



# How to master time management as a sales leader



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**Why is managing your time so important as a sales leader?**

## Setting up your plan/strategy

- Recipe card – what does the 'path to success' look like?
- Key metrics that people can use to influence the path to success
  - Increase ASP
  - Increase win rate
  - Generate more opps than plan to protect from win rate / asp drop

Model based on Q4 Actuals + H1 Operating Model (Need 20 opps/quarter)					
	IB / PGL	OB SDR	OB AE	Partner	Total
Meeting -> Opp CVR	75%	52%	60%	N/A	
Meetings Needed	8	11	10	4	29
Count Opps	6	6	6	2	20
Win Rate (s2)					25%
ASP					\$40,000
Revenue					\$200k / quarter


## Show them what good looks like

- How to prospect – messaging, accounts, number of contacts, persona-based messages
- Running a first meeting
- Running the demo
- Negotiating/pricing
- Ops/systems



## Operating cadence

- Forecasting strategy and regs
- Enablement plan
- Pipe Generation (PG) campaigns with marketing – PG kits
- Talent development and recruiting
- Winning culture – celebrating wins / sharing knowledge across the team, learning from mistakes

A	B	C	D	E	F	G	H	I	J	K
<b>Q3 PG Campaign Kits</b>										
										
Week	Date	Theme	Goal	OWNER	Sales Owner	Sales assets	Marketing Owner	Marketing assets	RevOps owner	RevOps assets
1	7/1/2023	Vertical focus: Healthcare new regulation education and teardown offer	Break into healthcare accounts with our updates value prop based on X new regulation	Jim Davis	Jim Davis	1. Sales cadence 2. Call script 3. Messaging training	Adrian Kim	1. Healthcare specific pitch deck 2. Example MAP 3. New healthcare case study video	Dan Scott	1. Target account list by SDR/AE 2. Enriched contact info for all target accounts 3. Specific dashboard to track progress
2	7/8/2023			Jim Davis	Jim Davis		Adrian Kim		Dan Scott	
3	7/15/2023			Jim Davis	Jim Davis		Adrian Kim		Dan Scott	
4	7/22/2023	Competitive Ripout -- New feature makes Company X vulnerable	Displace cometitor = hypothesis is new feature increases our chances	Mary Mathis	Scott Gold	1. Sales cadence 2. Call script 3. Key customers who have switched	Mary Mathis	1. New Case Study 2. Competitive slides for pitch deck	Kait Kelly	1. Target account list by SDR/AE 2. Enriched contact info for all target accounts 3. Specific dashboard to track progress
5	7/29/2023			Mary Mathis	Scott Gold		Mary Mathis		Kait Kelly	
6	8/5/2023	X product release - closed/lost revival + and "do nothin" blitz	Revive lost opps -- big product release can compel people who have previously passes	Dan Scott	Jim Davis	1. Sales cadence 2. Call script 3. Messaging training	Adrian Kim	1. New product video 2. Updated demo script	Dan Scott	1. Target account list by SDR/AE 2. Enriched contact info for all target accounts 3. Specific dashboard to track progress
7	8/12/2023			Dan Scott	Jim Davis		Adrian Kim		Dan Scott	
8	8/19/2023			Dan Scott	Jim Davis		Adrian Kim		Dan Scott	
9	8/26/2023	Previous Buyers + Champion Push	Focus efforts on people who are already familiar with our offering.	Todd Segal	Todd Segal	1. Sales cadence 2. Call script	Mary Mathis	1. 2 versions of deck based on ATL/BTL 2. Updated customer stories for multiple time buyers showing personal wins at new company	Dan Scott	1. Target account list by SDR/AE 2. Enriched contact info for all target accounts 3. Specific dashboard to track progress
10	9/2/2023			Todd Segal	Todd Segal		Mary Mathis		Dan Scott	
11	9/9/2023			Todd Segal	Todd Segal		Mary Mathis		Dan Scott	
12	9/16/2023	Keynote event and subsequent webinar -- all key accounts		Mary Ruff	Scott Gold	Marketing owns	Mary Ruff	1. Offers for top accounts (free hotel, promotion) 2. Details of sponsorships 3. Success from previous attendees	Kait Kelly	1. Target account list by SDR/AE 2. Enriched contact info for all target accounts 3. Specific dashboard to track progress
13	9/23/2023			Mary Ruff	Scott Gold		Mary Ruff		Kait Kelly	

# Operating cadence example - Sales manager level



Cadence	WK1	WK2	WK3	WK4	WK5	WK6	WK7	WK8	WK9	WK10	WK11	WK12	WK13
Weekly Team Mtg w/Extended Team	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
AE 1:1- Forecast/CQ Lightweight Deal Coaching (Use 1:1 Doc)	✓		✓		✓		✓		✓		✓		
AE 1:1- Pipeline/Activity KPI Review		✓		✓		✓		✓		✓		✓	
<del>AE 1:1- Target Account Plan Coaching</del>	<del>✓</del>				<del>✓</del>				<del>✓</del>				
<a href="#">AE 1:1- Skills/Career Planning</a>			✓				✓				✓		
Monthly -CoM Opp Review -- 45 min, once / rep / month			✓				✓				✓		





Questions

