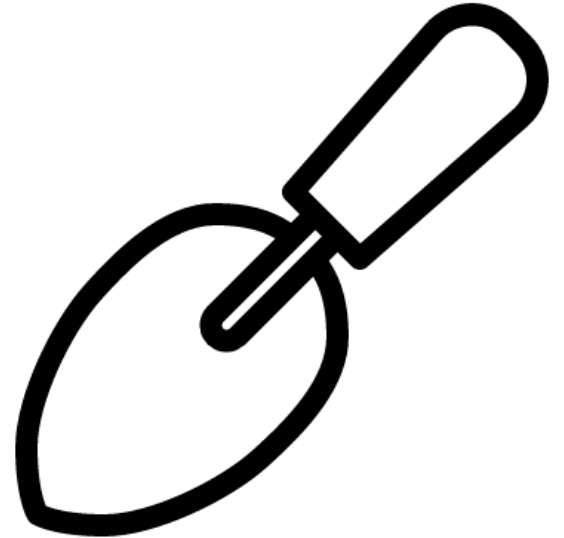


What's required? (Part 2)



- **Week 2 Check-in**

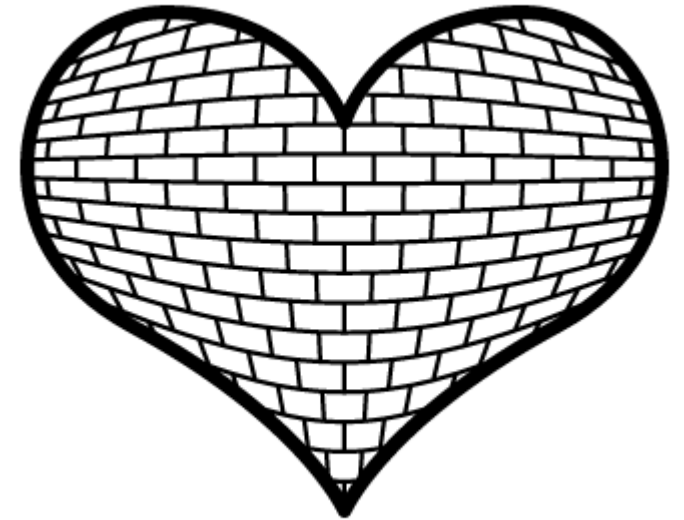
- Did CSR have meetings?
- Can we say we are 1/2 way to delivering promise?
- What needs to happen?
- **Call customer – discuss data and any issues**
- Share an article relative to their destination
- Show them how to set something up
- **Teach them high value tip on how to use the solution**



What's required? (Part 3)



- **Week 3 Check-in**
 - Did CSR have 6 meetings? Why not?
 - What do you see in there
 - Push on what we need to deliver
 - **Call customer and show them something**
- **Week 4 Check-in**
 - Did we deliver what we said?
 - Make sure they see value
 - **Get additional sites or ask for referral**



Step 14: Close Expansion Units

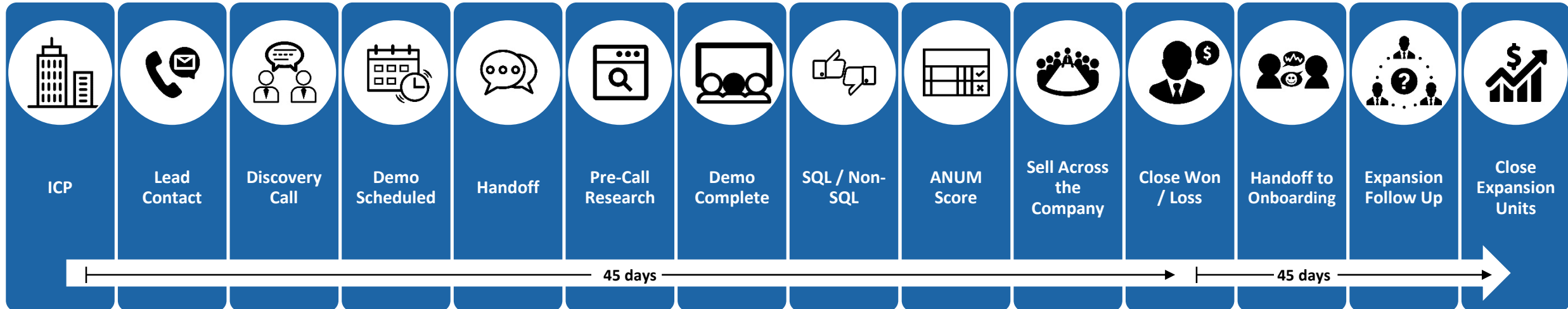


Step 14 Process:

- **Close additional business**
- Provide enough value that customer signs up for all services and refers friends
- Establish goals with client from start
- When we deliver X... then you'll want to look at expanding to the other locations...
- Put a time frame in place
- Continue to follow up weekly and deliver valuable information about their account and the business
- Ask for a decision when appropriate



Sales Process & Playbook (14 steps)



- **14 steps** that act as a Roadmap to closing deal
- Each step has a very **specific purpose**
- **Preparation** for each step is essential for success
- Prospect **feedback & agreement** is necessary
- Add stages to CRM and assign close value to each stage
- Lead > prospect > opportunity > closed won /closed lost / nurture

Be clear on the customer acquisition process with a detailed process and playbook. And share it. The entire team should know how you acquire new customers.

Playbook Summary



- **Commitment to this process** makes us professionals – strategic sellers
- **It's not a real opportunity** if someone doesn't want to go through the process...
- **Most important stages** – discovery, demo, selling across the organization
- **Challenge your prospects** through questioning... call out the white elephant (status quo, timelines, audiences)... be real
- **Follow the process...** it will lead to greater success

PART 3



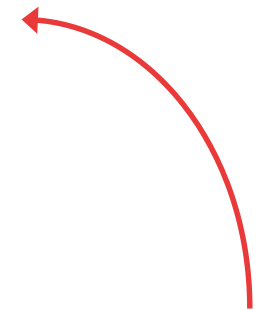
METRICS, REPORTING & TRAINING

A breakdown of the KPIs and a list of helpful resources

SALES & MARKETING FLASH (Weekly)



	Actual	Pace	Goal	%	Status
MQLs	-	-	-	%	○
New App	-	-	-	%	○
Demos	-	-	-	%	○
SQLs	-	-	-	%	○
Paid	-	-	-	%	○
MRR	\$	\$	\$	%	○



A daily flash update for the whole company showing key targets and pace. This can be done via a leaderboard as well.

SDR Waterfall Metric Report



	Calls	MQLs	Connect Rate	Connects	Connect Conversion Rate	SDR Qualification Calls	Qualification Conversion Rate	Sales Handoff	SQL Conversion Rate	SQLs	New Oppty	Funnel \$	Paid \$
Goal	1,200	200	50%	100	40%	40	50%	20	90%	18	18	\$\$\$K	\$\$\$\$K
Rep 1													-
Rep 2													-
Rep 3													-
Total		200	50%	100	40%	40	50%	20	90%	18	18	\$	\$

Hustle quotient

Pitch quality

Objection handling

Lead quality

Lead efficiency: % (MQL to SQL)

New Opportunities:
Pipeline:
Prospect ACV:

SDR Conversion Indicators



How well does an SDR handle leads?

- **Connect rate** = hustle quotient
- **Connect conversion** = pitch quality
- **Discovery conversion** = needs analysis
- **SQL conversion** = lead quality
- **Lead efficiency** = overall score (good rep is 20%)



Measure these for the rep and the team. It will provide benchmarks on where reps should be. It will highlight where you need team and individual training.

Make it a math equation



- **Measure for team and rep**
 - Create benchmarks and standards

- **The big 4 metrics**

- 1) Funnel
- 2) ACV
- 3) Close rate
- 4) Sales cycle

- **Understand sales velocity**

The diagram illustrates the sales velocity equation as a fraction. The numerator consists of three terms: a large black hash symbol (#), a large black dollar sign (\$), and a large black percent sign (%), separated by 'x' symbols. Handwritten teal text with arrows points to each term: 'Number of sales opportunities you work' points to the #, 'Average deal value' points to the \$, and 'Win rate' points to the %. A horizontal line separates the numerator from the denominator, which is a large black 'L' shape. A handwritten teal arrow points from the text 'Length of sales cycle' to the 'L'.

$$\frac{\# \times \$ \times \%}{L}$$



AE Sales Metrics



- Demos Scheduled - # / sources
- Demos Complete - # / sources / show rate
- SQLs - # / avg score
- Pipeline / Funnel - new / by stage
- Close rate - W/L by stage / rep
- Sales Cycle
- New Accounts
- MRR Bookings
- ACV
- Discounts

Create stack rankings and a visible leaderboard



Measure weekly, monthly and YTD metrics by team and rep. Understanding benchmarks and conversion rates makes it scalable and repeatable

The Sales Training Curriculum



- 1) HR Paperwork
- 2) Meet the team – DEV, Data Services, Onboarding, Marketing, Sales
- 3) Facilities – PC, Email, CRM, Hubspot, Ring Central, Join.me, calendars
- 4) Daily Demos
- 5) Daily Role Play
- 6) BDR / BDM Purpose & Goal
- 7) 10 Things To Be Successful
- 8) Sales Playbook – the process for lead generation
- 9) Ideal Customer Profile
- 10) Cold Call Script
- 11) Common Objections
- 12) 10 Questions to Ask – Discovery Questions
- 13) ANUM Scorecard
- 14) IB Lead Process
- 15) Social Selling
- 16) Core Story – the AE deck
- 17) Sales Stack
- 18) Sales Widgets
- 19) User Registration Process
- 20) Handoff process
- 21) Products & Pricing
- 22) CRM training
- 23) Hubspot Sales Training
- 24) Time management
- 25) Selling to different buyer types
- 26) Commission Plan
- 27) Company History
- 28) Website walk through
- 29) Landscape & Competition
- 30) Core Values
- 31) List of Influencers
- 32) Meetings & Communications
- 33) 1:1 process & reports
- 34) Weekly sales update
- 35) Personal plan
- 36) Predictable Revenue



New reps had to complete 36 training sessions before they went live. Training was completed by VP, Director and team.

Sales Links & Resources (Maybe the most important page in this book)



Sales Leaders to Follow:

[Tony J Hughes](#)
[Anthony Iannarino](#)
[Jeffrey Gitomer](#)
[Jason Lempkin](#)
[Aaron Ross](#)
[John Barrows](#)
[Rob Jeppsen](#)
[Max Altschuler](#)
[Ralph Barsi](#)
[Kyle Porter](#)
[Craig Rosenberg](#)
[Steve Richard](#)

Business Leaders & Brands to Follow:

[Ben Horowitz](#)
[Marc Andreessen](#)
[Brad Feld](#)
[Peter Thiel](#)
[Sean Ellis](#)
[Kevin Rose](#)
[GigaOm](#)
[SaaStr](#)
[Tech Crunch](#)
[Mashable](#)

Books To Read With Your Sales Team:

[Predictable Revenue](#)
[Integrity Selling](#)
[The Joshua Principle](#)
[The Lost Art of Closing](#)
[The Challenger Sale](#)
[The Sales Acceleration Formula](#)
[Impossible To Inevitable](#)
[Saleshood](#)
[The Hard Things About The Hard Things](#)
[Zero To One](#)
[Delivering Happiness](#)
[The War of Art](#)
[Anything You Want](#)

Personal Improvement Leaders to Follow:

[Tony Robbins](#)
[Lewis Howes](#)
[Tim Ferriss](#)
[Jack Canfield](#)
[Michael Hyatt](#)
[Robert Greene](#)
[James Altucher](#)

Marketing Leaders to Follow:

[Jay Baer](#)
[Neil Patel](#)
[Larry Kim](#)
[Rick Mulready](#)
[Growth Hackers](#)
[Ryan Holiday](#)
[Rand Fishkin](#)
[Jeff Walker](#)
[Joe Polish](#)
[Noah Kagan](#)
[Pat Flynn](#)
[Derek Halpern](#)
[Gary Vaynerchuck](#)
[Seth Godin](#)
[Chad White](#)
[John Jantsch](#)
[Scott Brinker](#)
[Ann Handley](#)
[Chase Jarvis](#)

**The fountain of knowledge:
A simple way to hack your
growth is by following and
listening to the top people
in your field. Here is a short
list of some of my favorite
leaders to follow.**



Questions



For questions, contact:

Tim Muenchen
tim@timmuenchen.com
404-432-0359

