

 Pavilion

ELEVATE

Q2 RKO

Re Kick-Off

Welcome & Future of Pavilion

Sam Jacobs, CEO & Founder



Pavilion

- The average tenure of a C-suite executive is **18 months**
- **Executives are the foundation** of a company's success
- We are here to **help go-to-market leaders** achieve their professional potential
- Now more than ever **we must band together** to navigate this uncertain environment

Learn



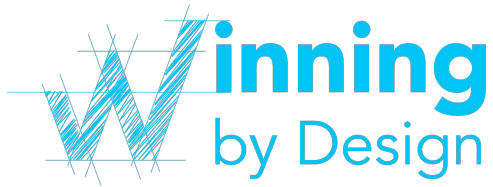
10 On-Demand courses now available

- CRO School
- CMO School
- Enterprise GTM School
- Executive Compensation & Negotiation
- Creating & Implementing a Sales Playbook that Sticks
- Forecasting
- Intro to RevOps
- MEDDIC for Sellers
- Product Marketing Fundamentals
- SaaS Metric Fundamentals
- The Role of a Leader

Partnerships

Access to the best

Revenue Generation



Investors



Leadership Education



Analysts




Community & Connection


Pavilion

- 2023 Flagship Events:
 - CRO Summit in London in June
 - GTM2023 in Nashville in October
- Salon Dinners:
 - More events are in the works thanks to our partnership with Voray
- Host your own PavilionX event
- Bringing Chapters back: **AMA Thursday, May 18th at 9:30 ET**

Pavilion Digital

Beta

**Pavilion Digital**
Beta

Welcome, Linda!  Linda Jones

[Home](#)
[Pavilion University](#)
[Events](#)
[Knowledge Base](#)
[Member Directory](#)
[Resources](#)

CRD Summit 2023


Join the leading revenue minds to strategize how you can drive revenue through your marketing efforts in a tough economy.

[Register Now](#)

Register for an Event

Join in an exclusive events and meet like-minded members and grow your network!

[Browse Events](#)




Take a Course or Enroll in a School

Pavilion University leverages a proprietary Immersive Learning Framework to fuse structured training with ongoing social learning and just-in-time resources that drive results. Community-powered learning backed by Docebo®

[Browse Course Catalog](#)

Featured Courses




Sales Development School

Opened to Pavilion Members with an Annual Membership

📅 Program Starts: October 12, 2022

🕒 Application Due: September 28, 2022

[Learn More](#)




Sales Development School

Opened to Pavilion Members with an Annual Membership

📅 Program Starts: October 12, 2022

🕒 Application Due: September 28, 2022

[Learn More](#)



Sales Development School

Opened to Pavilion Members with an Annual Membership


📅 Program Starts: October 12, 2022

🕒 Application Due: September 28, 2022

[Learn More](#)

Featured Insights


[See More](#)



June 16, 2022

How to Talk about Mental Health at Work


[Read article](#)



June 16, 2022

How to Fundraise During a Recession


[Read article](#)



June 16, 2022

How to Build a Data Practice

[Read article](#)



Pavilion is up to something exciting

We have amazing plans for Pavilion Digital: this is only the beginning. Want to help improve our product? Click below to share feedback or participate in user testing. We'd love to hear from you.

[Submit Feedback](#)
[Sign up for user testing](#)



Pavilion

- We're here to support you and **help you thrive**
- Share your best insights on LinkedIn using our hashtag #ElevateRKO to receive **2 free tickets to GTM2023**
- Today only, **join or renew for 2 years** and get 35% off your Annual Membership plus 1 ticket to GTM2023

Fireside Chat

**Sweet Spot in the Eye of the Storm:
Driving Sustainable Growth
in B2B SaaS**



**Jacco van
der Kooij**

CEO & Founder,
Winning By Design

**Sam
Jacobs**

Founder & CEO
Pavilion



The Sweet Spot in the Eye of the Storm

Re-KO Pavilion, May 4, 2023

Jacco van der Kooij

Founder, Winning by Design

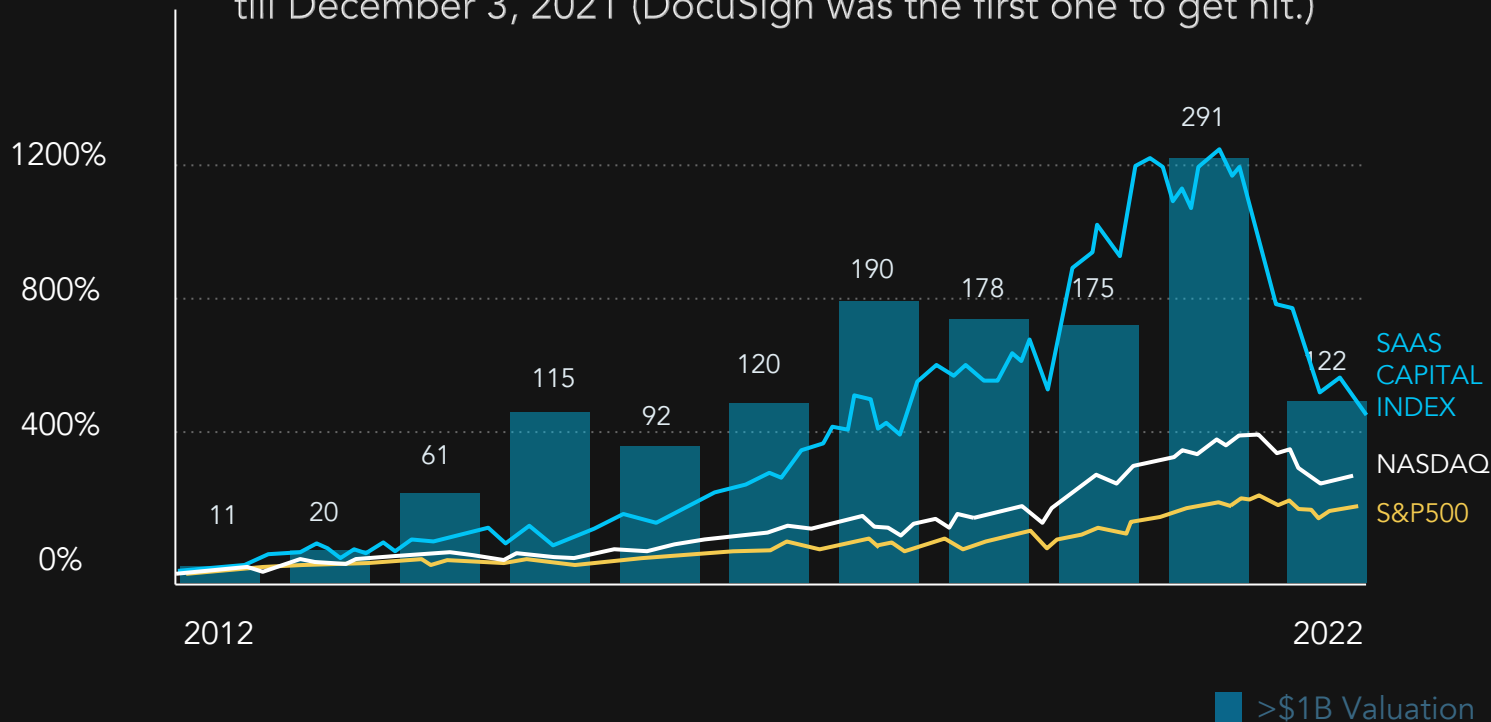


“ *At WbD we Delve into the Latest Trends and Design Strategies that Shape the Future of Recurring Revenue.*

- Founded in 2012.
- With a focus on B2B, Recurring Revenue, and GTM.
- Consulting: Science, Data, and Design.
- Training: Process, Passion, and Practical Expertise.
- 600+ Customers, 50+ Hyper Growth.

The Golden Age Followed by a Renaissance

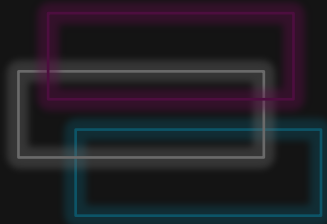
The decade from August 20, 2011 ("Software is eating the world") till December 3, 2021 (DocuSign was the first one to get hit.)





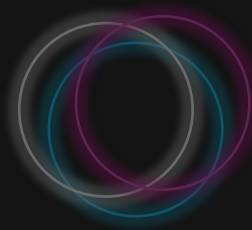
SITUATION

Why are we here,
how did this happen?



STRATEGY

What do we need
to do differently.



ACTION

What we can be
done right away.

SITUATION WHAT YOU WILL LEARN

▶ What is GTM 🙏

▶ Role of GTM 👍

▶ The Problem 🤯

▶ The Solution 😲

WHAT IS GTM?

A combination of all departments, functions, tools, means and methods aimed at establishing recurring revenue growth.



WHAT IS THE ROLE OF GTM?

As the revenue grows, processes should be installed to create more growth, with better outcomes, in a more cost-efficient way.

▶ Create Revenue Growth *Do More*

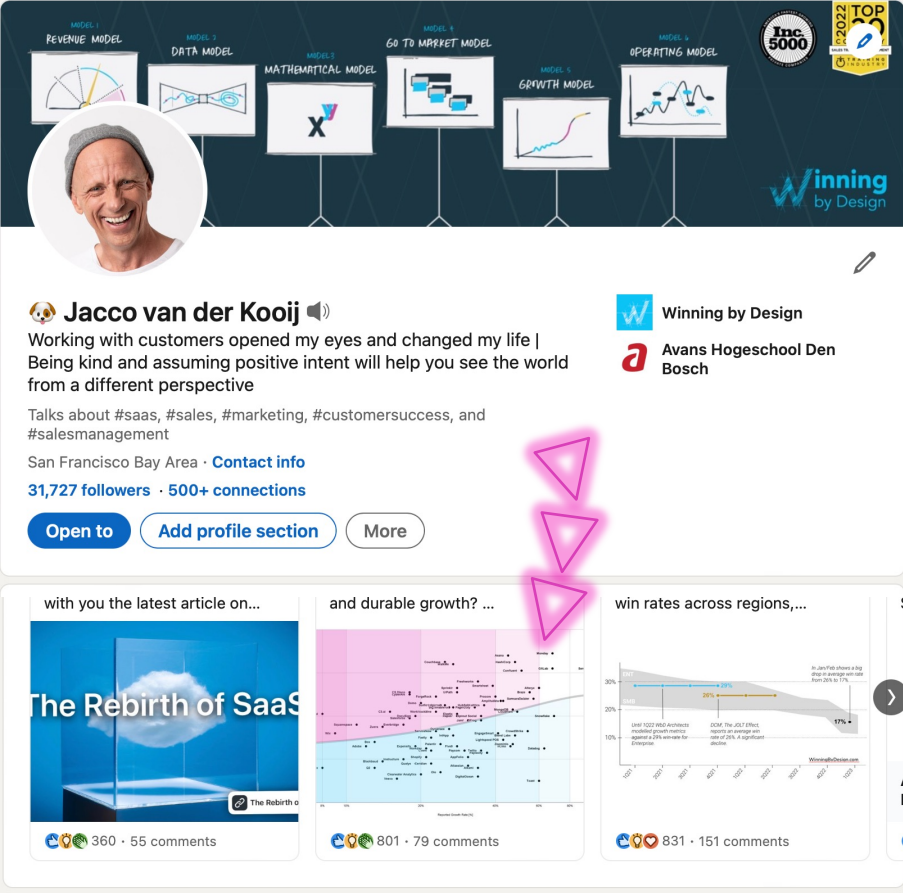
▶ Improve Customer Outcomes *Do Better*

▶ Lower the Cost *Do it Cheaper.*


THE PROBLEM

If you go to my LinkedIn page you can find relevant articles on this topic in my featured section.

- Rebirth of SaaS
- Durable Growth
- Impact on win-rates
- Sweet Spot in the Eye of the Storm



The image shows a LinkedIn profile for Jacco van der Kooij. The header features a banner with a sequence of six models: Revenue Model, Data Model, Mathematical Model, Go to Market Model, Growth Model, and Operating Model. A circular profile picture of Jacco van der Kooij is on the left. The profile name is 'Jacco van der Kooij' with a speaker icon. The bio reads: 'Working with customers opened my eyes and changed my life | Being kind and assuming positive intent will help you see the world from a different perspective'. Below the bio, it says 'Talks about #saas, #sales, #marketing, #customersuccess, and #salesmanagement'. The location is 'San Francisco Bay Area' and there is a 'Contact info' link. The follower count is '31,727 followers' and the connection count is '500+ connections'. There are three buttons: 'Open to', 'Add profile section', and 'More'. To the right of the profile, there is a 'Winning by Design' logo and a red 'a' logo for 'Avans Hogeschool Den Bosch'. Below the profile, there are three featured articles. The first article is 'The Rebirth of SaaS' with a blue and white image and 360 likes and 55 comments. The second article is 'and durable growth?' with a scatter plot image and 801 likes and 79 comments. The third article is 'win rates across regions,...' with a line graph image and 831 likes and 151 comments. Three pink arrows point from the bio area towards the featured articles.

Jacco van der Kooij 

Working with customers opened my eyes and changed my life |
Being kind and assuming positive intent will help you see the world
from a different perspective

Talks about #saas, #sales, #marketing, #customersuccess, and
#salesmanagement

San Francisco Bay Area · [Contact info](#)
31,727 followers · **500+ connections**

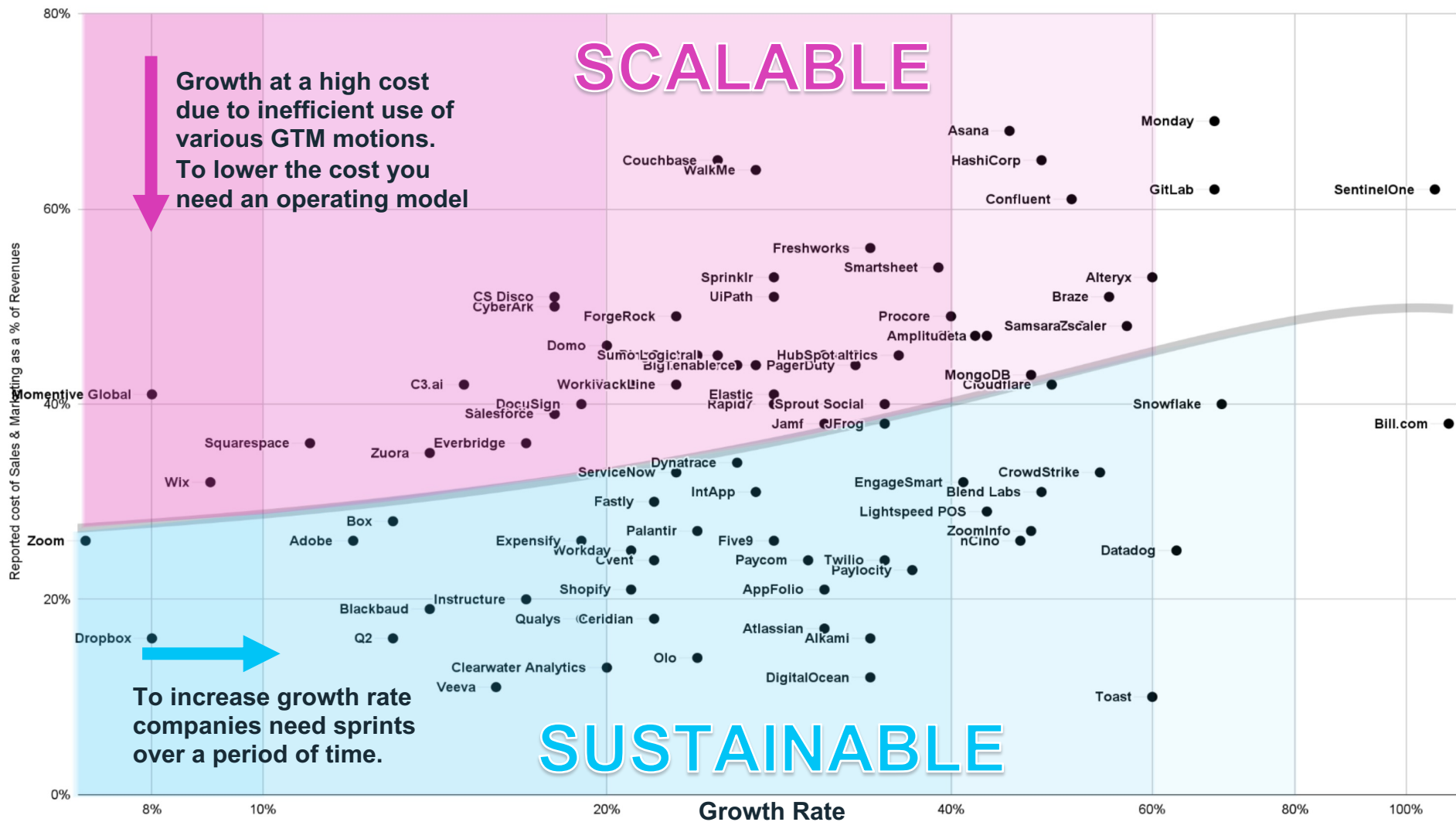
[Open to](#) [Add profile section](#) [More](#)

Winning by Design
Avans Hogeschool Den Bosch

with you the latest article on...
The Rebirth of SaaS
360 · 55 comments

and durable growth? ...
and durable growth?
801 · 79 comments

win rates across regions,...
win rates across regions,...
831 · 151 comments



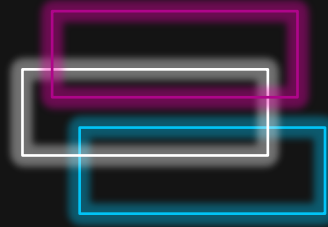
SITUATION WHAT YOU HAVE LEARNED

- ▶ GTM = Marketing + Sales + Customer Success.
- ▶ Role of GTM: ↑ Growth, ↑ Quality, and ↓ Cost
- ▶ The problem: ↓ Growth, ↓ Quality, and ↑ Cost
- ▶ To solve this we need to change!



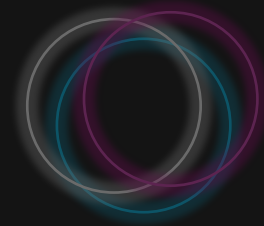
SITUATION

Why are we here,
how did this happen?



STRATEGY

What do we need
to do differently.



ACTION

What we can be
done right away.

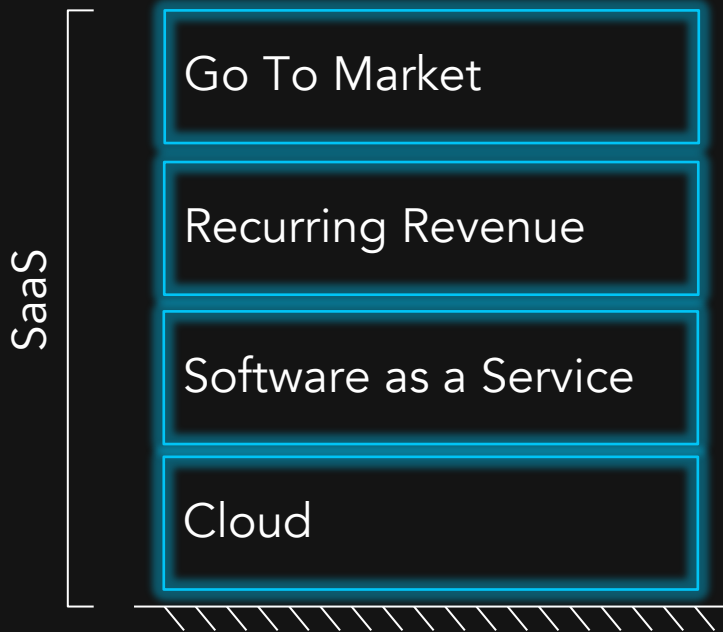
STRATEGY WHAT YOU WILL LEARN

- ❑ The Protagonist of the Next Decade is GTM
- ❑ Where it all went Awry: The Lack of an Operating Model
- ❑ How do we Fix this?
- ❑ Imperative for Growth.

THE PROTAGONIST

For the past decade, we primarily thought of SaaS and Cloud as the key pieces of software as a service (SaaS). But in reality, there are two other fundamental pieces vital to a healthy SaaS solution:

- 1) recurring revenue as the financial model, and
- 2) The high-velocity, technology-aided go-to-market (GTM) motions



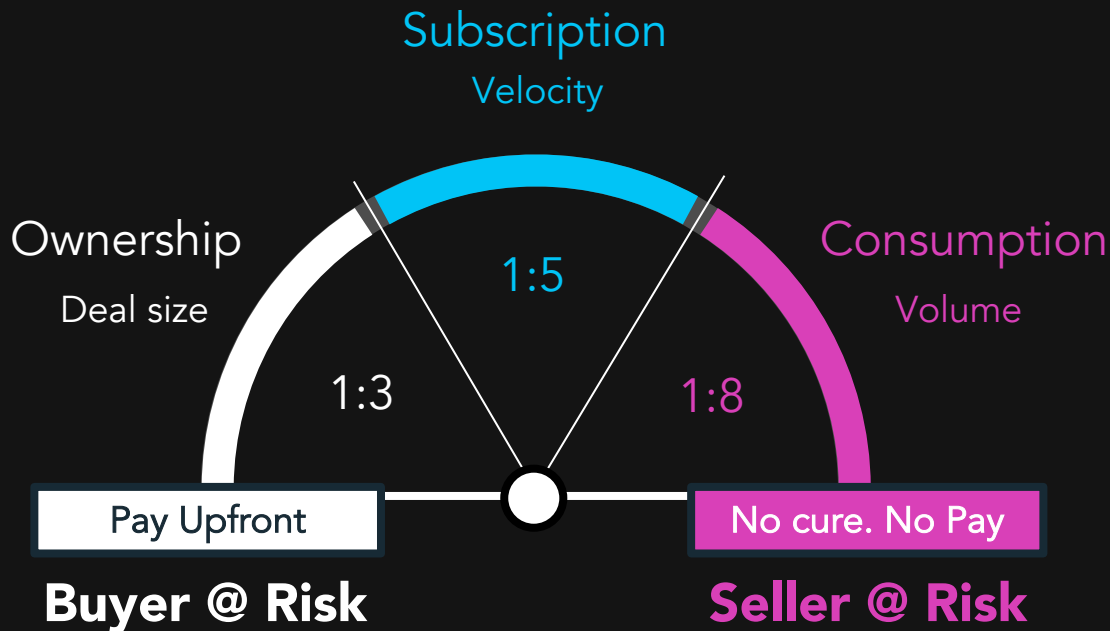
When we double-click on the go-to-market (GTM) motion, we can see that it can be divided into individual functions that layer on top of each other and interact with each other. By understanding how each layer works we can develop a highly effective and efficient GTM motion.

6	GTM Layer
5	Growth Layer
4	Operating Layer
3	Mathematical Layer
2	Data Layer
1	Revenue Layer



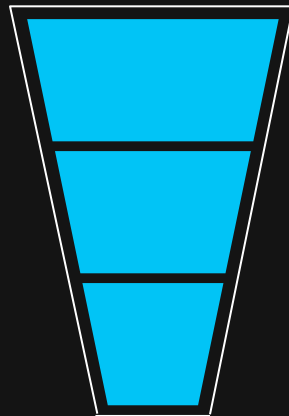
6	GTM Layer
5	Growth Layer
4	Operating Layer
3	Mathematical Layer
2	Data Layer
1	Revenue Layer

Most recurring revenue businesses are not leveraging the high performance growth engine of SaaS correctly as they are based on the fundamentals of a perpetual growth engine, which is based on a very different approach.



6	GTM Layer
5	Growth Layer
4	Operating Layer
3	Mathematical Layer
2	Data Layer
1	Revenue Layer

Many SaaS businesses use the Marketing and Sales funnel to report progress. The recurring revenue takes place outside the purview of the funnel and as a result this provides an incomplete picture, resulting in the wrong actions.

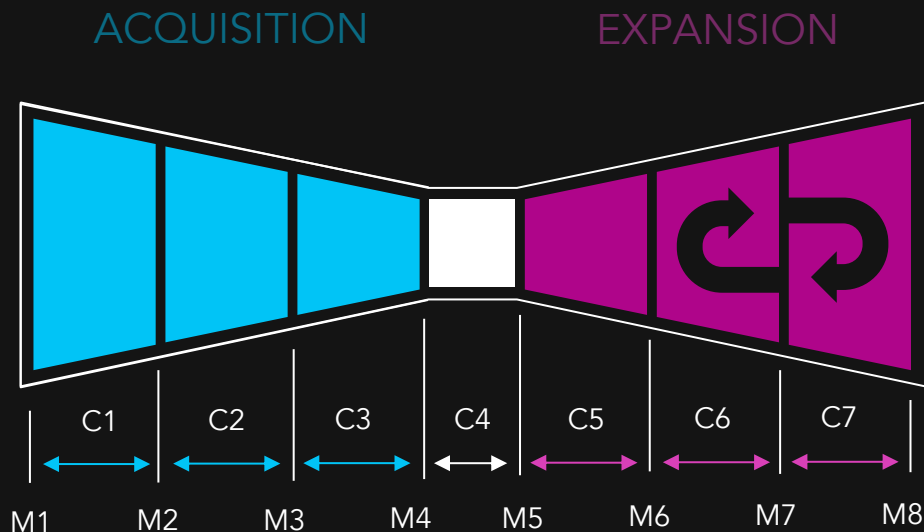


- Acquisition focused
- Linear Mindset
- Need for More
- Churn (Don't Lose)
- NPS Score (Me Tour)

The Bowtie

Covers the entire customer journey, most importantly where the recurring revenue occurs.

6	GTM Layer
5	Growth Layer
4	Operating Layer
3	Mathematical Layer
2	Data Layer
1	Revenue Layer



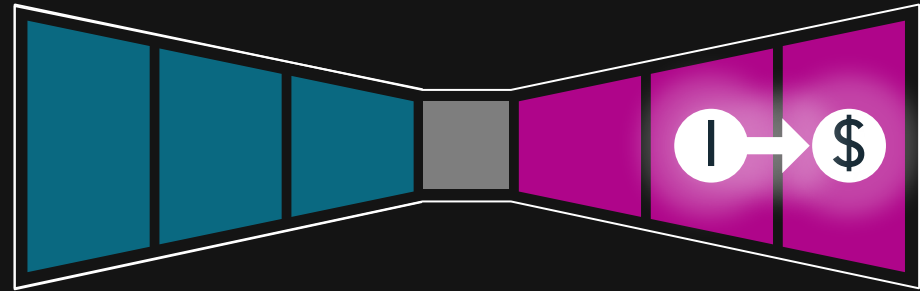
The Bowtie

6	GTM Layer
5	Growth Layer
4	Operating Layer
3	Mathematical Layer
2	Data Layer
1	Revenue Layer



ACQUISITION

EXPANSION



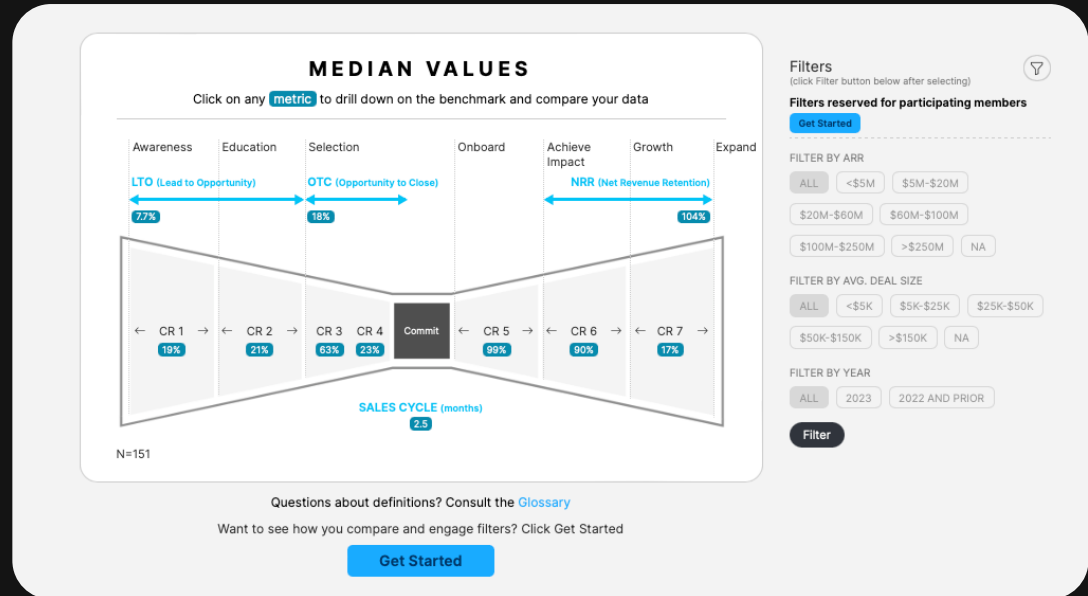
This shows the recurring revenue is based on a new growth principle, where growth comes from both Acquisition AND Expansion.

Recurring Revenue
is the result of
Recurring Impact.

Realtime Data

You can go to www.benchsights.com/wbd and get access to real-time data. You can compare yourself (anonymously) against peers in the industry

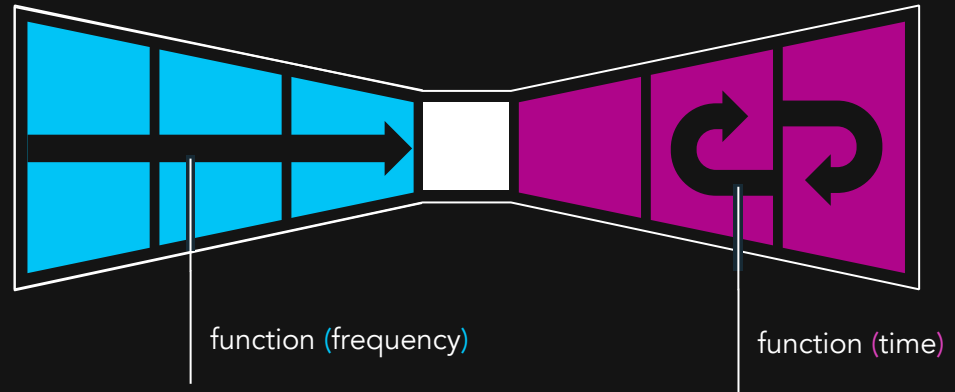
6	GTM Layer
5	Growth Layer
4	Operating Layer
3	Mathematical Layer
2	Data Layer
1	Revenue Layer



Different Mathematical Domains

Acquisition and Expansion work very differently, this explains why acquisition sales people can cause so much damage when used for expansion, but also why you need to design growth. You can no longer expect to just burn money until you figure it out.

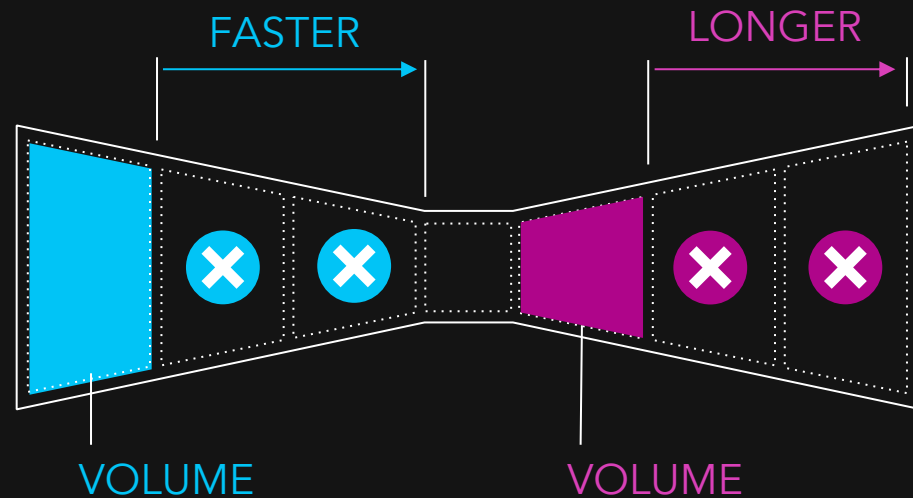
6	GTM Layer
5	Growth Layer
4	Operating Layer
3	Mathematical Layer
2	Data Layer
1	Revenue Layer



Exponential
relationship.
High repetition

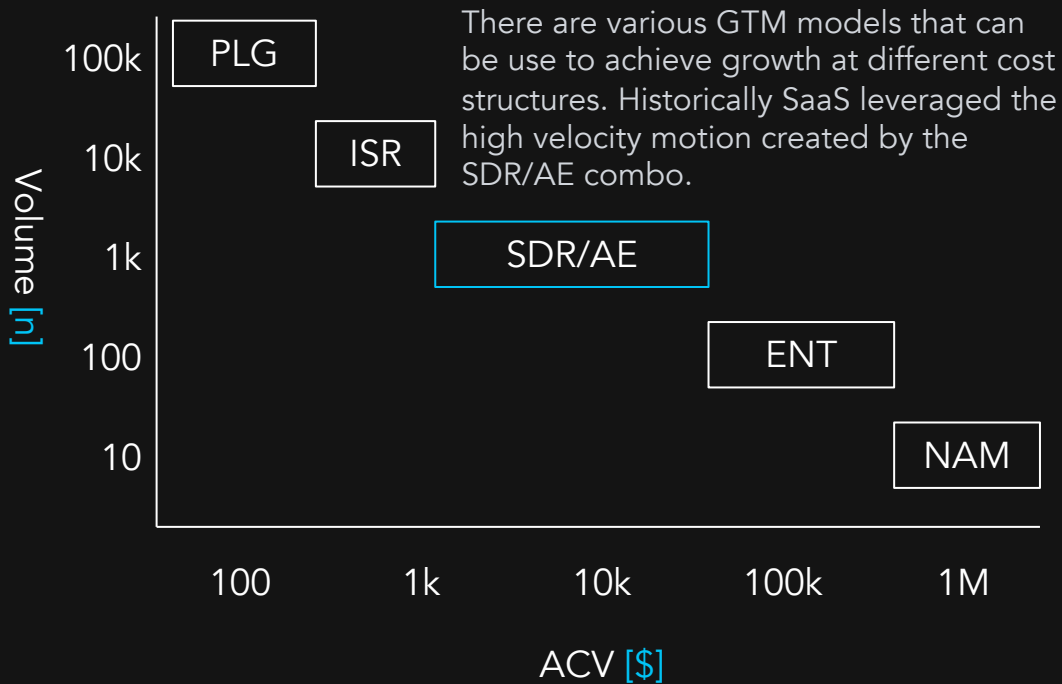
Compound
relationship
Repeats itself over time.

6	GTM Layer
5	Growth Layer
4	Operating Layer
3	Mathematical Layer
2	Data Layer
1	Revenue Layer



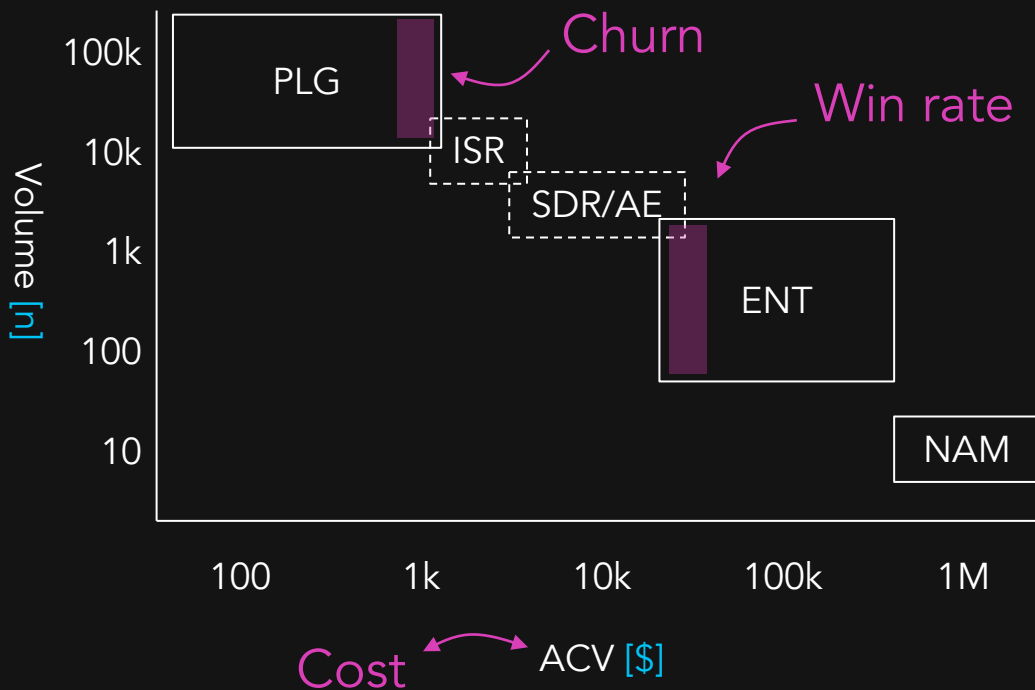
Both acquisition and expansion tap into different reservoirs. Acquisition taps into leads, and Expansion into customers. Both have conversion rates. In Acquisition we want it to go faster, while in Expansion we want the customer to stay longer.

6	GTM Layer
5	Growth Layer
4	Operating Layer
3	Mathematical Layer
2	Data Layer
1	Revenue Layer



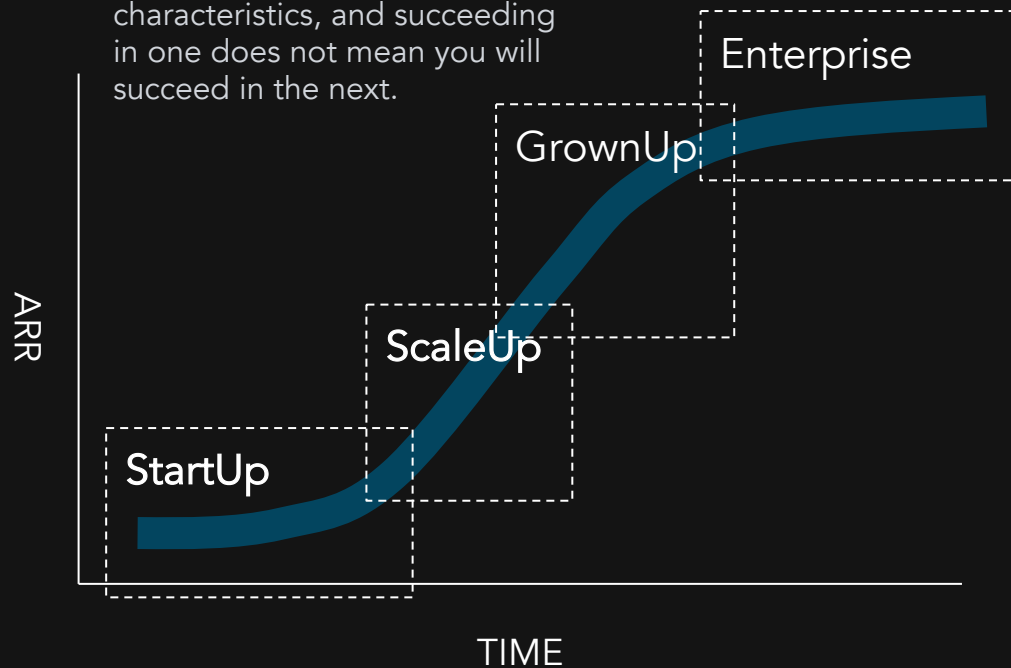
6	GTM Layer
5	Growth Layer
4	Operating Layer
3	Mathematical Layer
2	Data Layer
1	Revenue Layer

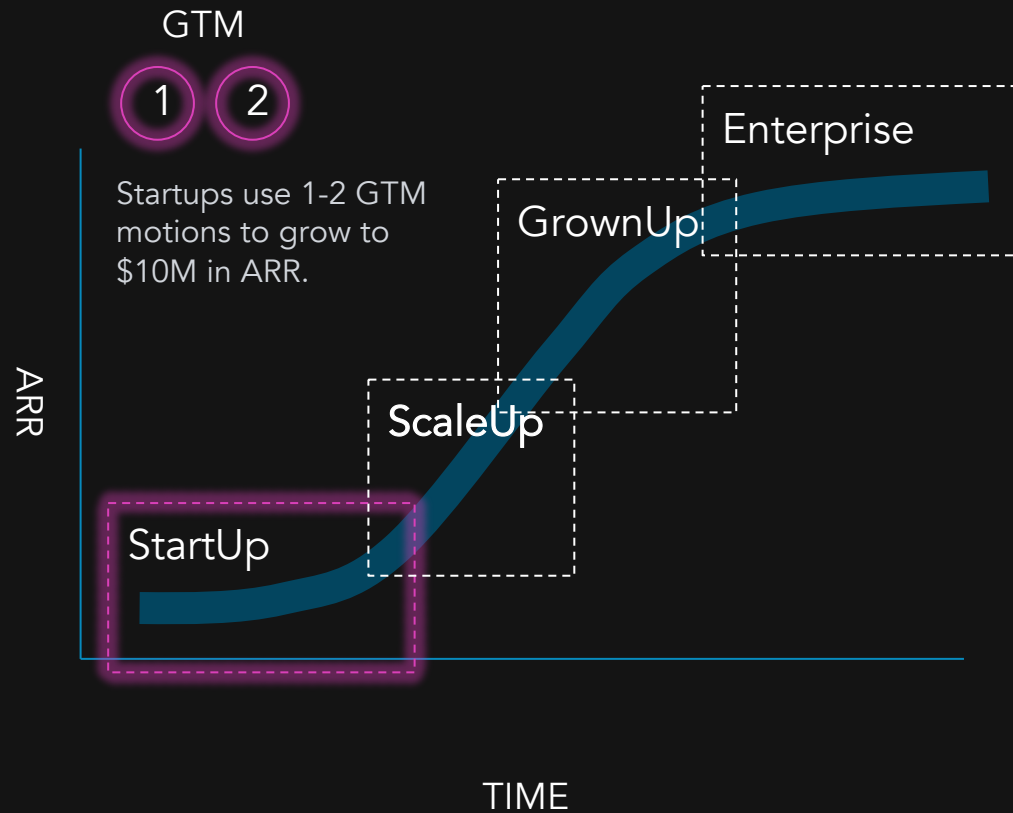
But this has changed. Today we see a bifurcation in the market between PLG on the low-and and Enterprise motion on the high end. Subsequently both are pestered with setbacks in churn and win-rate causing a rise in cost.

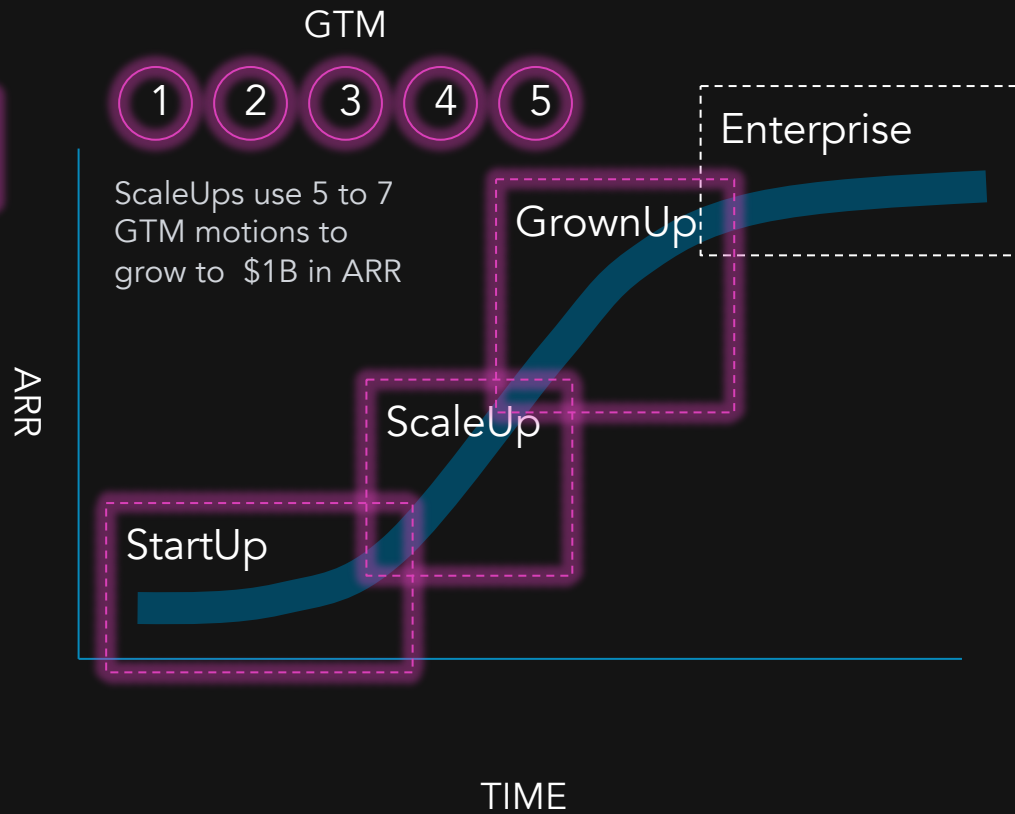
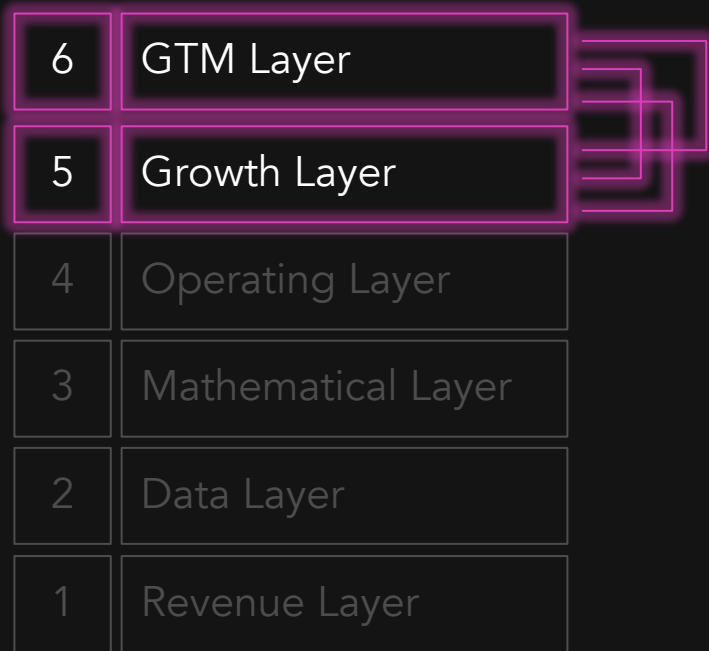


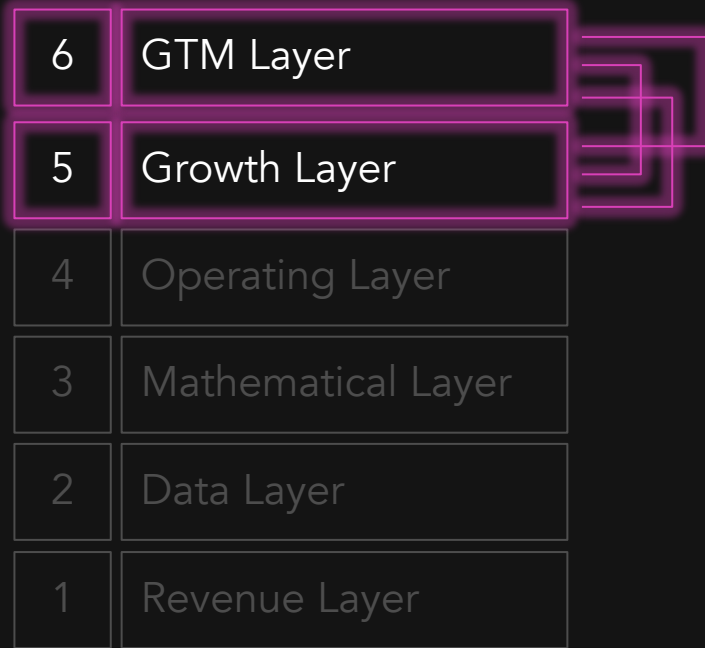
6	GTM Layer
5	Growth Layer
4	Operating Layer
3	Mathematical Layer
2	Data Layer
1	Revenue Layer

There are four stages of growth. Each stage has its own unique characteristics, and succeeding in one does not mean you will succeed in the next.

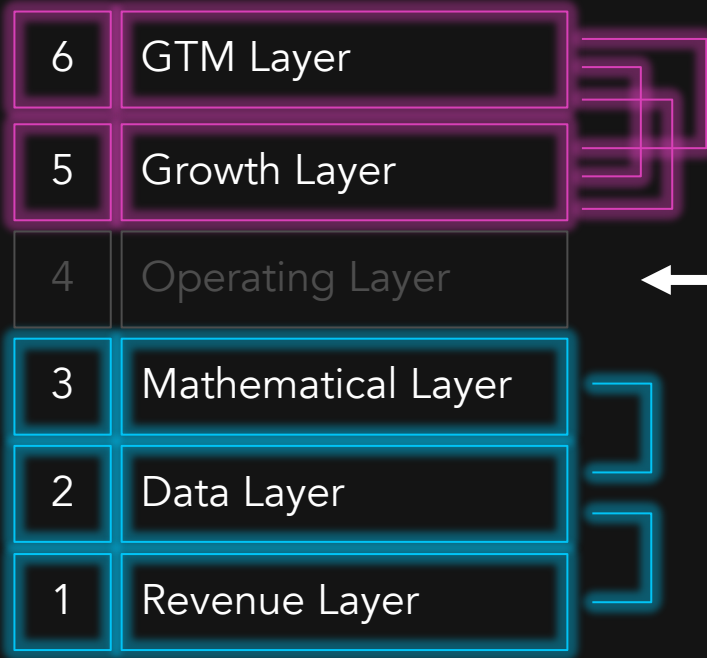








All these motions are supported by different tools, means and methods creating chaos. Trying to “change the volume of leads” you have no idea which “campaign to use.



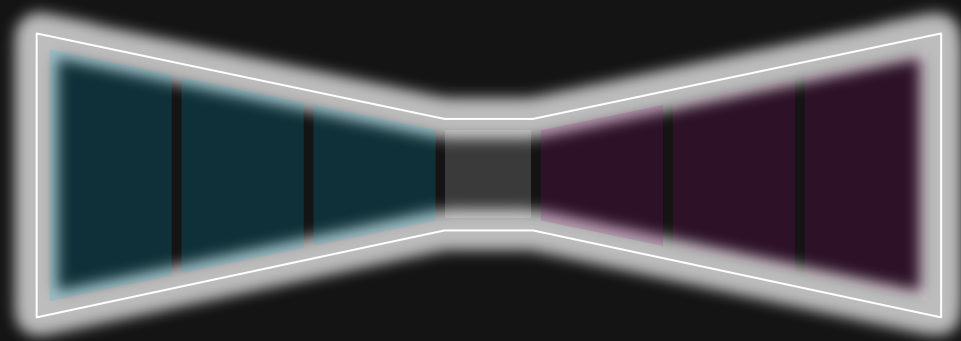
What is that?

So we spoke about all the different layers.... And we know we made a few oopsies in the blue layers, but we can fix those. We also know that the pink layers are messy and chaotic creating lots of inefficiencies as there is a widespread use of tools, means and methods for each GTM motion, and that there are 3-7 GTM motions. Furthermore with each change of leadership (about every 17-18 months), we get yet another method, another tool etc. What is missing is the layer that suppose to fix all this.

6	GTM Layer
5	Growth Layer
4	Operating Layer
3	Mathematical Layer
2	Data Layer
1	Revenue Layer

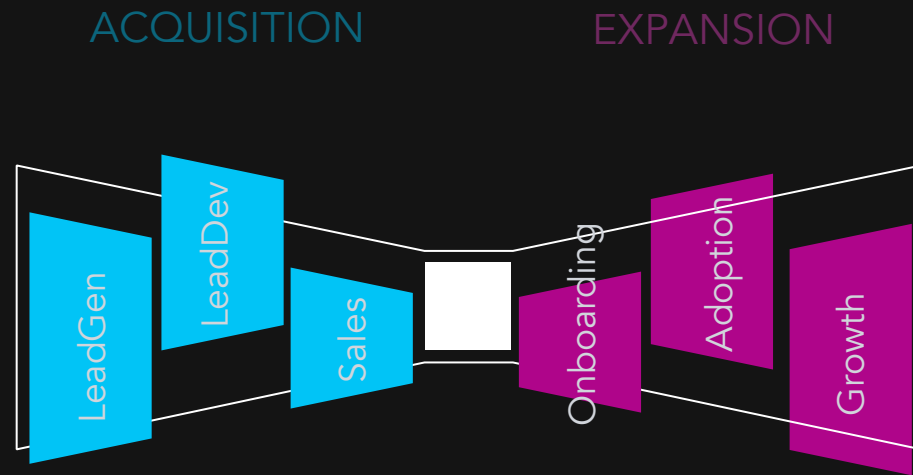
ACQUISITION

EXPANSION



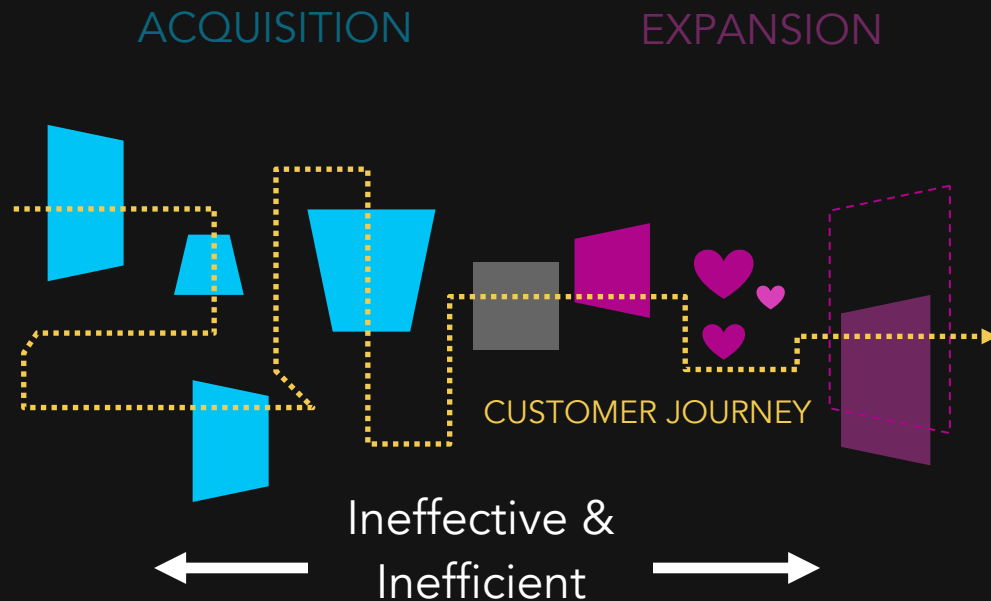
What is missing is the Operating Layer. This layer connects all functions, departments, roles, people etc. It allows for different means and methods to interface with each other. Historically tool vendors have had no interest to contribute to this operating model, as most tool vendors want to dominate.

6	GTM Layer
5	Growth Layer
4	Operating Layer
3	Mathematical Layer
2	Data Layer
1	Revenue Layer



Since no one really is responsible for making the entire system work as a whole, we are believed to think that the departments work fairly well with each other. I mean there are debates and political games.. But most of it is hidden from the customer, they only experience a little bit of mis-alignment.

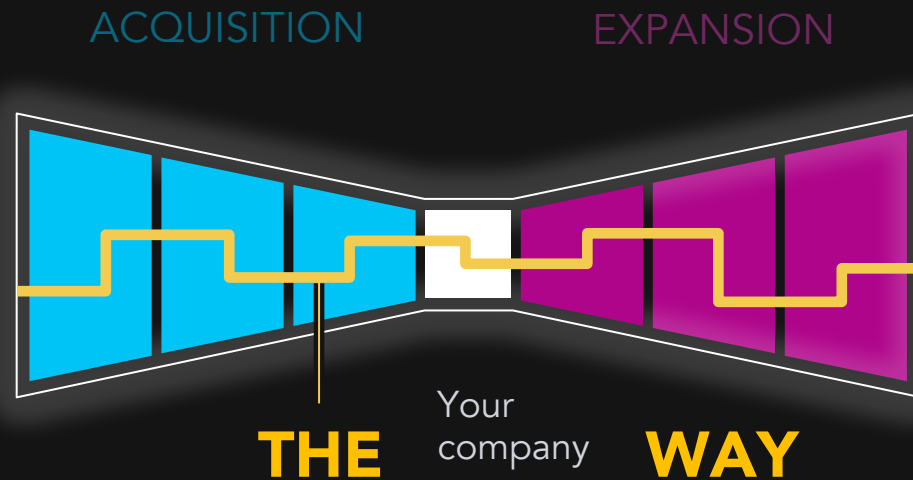
6	GTM Layer
5	Growth Layer
4	Operating Layer
3	Mathematical Layer
2	Data Layer
1	Revenue Layer



However, what we have found is that in reality it is a chaotic experience for a customer who is exposed to many different people each with a different goal, approaches etc. And that achieving 6-7 years of recurring revenue requires perseverance of a customer.

6	GTM Layer
5	Growth Layer
4	Operating Layer
3	Mathematical Layer
2	Data Layer
1	Revenue Layer

Companies need to *start* establishing their own operating model around \$10M. The subsequent funding will lead to 2-10x of people that will demand for it.



- Uniform Methodology
- Standardized Data
- Common Language

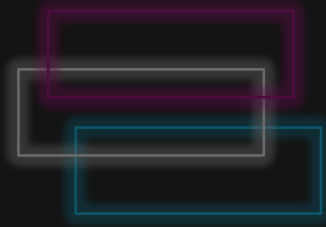
STRATEGY WHAT YOU LEARNED

- ❑ The next years will be all about GTM.
- ❑ GTM works along six models, layered on top of each other.
- ❑ Companies are Revenue Factories.
- ❑ They lack a Uniform Operating Model, The <...> Way.



SITUATION

Why are we here,
how did this happen?



STRATEGY

What do we need
to do differently.



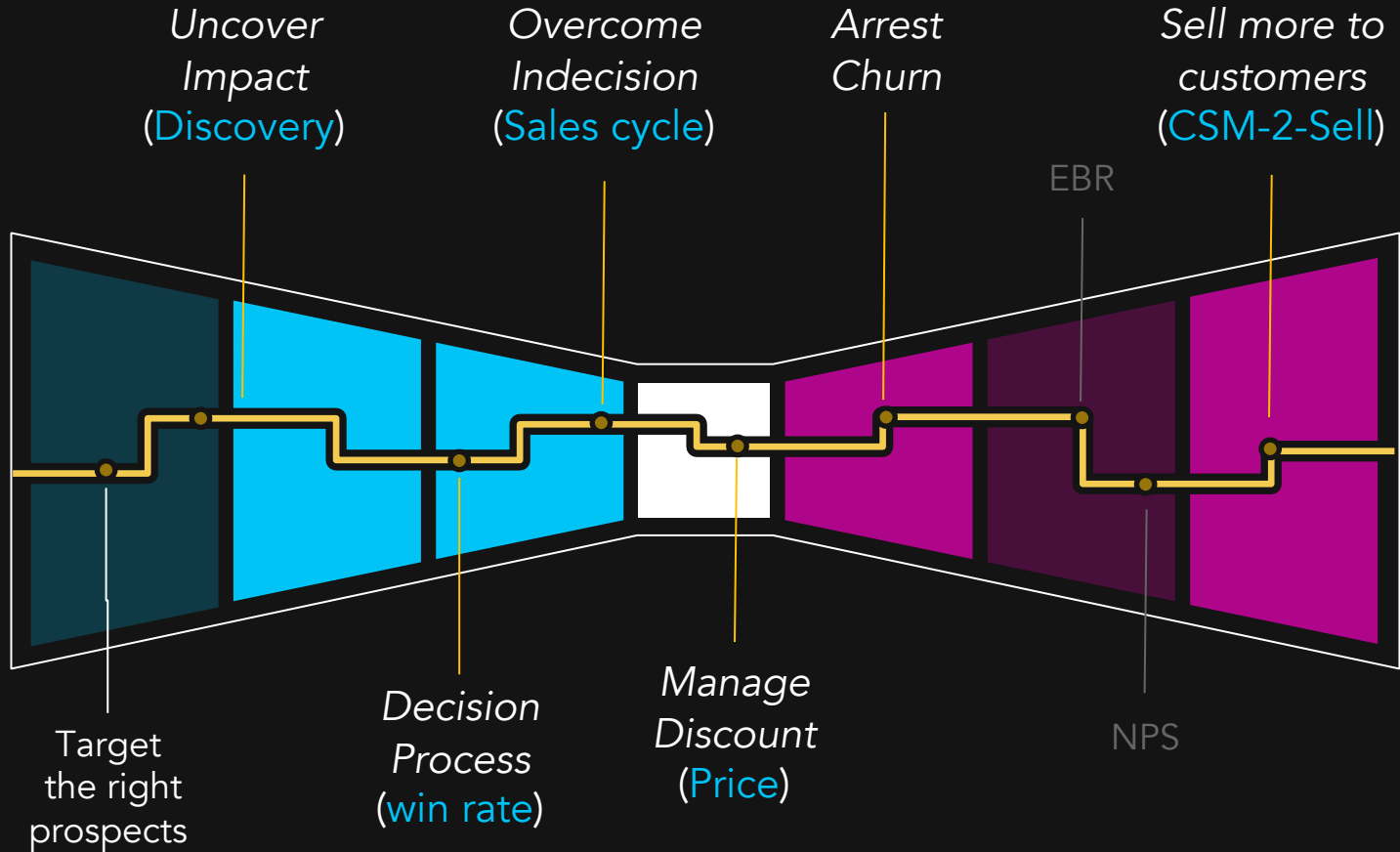
ACTION

What we can be
done right away.

ACTION WHAT YOU WILL LEARN

- Biggest & Quickest Gain.
- How to Achieve Impact.
- What Actions Cause the Quickest Impact.
- How to make each action stick.

There are many places of improvements, but these have been popular due to the quick gains.

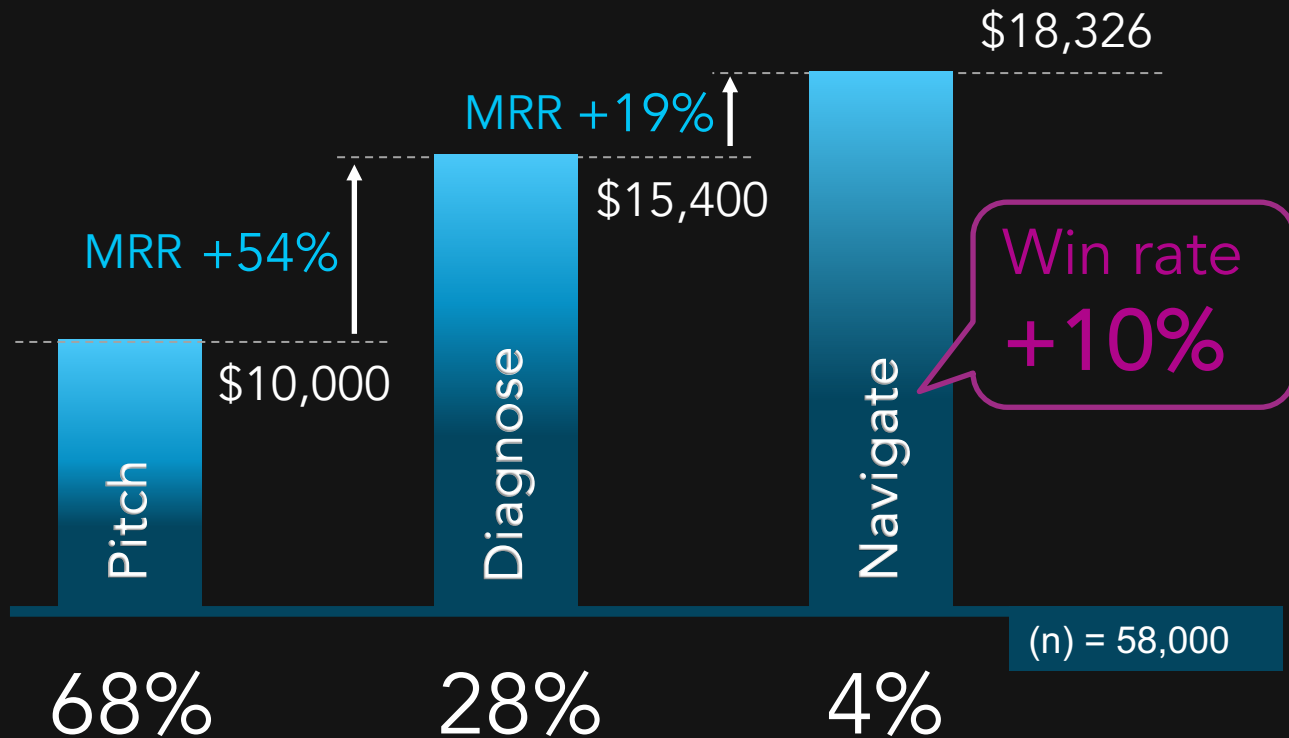


Uncover **IMPACT**

Over 2/3 of the performers are unable to correctly diagnose what a customer wants to achieve with the product you sell. Those who do gain 54% more revenue out of the same amount of opportunities.

The superstars who are able to navigate the decision process, gain an additional 19% in revenue, and have a 10% higher win-rate.

You should focus on improving the 68%. 28% of these are non-performers (fire/lower cost) the remaining can be trained-up.



The **IMPACT SPRINT**®

You train up your non-performers not based on 8 hours on a series of skills completed with certification, but rather focus 1 skill and apply it in the field until they proven they can master this.

Reduce to one skill



Customize

Training

Coach

Coach

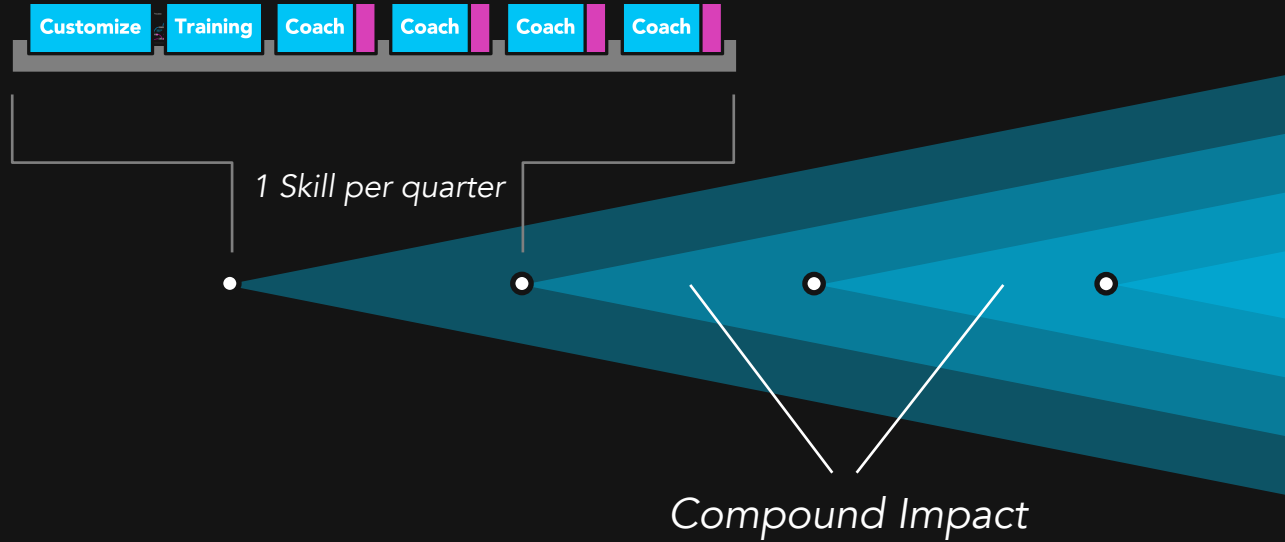
Coach

Coach

← *Making it stick* →

The **IMPACT SPRINT**®

Do 1 skill per quarter, every quarter and the effects compound.



The **IMPACT SPRINT**®

Some of the gains we have seen from various Sprints

These effects compound in multiple dimensions with each other leading to a near instant increase in growth rate. This accelerates over time as you implement more and more specific skills.

We recommend you start with a simple skill (discounting), and gradually increase the complexity.

Some of these skills may be accompanied by a SPIFF program to accelerate adoption among the contributors.

Note: Most of these skills can be applied to both acquisition as well as expansion teams.

- Indecision-JOLT™ **+10% WR**
- Decision Complexity **+10% WR**
- Discounting **45% → 17% ACV**
- Diagnose **+54% ACV**
- Lead Conversion **9% → 23% CR**

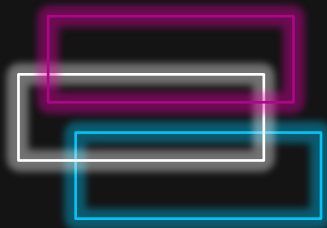
ACTION WHAT YOU HAVE LEARNED

- Use of Sprints.
- Train One Skill per Quarter.
- Coach to make it Stick.
- Rinse and Repeat.



SITUATION

Why are we here,
how did this happen?



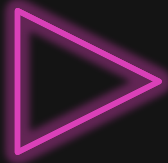
STRATEGY

What do we need
to do differently.



ACTION

What we can be
done right away.



SITUATION

Raise Awareness by sharing articles with your execs, board etc.
"Sweet Spot in the Eye of the Storm" or
the HBR Article "The Rebirth of SaaS."



STRATEGY

Start building your own Operating Model >\$10M in ARR
The <..> Way



ACTION

For quick impact on growth focus one 1 skill at a time
Impact Sprints®

Thank You



Pablo Dominguez

**Operating Partner,
Sales & Customer Success
Insight Partners**

Do The Right Thing: Master the Art of the
Tradeoff to Unlock Growth

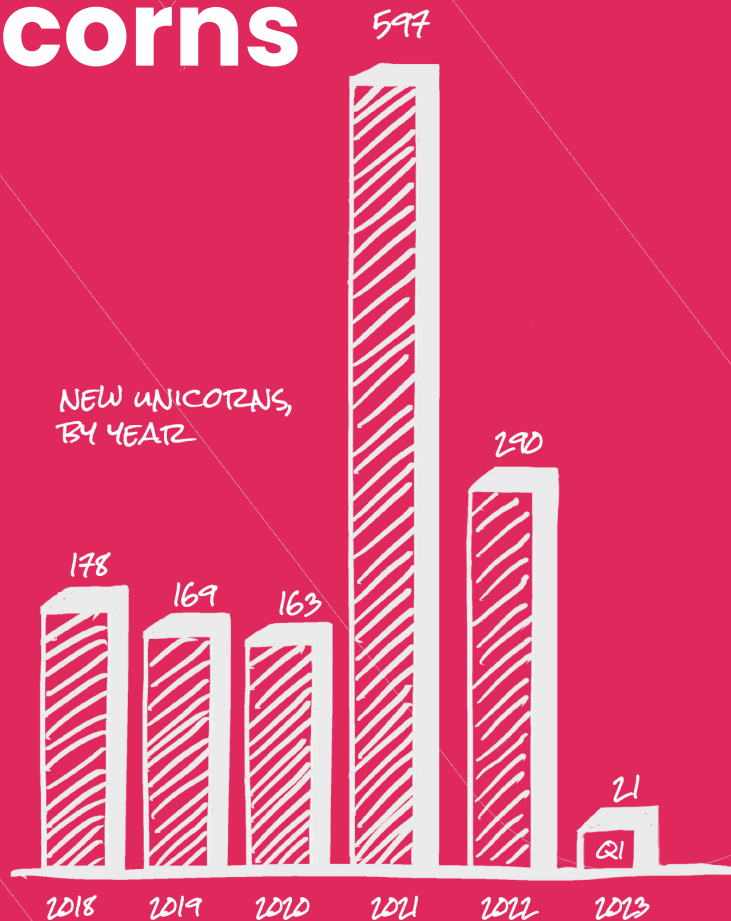




***Creating unparalleled gatherings that
spark transformational growth for
Go-To-Market leaders***

***GTM Summit
Oct 10-12
Nashville***

Minted Unicorns



← 2%

<0.5%

Lagging indicators

CAC Payback



FCF Margin



Bookings/Ramped
Rep



Leading indicators

Sales Cycles



Avg Deal Size

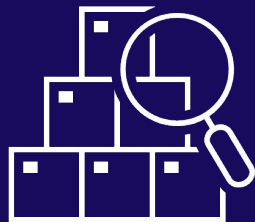


Pipeline creation



The dilemma of driving sustainable growth

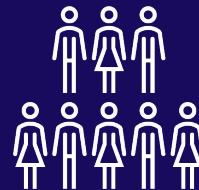
Rolling out multiple products



Going into new regions or markets



Deploying different resources



Key Outcome: getting alignment and being laser focused on what will help drive growth and make tough choices on what NOT to do

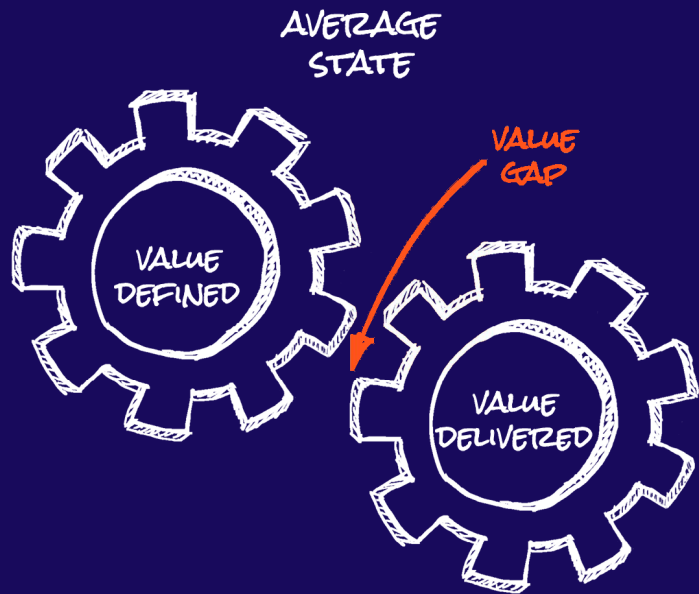
Re-evaluate your Strategy

“The essence of strategy is choosing what **not** to do.”

— **Michael Porter**
Author, Competitive Advantage

NETFLIX

Focus on Driving Value for your Customer



How:

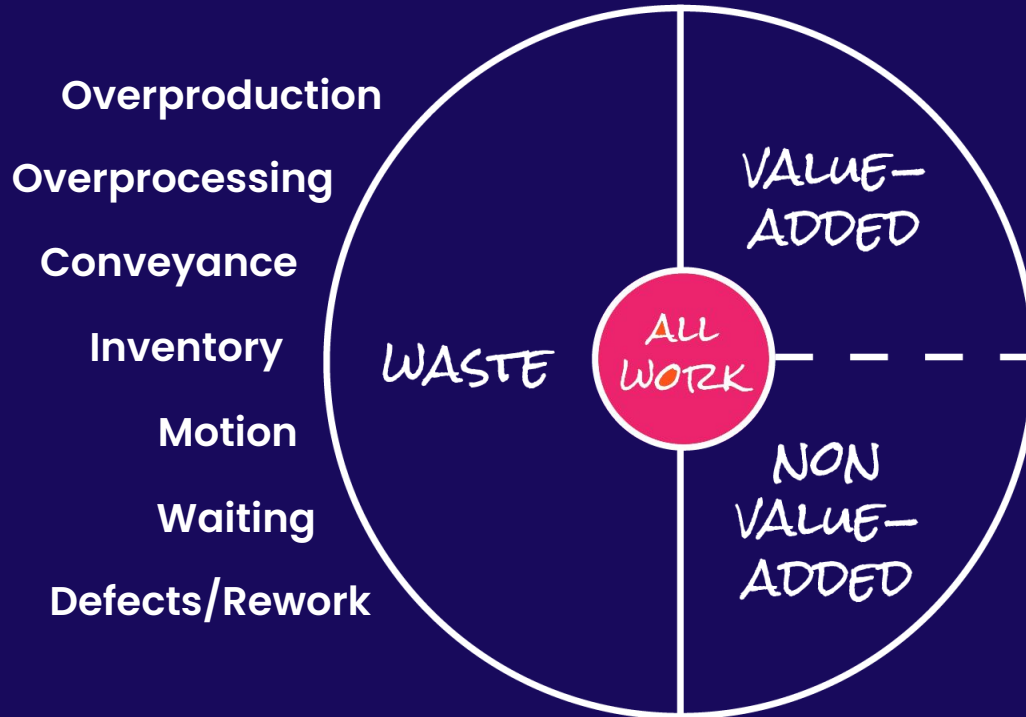
Understand what jobs a customer is trying to do, and does your product, your marketing, and your sales/post sales efforts align to drive maximum value?

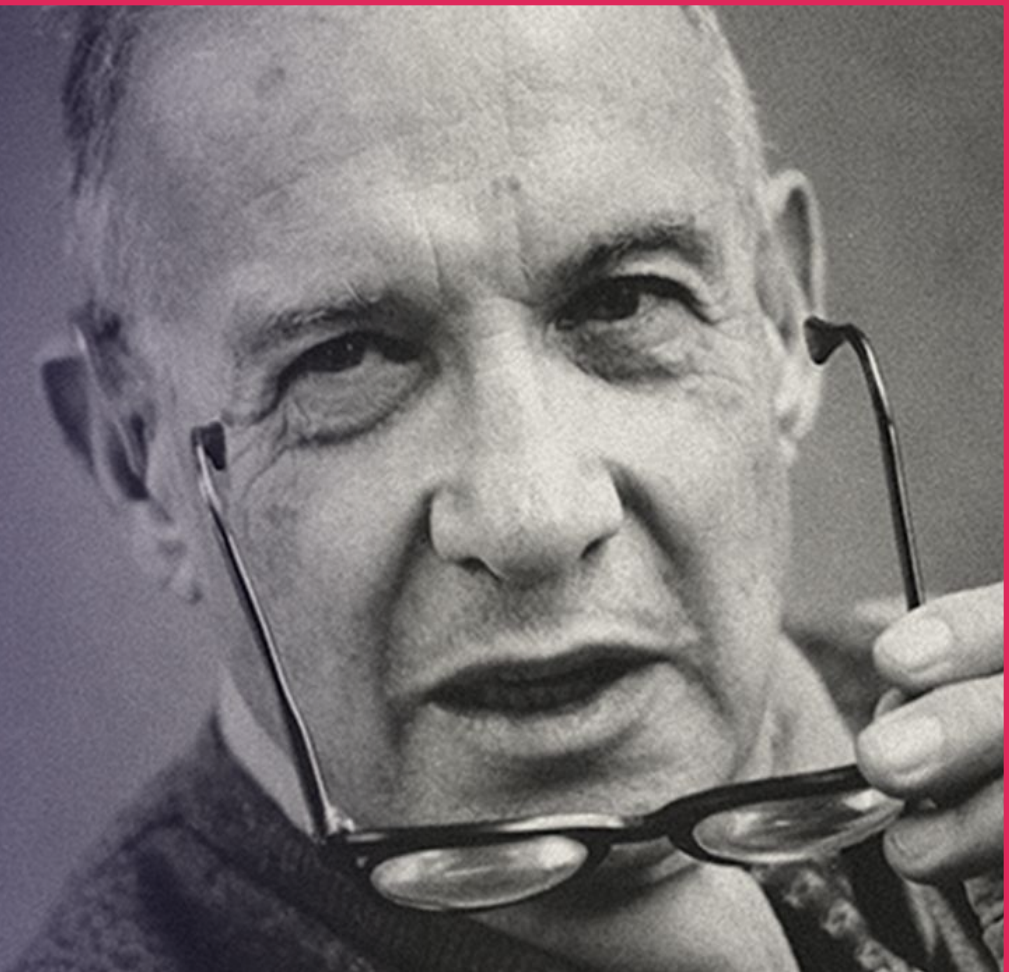
(ICP and Persona work)

Outcomes:

Improvement in Win rates and NRR

Customers only want to pay for Value-Add work





“There is nothing
so **useless** as doing
efficiently that
which **should not be
done at all.**”

Peter Drucker

Fireside Chat

**Tech Recession, Valuations,
and the Outlook for SaaS
Heading into 2H '23**



**Jason
Lemkin**

**Founder, Enthusiast & VC
SaaStr**

**Sam
Jacobs**

**Founder & CEO
Pavilion**



Key Takeaways

- We will get some lift from “lapping tougher times” and closing better customers; in a year, this will help us see an NRR boost
- There is no easy answer for startups that are not growing
- Sales motion was not remotely efficient in 2021 and we have to get back to fundamentals
- Biggest worry in board meetings – PLG. Companies are using this as a strategy when they don't really understand it
- The magic of communities is connecting the best of today with the best of tomorrow

Fireside Chat

How GTM Teams Are Building Pipeline with AI



**May
Habib**

CEO & Co-Founder
Writer

**Sam
Jacobs**

Founder & CEO
Pavilion



Key Takeaways

- Nobody wants to be left behind. The C-suite is asking “Can we be more efficient/better than our competitors in the adoption of AI?”
- A few use cases for AI:
 - Driving pipeline, in terms of personalization and verticalization
 - Creating bespoke funnels with smaller teams
 - Creating structured pages for top of funnel content
- AI adoption starts with leadership – tone must be set from the top down

Sangram Vajre

CEO & Co-Founder
GTM Partners

The New ROI Framework: 5 Types of ROI to
Help You Make 2023 Revenue Goals



The ROI Challenge

1. We have a clear ROI story
2. We need help
3. We know it, but can't prove it

**60% of companies
polled struggle to
articulate
and prove ROI.**

**Proving ROI is CRITICAL
for revenue growth.**

Do you have an ROI problem?

VENDOR SELF- ASSESSMENT

User loves your product but can't quantify ROI to their boss	Yes / No
User is skeptical of vendors claims of ROI	Yes / No
Vendors GTM teams are not aligned on how users should quantify ROI	Yes / No
ROI is hard to quantify consistently across customers	Yes / No
Proving ROI requires too much heavy lifting to be realistic	Yes / No
Quantified ROI is not compelling enough to retain customers	Yes / No
ROI quantification is not part of the sales process	Yes / No
GTM teams are not enabled on how to quantify ROI	Yes / No
Buyers and users are not taught how to quantify the ROI	Yes / No

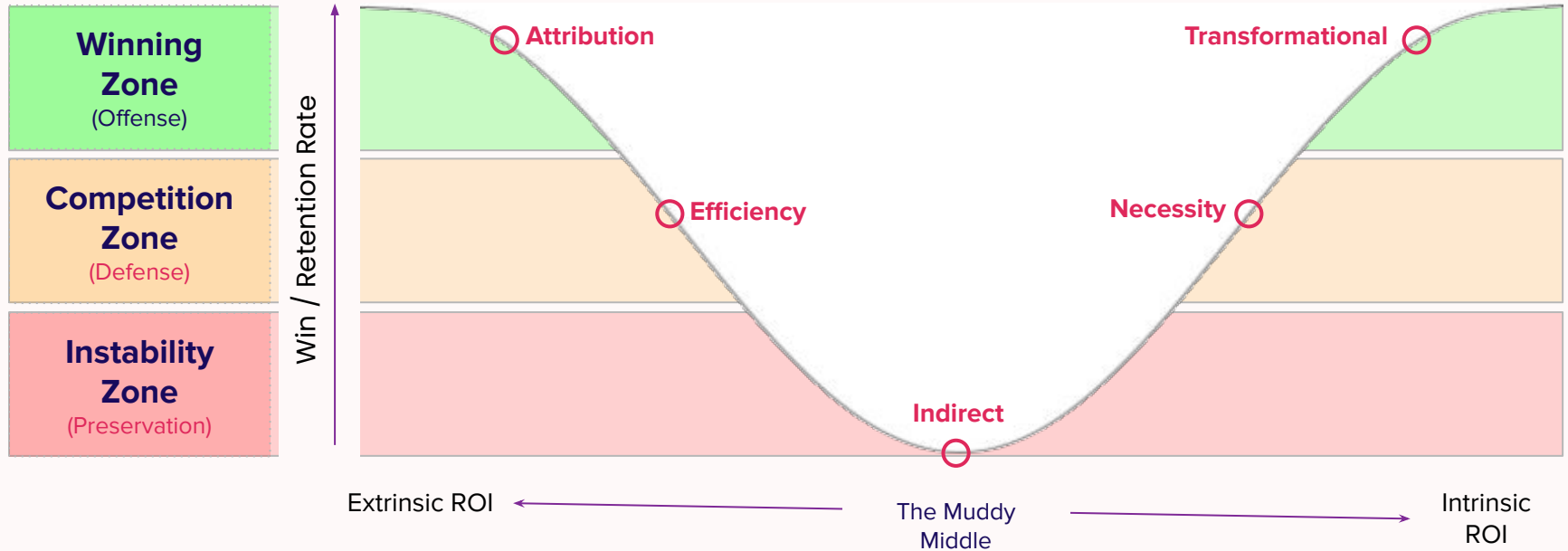
Source: GTM Partners' ROI Framework
© GTM Partners, All Rights Reserved
gtmpartners.com



ROI Categories	Description	Measurement
----------------	-------------	-------------

What is the ROI story for your solution?

The ROI Framework: Proving Your Value



QUOTABLES

"Completely evolved the way we manage data"

"A high impact platform for numerous use cases that would otherwise require many different disconnected tools"

"A critical data platform to scale our business"

"Full data cleansing and orchestration in one place"

"A must-have for data-driven marketing & sales"

"An operations professionals best friend"

"Our strategic partner for growth"

"Run previous siloed use cases (routing, attribution, funnel lifecycle) all within on platform"



Goldcast's ROI

Customers see material ROI over prior approaches after implementing Goldcast.

Revenue Outcomes with Goldcast

Goldcast customers report revenue and savings outcomes as a direct result of digital and hybrid event execution

20%

Increase in event attendance
Cognism

30%

More SQLs in 90 days
Salesloft

\$13M

Influenced pipeline from events
Starburst

2nd

Highest pipeline generating channel
Alyce

\$4.3M

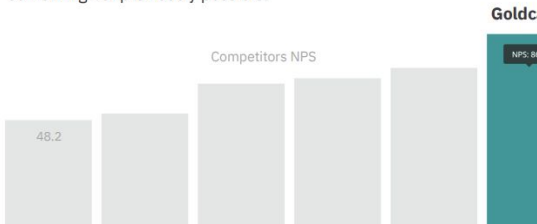
In pipeline generated from events
ThoughtSpot

Savings

Consolidated all event tech (Webinar, Virtual, Hybrid)
Drift

Goldcast Has Highest NPS Among Alternatives

At a score of 86.5 Goldcast is well above the alternatives and SaaS averages. Simply put their score would suggest that for every 100 promoters they only have 8 detractors. Category NPS averages for webinars, event management, and virtual events are 59, 61, and 78 respectively. New and emerging technologies typically get higher NPS ratings led by early adopters who are ecstatic with the ability to do something not previously possible.



* Quotes and stats are from case studies, our direct customer interviews, and user review submitted through G2.com

Sendoso's ROI

Customer's see material ROI over prior approaches after implementing Sendoso.

Direct Marketing Automation Drives Revenue

Sendoso customers report revenue outcomes as a direct result of direct mail use in their own Go-to-Market programs

750

Opps Influenced
Anaplan

\$8M

Revenue Influenced (single campaign)
Outreach

72%

Increased webinar attendance
Verkada

15x

ROI attributed from direct mail campaign
Zendesk

5x

Response over non direct mail cadence
Guru

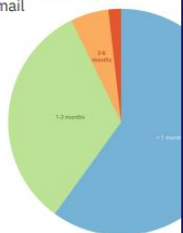
\$33M

Influenced pipeline (sourced \$5.5m)
Gong

Time-to-value within 3 Months

93% of Sendoso customers reported achieving a fast time to with teams up and sending direct mail or gifting within 1 to 3 months of purchase.

< 1 month	60%
1-3 months	32.73%
3-6 months	5.45%
Never	1.82%



* Quotes and stats are from our direct customer interviews & case studies as well as reviews submitted through G2.com

A Go-to-Market Perspective: SENDOSO | J

Hushly's ROI

Customer's see material ROI over prior approaches after implementing Hushly.

Lead Conversion

Hushly customers reported Lead Conversion increased by

as high as
243%

more unique lead conversion increase stats

57% | 88% | 67% | 55% | 207%

Lead Quality

Hushly customers reported Lead Quality went up by

as high as
62%

more unique lead quality increase stats

55% | 46% | 62%

Site Engagement

Hushly customers reported Site Engagement improvements of

9X

increase in content engagement

423%

increase in content engagement

1800%

increase in content engagement



Increase site dwell time



Reduced bounce rate



Increase target account engagement

* Quotes and stats are from our direct customer interviews as well as reviews submitted through G2.com

Here's a new way

GTM Operating System



Thank you!

Subscribe to GTM Monday
for weekly data-based
advice, and download the
full ROI Report



@sangramvajre

Gal Aga

Co-Founder & CEO
Aligned

The Ultimate Skill Sales Reps Need to
Close More Deals in a Down Economy



'Yesterday'
GROWTH AT ALL COST

'Today'
EFFICIENT GROWTH



YET MOST ARE STILL STRUGGLING...

Over 50% missed Q1.
Sales is hard now.

More SHs involved; Especially CFOs & CEOs

Influencing is harder given budget scrutiny

More complexity to control; Hesitance

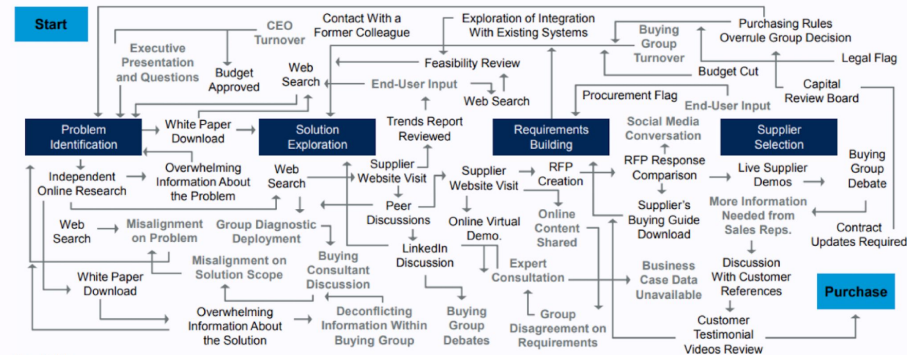
Trusting our 'gut'; Blind to 95% of b.journey



**What if we're tackling
this the wrong way?**

Sales is hard. BUYING is harder.

The modern B2B buying journey



Source: Gartner

16 © 2010 Gartner, Inc. and/or its affiliates. All rights reserved. Gartner is a registered trademark of Gartner, Inc. and its affiliates.

Gartner

BUYERS do most of the work (without the sellers)

The modern B2B buying journey



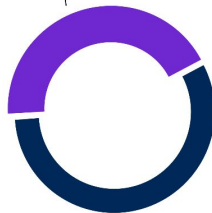
Source: Gartner

18 © 2019 Gartner, Inc. and/or its affiliates. All rights reserved. Gartner is a registered trademark of Gartner, Inc. and its affiliates.

Gartner

Buyer complexity = Lost revenue

43% prefer to
self-serve vs
talking to sales



Ease of purchase is **3x**
more likely to drive
bigger deals



Gartner.



Make Buying Easy

Close more deals, faster

How it looks like



How it should look like

Easy for **Champions** to promote internally

Easy for **Buying Committees** to self-serve

Easy to **Navigate** the buying process

Easy with **Buyer Insights** driven selling

'Yesterday'

SALES ENABLEMENT

Training, tools, & processes that make it EASY FOR SELLERS TO SELL

'Today'

BUYER ENABLEMENT

Training, tools, & processes that make it EASY FOR BUYERS TO BUY



Easy to promote internally and self-serve

Focus on your buyer's toolbox

Seller-focused tools:

- Scripts, decks, cheat sheets, etc.

Buyer-focused tools:

- Custom Decks
- Biz Case & Proposal templates
- Buying Calculators (ROI, TCO, Cost)
- Demo Experience tools
- Video Selling tools
- Digital Sales Rooms





Easy to promote internally and self-serve

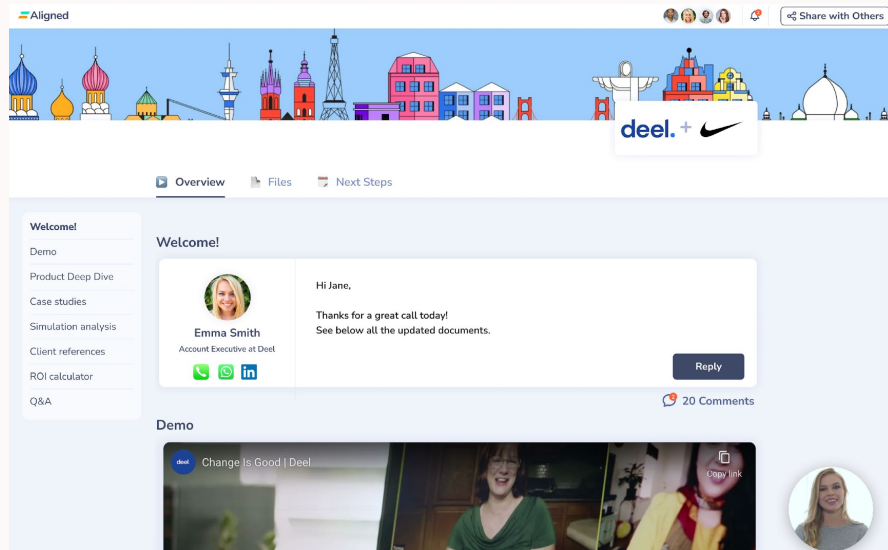
Example: Digital Sales Rooms

Deel Case Study:

- HR tech, \$1M-\$100M in 18mo
- Heavy education, content sharing
- 100s of emails deals are the norm

Results:

- Increase competitive deals wins
- 30% reduction in sales cycle





Easy to Navigate the buying process

Example: Mutual Action Plans

- Visibility & accountability
- Minimizes dragging & surprises
- Maintain a smooth process
- Puts you in a 'project mode'

Results:

- 23% reduction in sales cycle
- 15% increase in win rates

The screenshot displays the 'Aligned' platform interface for a 'Mutual Success Plan'. The top navigation bar includes 'Overview', 'Commercial', and 'Mutual Success Plan'. A 'Share with Others' button is in the top right. The left sidebar lists navigation items: 'Welcome!', 'Demo', 'Product Deep Dive', 'Case studies', 'Simulation analysis', 'Client references', 'ROI calculator', and 'Q&A'. The main content area is divided into two sections: 'Our Next Steps' and 'Process & Timeline'. The 'Our Next Steps' section shows a 100% progress bar and a list of tasks with due dates and assigned users. The 'Process & Timeline' section shows a timeline with three steps: 'Pricing & Terms' (completed), 'Team Kickoff' (in progress), and 'Team Kickoff' (upcoming).

Task	Due Date	Assigned To
Send follow up materials per your request	Jun 9th	[User]
Send proposal	Jun 10th	[User]
Check regard Hubspot integration timeline and initial scope	Jun 10th	[User]
Internal review with CEO	Jun 10th	[User]
Catch up - commercial discussion	Jun 16th	[User]
Catch up to plan training	Jun 22nd	[User]

Process & Timeline

Track where we are at any given time

- Pricing & Terms**
Close commercials and configuration. Executive summary and decision.
- Team Kickoff**
Intro and training with the team to get started
- Team Kickoff**
July 15th



Easy with Buyer Insights driven selling

Drive the right buyer enablement

- Leverage buyer data to understand Pain, interests, objections, etc.
- Build a better biz case
- Deliver a tailored buying experience
- Use buyer Intelligence tools

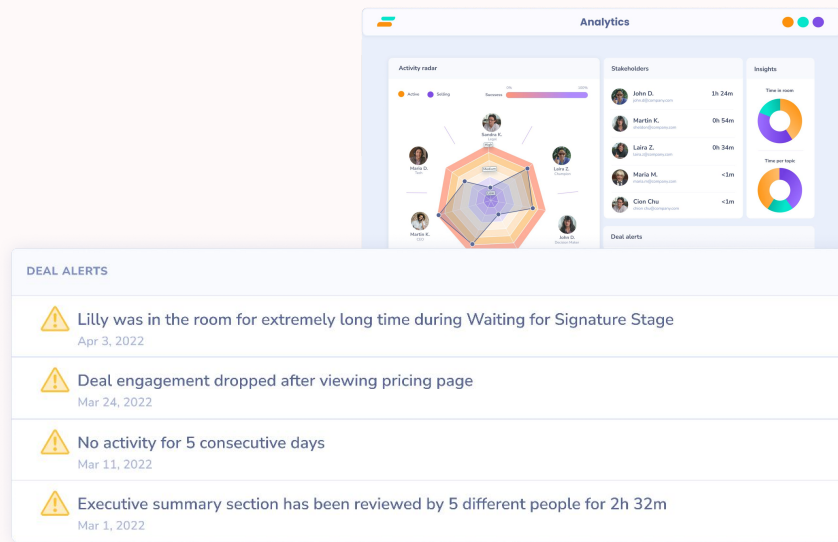




Easy with Buyer Insights driven selling

Example: Async Buyer Intelligence

- Uncover buyer blind spots
- Identify risks & intent
- Drive more relevant actions and buying experiences
- Improve forecast accuracy
- No more shooting in the dark





**Stop selling.
Make it EASY for BUYERS to buy.**



Get to revenue faster by collaborating *effectively with* buyers

Questions?

Fireside Chat

Optimizing Your
Time to Revenue



**Andy
Byrne**

CEO
Clari

**Sam
Jacobs**

Founder & CEO
Pavilion



Key Takeaways

- This market is different from previous downturns – back then, it was all about cost cutting; now, it's a blend of being prudent on costs but also driving the top line
- Revenue leak is revenue that a company has earned but has yet to capture — up to 15% of a company's revenue is lost every year to leakage
- To reduce leakage, you need to shrink time to revenue
- Executives need to ask themselves “Do we have the right tech stack to run our revenue process?”

Fireside Chat

Fueling Growth with
Product-Led Sales



**Thomas
Schiavone**

CEO & Co-Founder
Calixa

**Laura
Guerra**

VP Growth
Pavilion



Key Takeaways

- It's not just about the first sale, it's about subsequent sales in PLG
- Don't let trends sway you. Be honest about how your product works. You can't do PLG in a vacuum and you can't force a fit if it isn't there
- Sales motion was not remotely efficient in 2021 and we have to get back to fundamentals
- In PLG, sellers need to shift their mindset from ABC (always be closing) to ABH (always be helping)

Andrea Kayal

CRO

Teampay

Boardroom Metrics that Matter



15 Years in B2B SaaS

CMO to CRO

\$6-\$22mm

\$7-\$23mm

\$35-42mm

\$8-50mm

SAILTHRU

signpost



Upserve



Electric

Board and Advisory Roles

 **Help Scout**

bite

DANDY

Sendoso



SQUAREFOOT

**I am a compassionate, but
competitive human:)**



What I hope you get out of this session

- Perspective. I am absolutely not the authority here
- Practicality. These are examples of board slides that have been a hit
- Efficiency. It shows up on nearly every slide

Executive Summary

Marketing – State of the Business

Highlights

- US Organic Session: Up 117% YOY, 7% QoQ, and 109% of goal
- Total AQLs: Up 37% YOY, Flat QoQ, and 116% of AOP goal
- Hold Rate: 108% above goal
- New pitch deck: AE win rate improved by 2 points, to 28%
- Reviews: Increases ratings by 14%, over 70 positive reviews generated. Partnered with Captterra to produce 3rd party average user rating
- Customer marketing: drove 20 new customer referrals via email and \$40k in primary AM pipeline. Average CTO is 13%
- Product Marketing: Tableside drove 180 won deals: 128 Upsell, 35 New, 5 Cross, 7 Other
- Partner Marketing: Launched Allbound, Partner Playbook and generated 175 new signed partners, 54 Opps, 7 Deals

Lowlights

- AE opportunity volume attainment below plan:
 - **Digital Inbound:** 98% attainment in 1H, but 74% in June
 - “Incorrect decision maker/ unable to contact” lead status increased by 50% & “Not a fit” by 13% in Q2
 - Inbound set rate declined (moved OB off IB older leads to cold leads)
 - **Outbound:** 38% attainment due to 0 OB SDRs in May
 - **Channel:** 27% attainment due to re-org of this route-to-market
- Web conversion rates: decreased 30 basis points vs. Q1, which is in line with what we’d expect since we know incremental, non-branded traffic doesn’t convert as well as branded traffic

Digital Inbound Metrics

Traffic Sessions	AOP	Q2	Variance
U.S. Total (Exc Cust)	330,000	359,161	109%
Demo Requests			
Total AQLs	4,000	4,639	116%
Valid AQLs	2,640	2,406	91%
Set Rate	35%	22%	62%
Set	1,408	1,019	72%
Hold Rate (on Meetings Set)	66%	72%	108%
Opportunities			
Meetings Held	935	733	78%
Opp Count	919	712	77%
Pipeline	\$5,514,000	\$3,507,342	64%
Deals			
Deal Count	325	172	53%
Bookings	\$1,992,300	\$1,174,461	59%
SQL to Close	35%	24%	68%

Notes:

- Digital inbound: Accounts for 57% new logo bookings target
- Outbound: Accounts for 5% of X new logo bookings target
- Partner: Accounts for 37% of new logo booking target

Forward-Looking Priorities

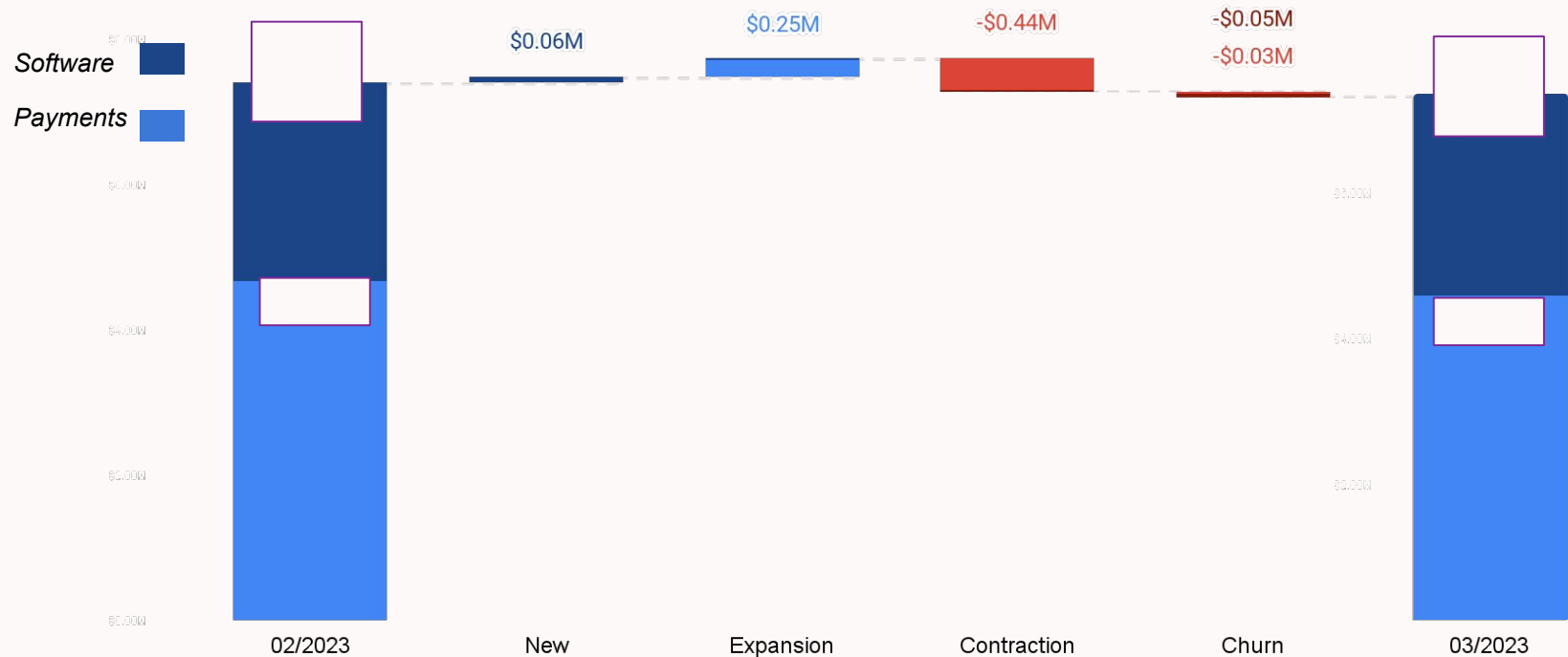
- Increase IB Rep Productivity
 - Increase number of dials on previous month IB leads
- Increase workable AQLs
 - Increase site conversions (navigation, A/B tests)
 - Activate James Beard Foundation partnership
 - Send 1-terminals to AELs
 - Hire SEO Agency
 - Activate influencers
 - Deploy interactive tools like [Marketing Grader](#) (drove 60 leads from free referrals), next up Business Plan Generator
- Improve Outbound
 - Realign staff schedule to time of day
 - Run a regional integrated marketing playbook



Revenue Performance

Revenue Waterfall

Where did you start and where did you land?



Burn Multiple (David Sacks)

For each dollar spent on growth, one dollar in net new ARR is generated. You want this to be low.

Burn Multiple = Net Burn/Net New ARR

- Net Burn = Cash Revenue – Cash Operating Expenses
- Net New ARR = New ARR + Expansion ARR
– Churned ARR

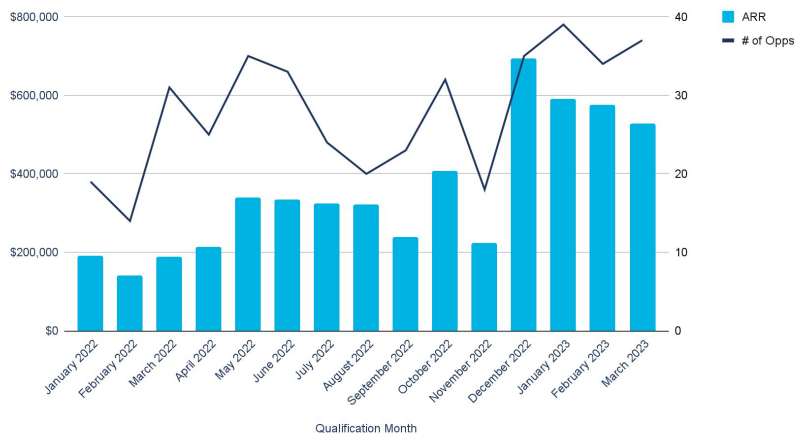
Burn Multiple	Efficiency
Under 1x	Amazing
1 - 1.5x	Great
1.5 - 2x	Good
2 - 3x	Suspect
Over 3x	Bad

Pipeline Performance

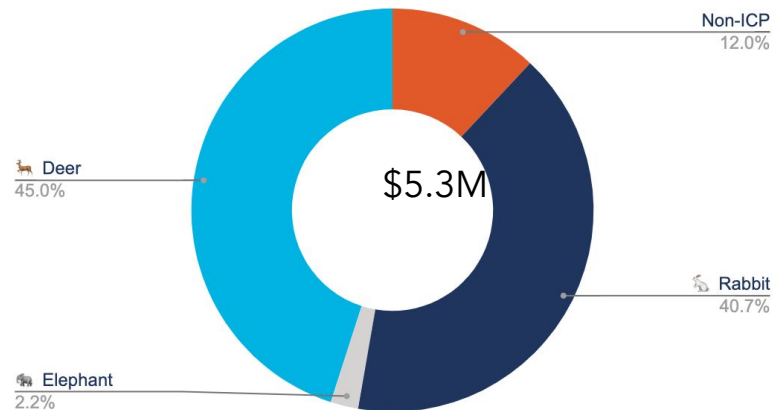
Pipeline Performance

Pipeline has grown significantly YOY, more than tripling from Q1 2022 to Q1 2023 with a strong pipeline of our larger segments

Accelerating New Opps and Pipeline Growth



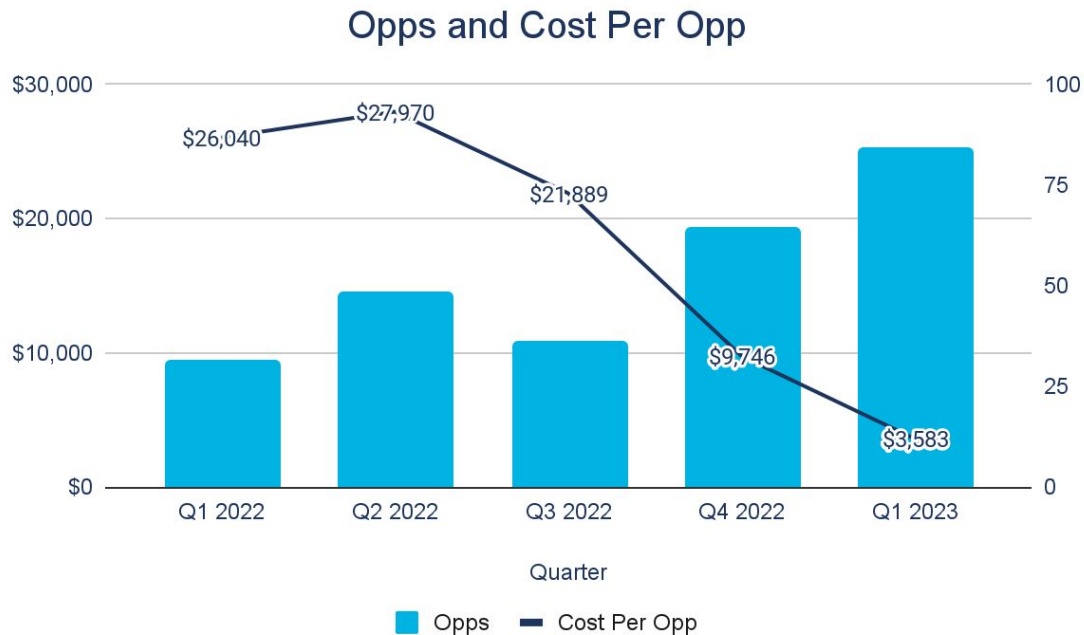
Pipeline \$ by Segment



Marketing Performance

Marketing Cost Efficiency

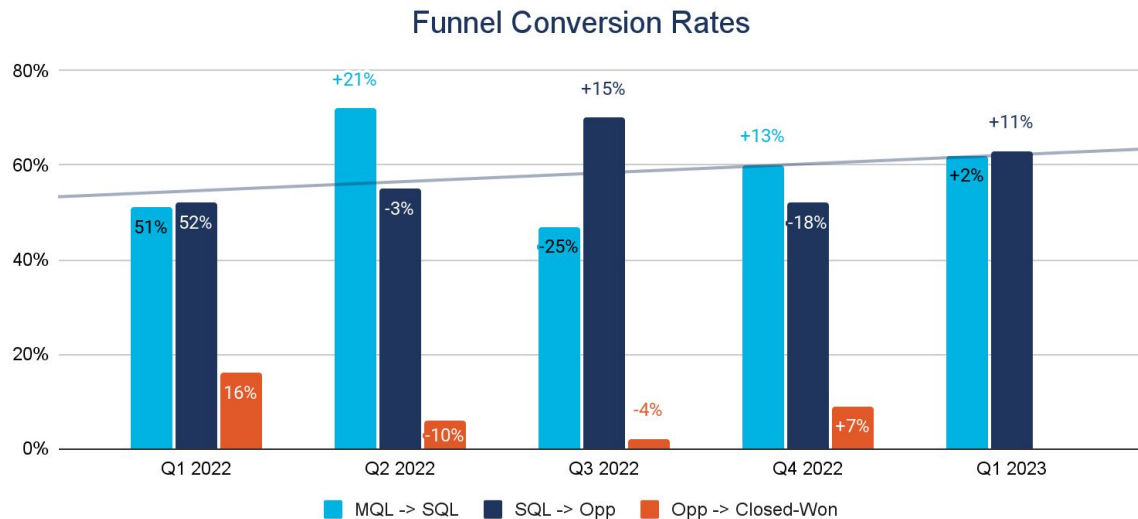
While pipeline has more than tripled YoY, cost per Opp has decreased by 90%



Marketing Funnel Efficiency

Marketing is beginning to drive consistency between stage conversion rates QoQ by investing in channels that are reliable/efficient.

To note: Q1'22 is baseline for conversion metrics QoQ; Closed-Won is time adjusted by one Q, Q1'23 Closed-Won to convert in Q2'23.



Q1 Marketing Channel Performance

Solid performance across all channels with the exception of Organic and non-brand SEO. Reductions to the team had an impact on performance.

	MQL Goal	MQL Actual	MQL Pacing	SQL Goal	SQL Actual	SQL Pacing	Opp Goal	Opp Actual	Opp Pacing
Owned (DB Email)	77	53	69%	46	50	109%	24	32	133%
Sponsored Content	43	43	105%	26	24	92%	13	18	138%
Paid Review Sites	19	11	100%	12	9	0	6	6	100%
Chat/Website (Direct)	22	60	273%	13	13	100%	7	9	129%
Organic & Non-Brand SEO	25	14	56%	8	2	25%	3	1	33%
Paid Search	80	119	149%	49	12	41%	25	8	56%
Paid Social	23	55	239%	14	23	164%	7	9	129%
Total	289	355	124%	168	133	81%	85	83	122%

Website Performance

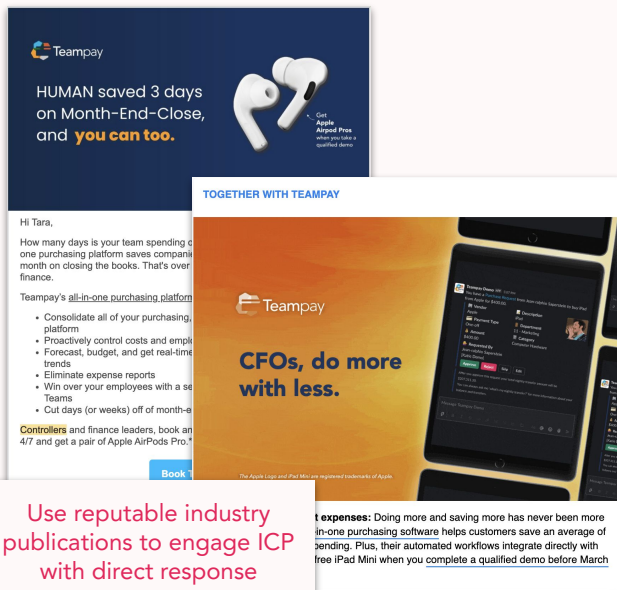
Despite cutting 100% of solely brand awareness spend and placing it into Direct Response campaigns, we have seen an increase in website sessions from Q422 to Q123.

	October 2022	November 2022	December 2022	January 2023	February 2023	March 2023 (QTD)
All Visitors	22,605	18,394	10,885	20,647	18,205	15,152
All US Visitors	18,232	8,165	7,800	15,713	13,695	11,179
All US Visitors Excluding Login	17,594	13,505	12,643	14,667	12,666	10,792
MQLs that have converted on site (all sources)	40	43	96	115	85	120
MQLs/ All US Visitors Excluding Login - Conversion	0.23%	0.32%	0.76%	0.78%	0.67%	1.11%
SQLs that have converted on site (all sources)	40	25	58	56	19	24
SQLs/ All US Visitors Excluding Login - Conversion	0.23%	0.19%	0.46%	0.38%	0.15%	0.22%

	Q1 2022	Q2 2022	Q3 2022	Q4 2022	Q1 2023
All Visitors	67,982	58,259 (-14%)	55,153 (-5%)	51,884 (-5.9%)	54,004 (+3.9%)

Q1 Prospect Marketing Campaigns

Industry Newsletters



Teampay

HUMAN saved 3 days on Month-End-Close, and **you can too.**

Get Apple AirPods Pro when you complete a qualified demo.

TOGETHER WITH TEAMPAY

Hi Tara,

How many days is your team spending on month-end close? Teampay's all-in-one purchasing platform saves companies an average of 3 days a month on closing the books. That's over 30 days a year.

Teampay's all-in-one purchasing platform

- Consolidate all of your purchasing, procurement, and approvals on one platform
- Proactively control costs and employee spend
- Forecast, budget, and get real-time trends
- Eliminate expense reports
- Win over your employees with a seamless user experience via Slack or Teams
- Cut days (or weeks) off of month-end close

Controllers and finance leaders, book an 4/7 and get a pair of Apple AirPods Pro.*

Book

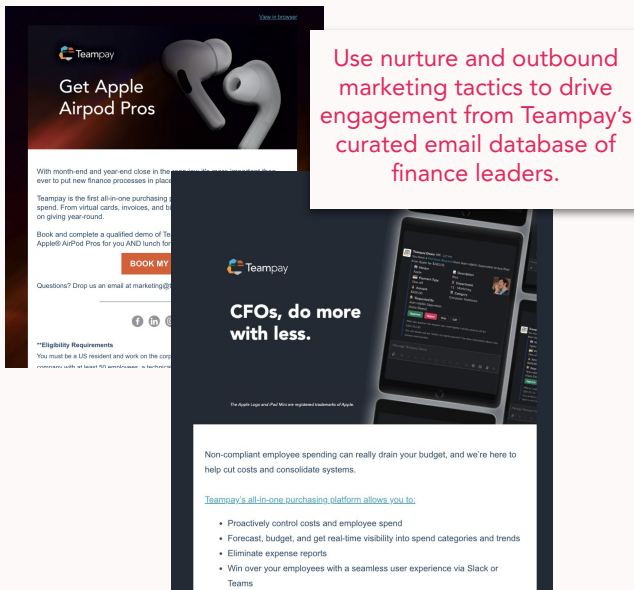
CFOs, do more with less.

Free expenses: Doing more and saving more has never been more important. Teampay's all-in-one purchasing software helps customers save an average of 3 days a month on closing the books. Plus, their automated workflows integrate directly with free iPad Mini when you complete a qualified demo before March 31st.

Use reputable industry publications to engage ICP with direct response promotions.

MQLs Generated: 45
SQL -> Opp Conversion: 65%
CPO: \$4,000

Teampay's Curated Email Database



Teampay

Get Apple AirPods Pro

With month-end and year-end close in the rearview, it's more important than ever to put new finance processes in place for a successful 2023.

Teampay is the first all-in-one purchasing platform that helps you manage your spend. From virtual cards, invoices, and bill pay to expense reports, Teampay has you covered.

Book and complete a qualified demo of Teampay's all-in-one purchasing platform and get a pair of Apple AirPods Pro for you AND lunch for two.

BOOK MY DEMO

Questions? Drop us an email at marketing@teampay.co

***Eligibility Requirements**
You must be a US resident and work on the corporate side of finance with at least 100 employees in a technology or financial services company.

CFOs, do more with less.

Non-compliant employee spending can really drain your budget, and we're here to help cut costs and consolidate systems.

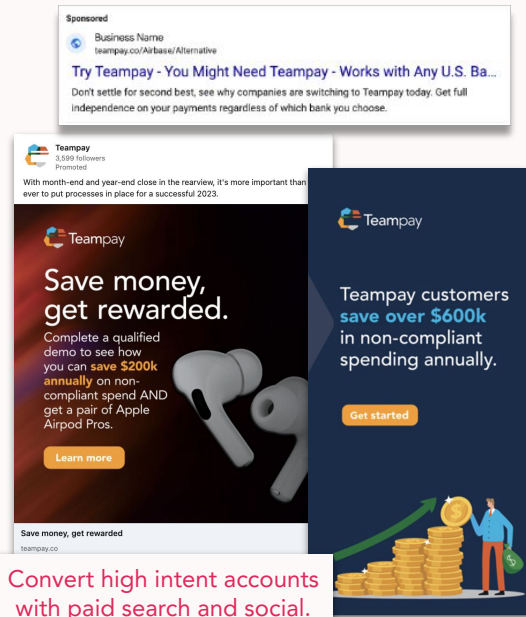
Teampay's all-in-one purchasing platform allows you to:

- Proactively control costs and employee spend
- Forecast, budget, and get real-time visibility into spend categories and trends
- Eliminate expense reports
- Win over your employees with a seamless user experience via Slack or Teams

Use nurture and outbound marketing tactics to drive engagement from Teampay's curated email database of finance leaders.

MQLs Generated: 62
SQL -> Opp Conversion: 63%
CPO: \$282

Paid Search & Paid Social



Sponsored

Business Name
teampay.co/Airbase/Alternative

Try Teampay - You Might Need Teampay - Works with Any U.S. Bank

Don't settle for second best, see why companies are switching to Teampay today. Get full independence on your payments regardless of which bank you choose.

Teampay
5,949 followers
Promoted

With month-end and year-end close in the rearview, it's more important than ever to put processes in place for a successful 2023.

Teampay

Save money, get rewarded.

Complete a qualified demo to see how you can **save \$200k annually** on non-compliant spend AND get a pair of Apple AirPods Pro.

Learn more

Save money, get rewarded
teampay.co

Teampay

Teampay customers **save over \$600k** in non-compliant spending annually.

Get started

Convert high intent accounts with paid search and social.

MQLs Generated: 145
SQL -> Opp Conversion: 48%
CPO: \$6,400

Sales Performance

Sales Performance

We grew our logos, revenue, win rate, sales cycle and decreased sales cycle, but we have more work to do to optimize further

	Q4 2022	Q1 2023	QoQ Change (%)
New Logos Won			150%
New ARR Won			51%
Average SaaS ACV			- 38%
Average Monthly Spend			- 32%
Average Deal Cycle			4.8%
Win Rate			47%
Average Discount			TBD

CS Performance

Customer Success Performance

Upsells and renewals increased QoQ, but a declining spend has a large impact on revenue

	Q4 2022	Q1 2023	QoQ Change
SaaS GRR			8%
SaaS NDR			-14%
Payments GRR			-17%
Average Customer Spend			-19%
Average Upsell			15%
Average renewal increase			-785%

Akansha Aggarwal

**Sr Director, Americas GTM
Strategy and Operations
NetAPP**

Driving Revenue with Strategic Planning
and Cross-Functional Alignment



Ops Excellence to Revenue Acceleration

- *Drives Productivity*
- *Drives good business data*

Operational Excellence

Strategic Thinking

- *Look around the corners; plan ahead*
- *Use data to drive predictable analytics- customer risk/customer propensity*

Cross-Functional Connectivity and Alignment

- *Integrated Pipeline Management*
- *Cross-functional KPIs aligned to business outcomes*

Core Competencies

OPERATIONAL EXCELLENCE	SALES OPS	BUSINESS PERFORMANCE
	<ul style="list-style-type: none">• Execute planning elements around segmentation, territory design, quota setting, HC planning for the Area• Business partner to Area VPs on establish a strategic plan for the business• Responsible for assessing the health of the business through data, insights and mechanisms within their leader's business• Own the rhythm of the business cadences and establishing mechanisms to drive goals/quota measurement• Drive operational excellence with focus on pipeline management, hygiene	<ul style="list-style-type: none">• Establishing and Leading the 'rhythm of business' mechanisms at the Geo level including forecasting, deal review, MBR and QBR.• Support the rhythm of the business (forecasting, reviews) at an Area Level with data and tools• Provide Insights and recommend actions for the business in a scalable manner around KPIs- linearity, pipeline management etc.• Voice of the customer/Business partner to WW Analytics for reporting dashboards & tools
STRATEGY	STRATEGIC PLANNING	GROWTH STRATEGY & INITIATIVES
	<ul style="list-style-type: none">• Strategic annual planning• Connected Account Planning• Scaling function of land what's build in Strategy with the field	<ul style="list-style-type: none">• Identifying and analyzing market opportunity and driving cross-functional initiatives to drive the next \$XB for the business• Defining and landing pilots to support business priorities laid down as part of strategic planning. Longer term thinking
ENABLEMENT	PROGRAM MANAGEMENT & FIELD ENABLEMENT	
	<ul style="list-style-type: none">• Identify process/projects that need streamlining and liaison with WW Ops to execute to drive field productivity• Responsible for managing the field enablement content and charter coming from across org; measure success with implementation• Responsible for identifying enablement needs from the field and liaison with leadership in WW OPS or others	
Need supporting Geo ops resources from Marketing, Technical and other supporting aligned		

Rabi Gupta

CEO & Co-Founder
Evabot

Use AI to Multi-Thread and Convert
Stakeholders Into Champions at 10X Speed



AI for Multithreading in Sales



Enterprise buying decisions are rarely made alone

And, to make matters worse...

We are in a consensus based decision making environment

6.8

decision makers are involved in every B2B purchase (CEB research)

What is multithreading?

Building **relationships** with **>1**
engaged stakeholder in a sales
process

What it actually means

1. **Connecting** with every decision maker on the buying side
2. Building **rapport** with each one of them at multiple levels (CRO to CRO etc)
3. Converting >1 stakeholders into **champions**

Agree?

The REAL problem

- **Connecting** with every decision maker on the buying side
- Building **rapport** with each one of them at multiple levels (CRO to CRO etc)
- Converting >1 stakeholders into **champions**

Building rapport & having >1 champions?

- Know them at a **personal** level
- Gather real time insights to **engage** personally and effectively
- Execute **thoughtful** touchpoints

It is hard. We tried!

- An effective sales rep is chasing **~30 deals** at any given time
- # of decision makers need to be engaged = **6.8**
- Total decision makers to be engaged (30×6.8) = **204**
- Time spent on research + personalized engagement to build rapport = **~30 mins/decision maker**
- Time spent / month = **~13 days / rep / month** 🤨

We asked ChatGPT if AI can help

how can we use AI to build rapport

Building rapport is an important part of human interaction, and while AI technology is rapidly advancing, it's important to note that it cannot completely replace human communication. However, there are a few ways in which AI can be used to help build rapport in certain contexts.

1. **Chatbots:** Chatbots can be programmed to use natural language processing to simulate human conversation. They can be used to answer frequently asked questions or provide customer support, allowing for quick and easy communication. Chatbots can also be programmed to use humor and empathy to build rapport with users.
2. **Personalization:** AI can be used to personalize communications with customers or clients. By using data on past interactions and preferences, AI systems can create customized experiences that feel more personal and engaging.
3. **Emotional Intelligence:** AI can be programmed to recognize and respond to emotions, which can be helpful in building rapport. For example, an AI system could be designed to recognize when a customer is frustrated and respond in a sympathetic and helpful manner.
4. **Voice Analysis:** Voice analysis technology can be used to analyze the tone and cadence of a conversation, which can provide insights into how to build rapport. For example, if the AI system detects that a customer is speaking quickly and with a high pitch, it may indicate that they are anxious, and the system can respond accordingly to help calm them down.

A framework to build rapport



Our History with AI and relationships



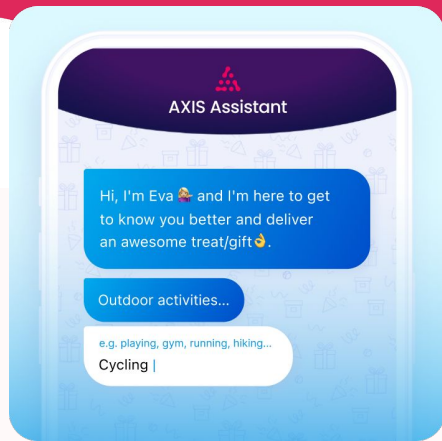
The PIN framework

Passions → Gather their personal passions

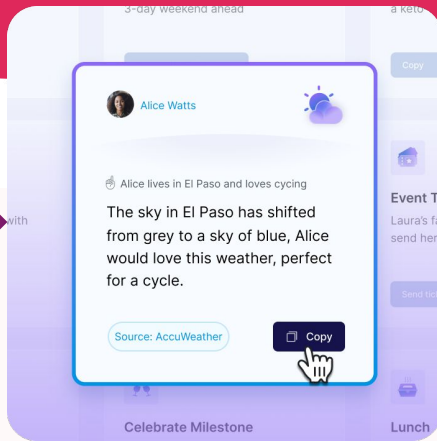
Insights → Find impactful events and insights around those passions

Nudge → Engage frequently in a **personalized** way
(both digitally and physically)

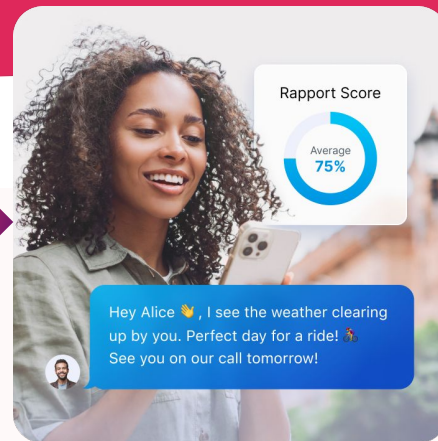
Building an AI from the ground up



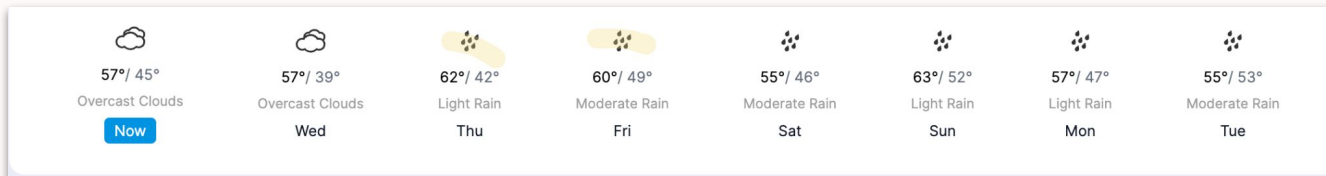
E.I. chatbot for
AI Engagement



Captures upto 30+
Passion points



Personalized & AI powered
Concierge + Nudges



Real rapport example – a \$10B enterprise

Preference

Coffee/Tea
Green Tea

My d Rabi G

to Dixie, Satwick me

inviting on the uth

deliver). Its a little hectic a

Hey

Thanks,

2 Attachments • Scan

Head of Enablement

I saw this cool Penguins merchandise and immediately thought of you. Have sent your way! Hope it can survive the thunderstorms and tornadoes 😊



Real multithreading example – a Fortune 50 company

Hi [redacted]

Thanks to you (and the team), the [redacted] central team is moving forward and we are meeting this Monday to finalize our solution. Hope to see you there!

To remind you of our solution, [here](#) is the launch video.

PS. Looks like it's raining this weekend but hope next weekend you can visit Betterton beach with family and kids. Heard it's a good one.

See you on Monday!

Thank

Hi [redacted]

PS. Excited about the summers and Paddleboarding season coming up? Looks like Hudson river recreation is a perfect one for that. Been there?

Thanks to you (and the team), the [redacted] central team is moving forward and we are meeting this Monday to finalize our solution. Hope to see you there!

To remind you of our solution, [here](#) is the launch video.

PS. Did you see the "Ruin 'Good real" episode on the **Stuff you should know** podcast? I always thought it was a bit overpriced. I know that might not be the case haha.

To remind you of our solution, [here](#) is the launch video.

PS. Did you see -- Foofighters [will be playing live](#) in Columbus, Ohio next month (May 28th)? I know it's a 4-5 hours drive but see if you can make it :-)

Hi,

Just talked to the [redacted] and [redacted] today. Thank you for arranging this for us. ([redacted] is absolutely a gem and very helpful.

I think we are very close and sales leaders like the new **AI for rapport enablement** solution a lot. I hope we can take it to the finish line and drive powerful outcomes for [redacted]

Would appreciate all the support and help.

Also, I saw that it's raining throughout the week. A small surprise from [Cometeer](#) coffee. It's great. (I love her coffee :). Hope the family and kids are doing well.

Thank you



[redacted]
to me, Satwick ▾

Hi Rabi –

I'm so glad it went well and looking forward to hearing their feedback!!

So thoughtful of you but unnecessary on the coffee but you know me – I do love my coffee!!

[redacted] and I will be back in touch – we know this is something that our sales teams are very excited about so looking forward to a larger implementation!

Hope you are doing well.

[redacted]
U.S. Commercial Enablement
[redacted]

5:06 AM (11 hours ago)



Results: Building rapport at 10X speed

	Today	EvaBot AI
Avg. time to gather data on each decision maker	Multiple meetings	0 min.
Avg. time to research on each decision maker	30 min.	1 min.
Time to personalize the engagement	10 min.	3 min.
Total Time Spent each month per decision maker	40 min./person	4 min./person
Total time required for 204 decision makers	116 hrs Or 14 working days	13 hrs Or 1.5 working days

Thank you

For any questions or for a demo
email me

- rabi@evabot.ai



Hayes Davis

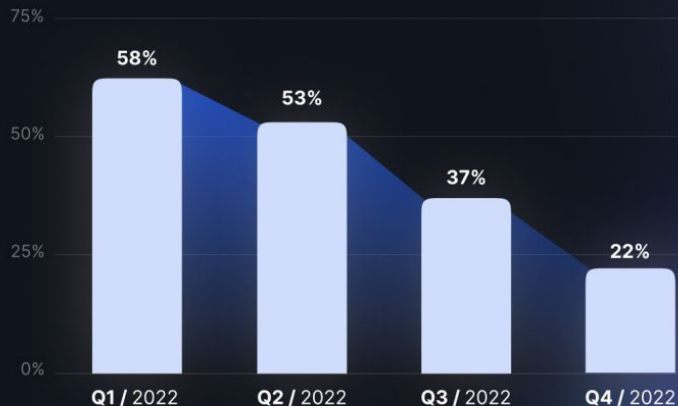
CEO

Gradient Works

Account Coverage in 2023:
Maximizing Impact with Dynamic Books



% Sales Reps Who Hit Quota in 2022



'22 attainment
was **terrible**.
(And Q1 didn't get better)

Teams have shrunk.

Pipeline is down.

Time to reset.

**Forget activity, focus on
coverage instead.**

**Pipeline starts with
account coverage.**

The coverage challenge

Marketing

Total Addressable Market

The entire market, given unlimited resources and capabilities.

Serviceable Addressable Market

Market a company can potentially serve, without considering constraints.

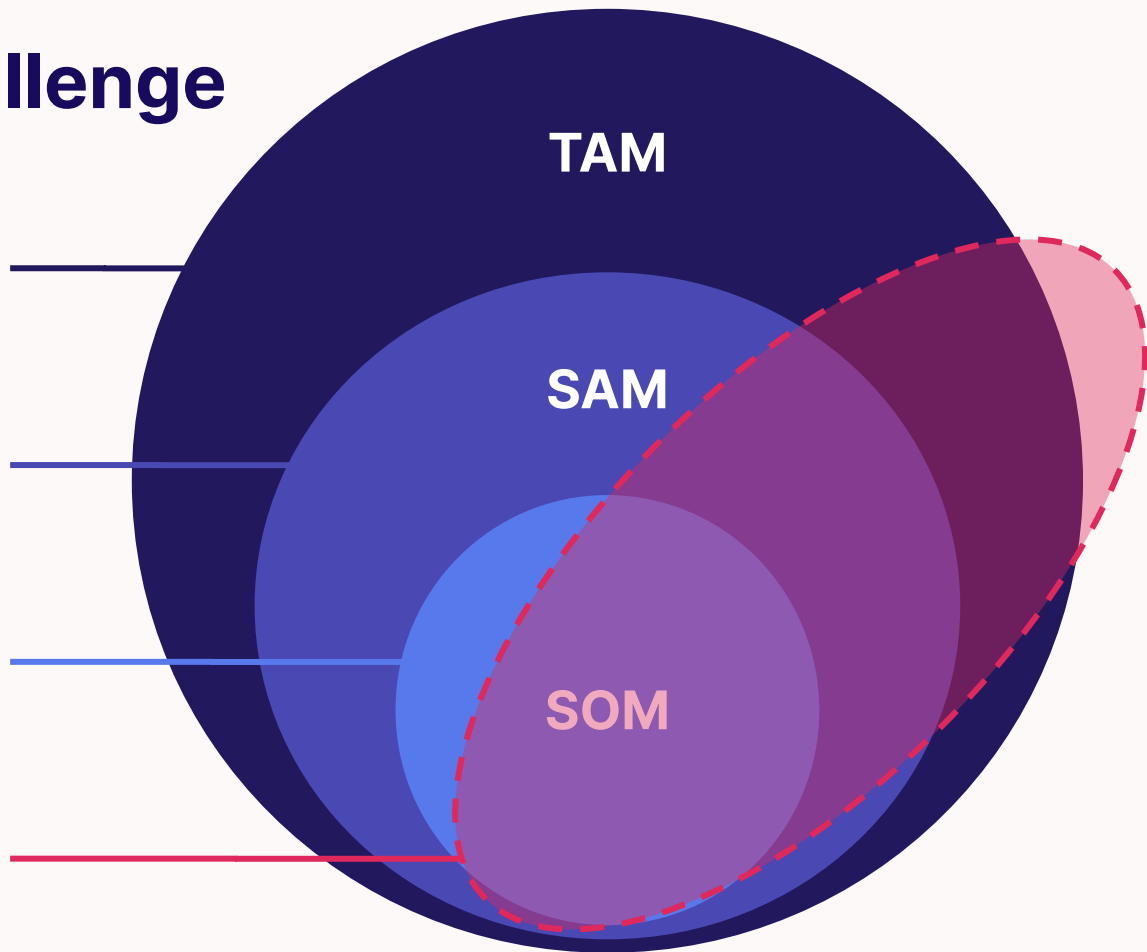
Serviceable Obtainable Market

Market a company can realistically capture and serve given constraints.

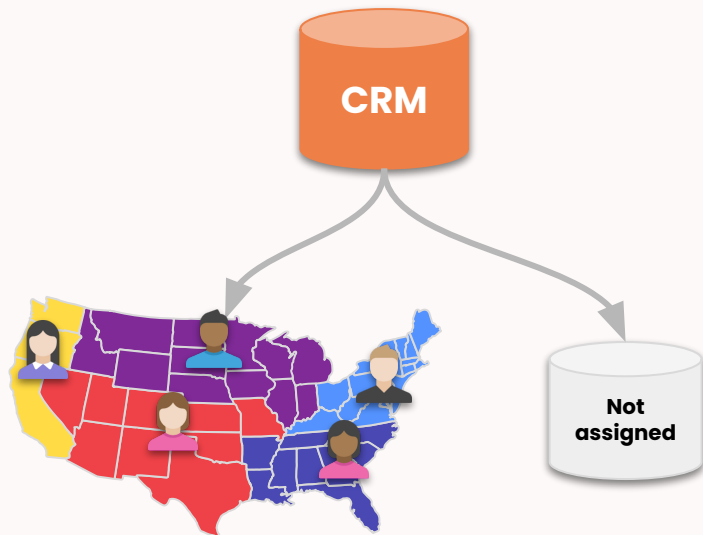
Sales

Your CRM

Everything that's been loaded into CRM over the years, intentionally or not.



Static territories make coverage harder



Unequal opportunity

Some reps can't work all their good accounts, while others fight for scraps in weaker territories

Prioritization problems

Pushes the burden fully onto reps, wasting time and reducing the value of data investments

Execution drag

Static "patches" aren't responsive to market conditions; many sales plays and experiments aren't possible

Coverage black holes

Cumulative impact is misallocated quota capacity causing gaps in market coverage

Dynamic Books model maximizes coverage

Marketing Nurture

Warm up accounts until they're ready to work when rep capacity becomes available.



Inbound routing, buying signals, account distribution

Active Coverage

Assign accounts based on *capacity and lifecycle stage*. Others stay in ready pool.

Ready

Working

Resting - Pause active outreach, start nurture

Resting

Review



Rep disposition, use-it-or-lose-it retrieval

Disqualified - Remove unworkable accounts

Disqualified

Review - Evaluate issues with data quality, fit, timing

Coverage Principles

- **Accounts › activity**

Focus effort on the best fit, highest timing accounts; activities don't become pipeline, accounts do.

- **Shared responsibility**

Marketing, ops and sales all play a role in proper coverage

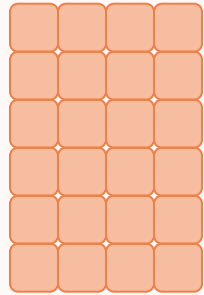
- **Continuous adjustment**

Coverage must be actively managed; it's not a once-a-year process

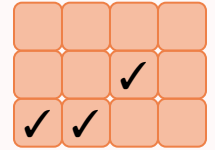
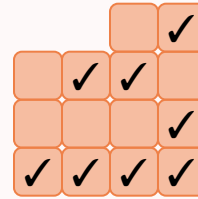
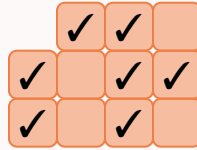
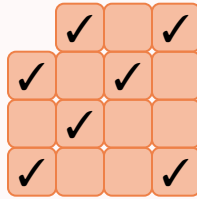
3 things to do now



1. Integrate rep-level account coverage into every 1:1
2. Identify “black holes” in your market coverage
3. Inject flexibility in account assignment

Rep Perspective

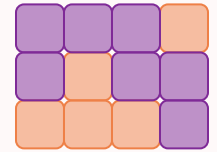
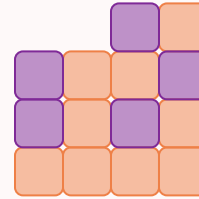
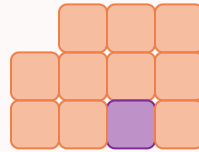
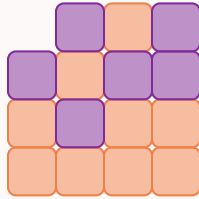
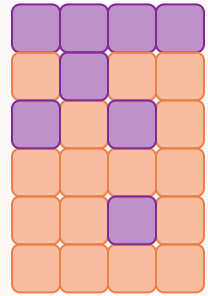




Not
Assigned



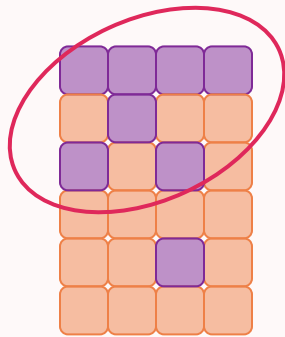
 = Account
 = Engaged

Market Perspective






 = Account
 = Priority

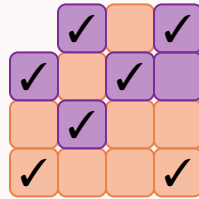
Combined Perspective



Black Hole

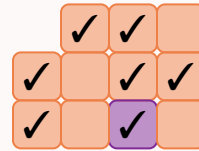
Distribute to reps with capacity to engage these accounts.

-  = Account
-  = Priority
-  = Engaged



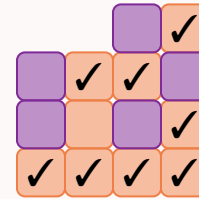
Strong coverage

Say good work! Consider "returns" process



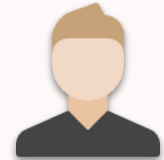
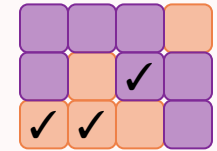
Low opportunity

Give them more priority accounts to work



Poor prioritization

Coach them to focus on better accounts



Low coverage

Push for more activity; consider "retrievals"

Rep Coverage Checklist

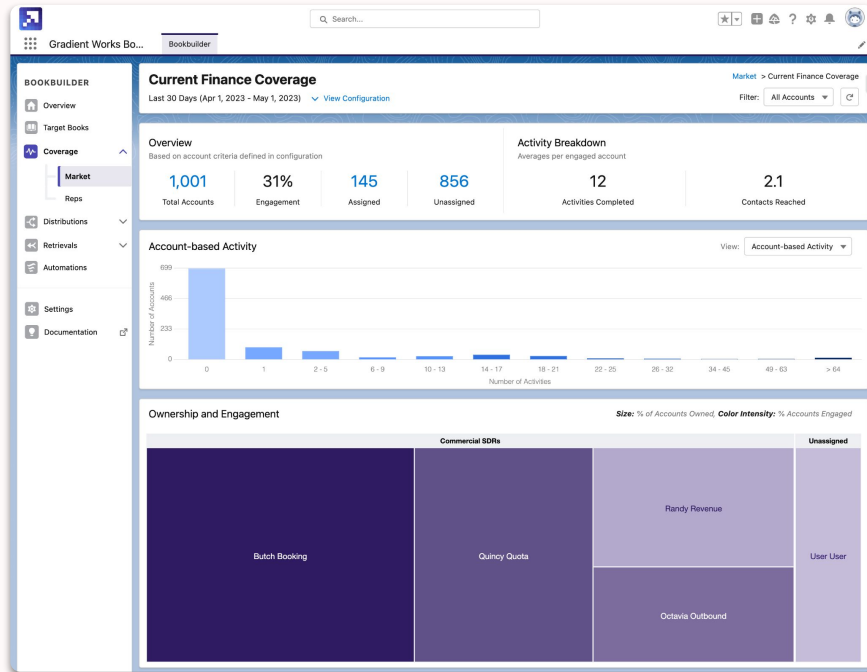
- Build and use consistent rep-level coverage reports
- Ensure multi-threading with enough contacts and performing sufficient activities per account
- Validate that they're directing their efforts towards priority accounts
- Evaluate enablement issues if good coverage but poor results

The screenshot shows the BookBuilder interface for a user named Chloe Closer. The interface includes a sidebar with navigation options like Overview, Target Books, Coverage, Market, Reps, Distributions, Retrievals, Automations, Settings, and Documentation. The main content area displays an 'Account Engagement Overview' with key metrics: 99 Total Owned, 74% Engagement (Percentage), 3.9 Activities Completed (Avg Per Account), 1.6 Contacts Reached (Avg Per Account), 1 Off Book Engaged, and 26 Target Book Unengaged. Below this is an 'Account Summary' table with columns for Account, Fits Target Book?, Activities Completed, Emails, Calls, and LinkedIn. The table lists 26 accounts, each with a 'Yes' or 'No' status for 'Fits Target Book?' and corresponding activity counts.

Account	Fits Target Book?	Activities Completed	Emails	Calls	LinkedIn
Allen-Pacheco	Yes	12	3	3	6
Alvarez, Pierce and Baker	Yes	5	1	1	3
Barnes, Quinn and Abbott	Yes	1	0	1	0
Barnes-West	Yes	3	0	2	1
Bauer, Stewart and Skinner	Yes	19	7	8	4
Boyd, Santos and Gilbert	Yes	1	0	1	0
Bradley, Melendez and Gonzal...	Yes	2	0	0	2
Brown and Sons	Yes	4	1	1	2
Bryant, Wood and Carter	Yes	2	0	2	0
Campbell, Garcia and Lee	Yes	2	0	1	1
Cooper Inc	Yes	2	1	0	1
Davis-Garcia	Yes	1	1	0	0
Davis-Scott	Yes	4	2	1	1
Delacruz Group	Yes	5	3	1	1
Dominguez, Mitchell and Moore	Yes	1	0	1	0
Ellison-Olson	Yes	13	3	6	4
Flores, Shaw and Barker	Yes	2	0	2	0
Flores, Taylor and Johnson	Yes	2	1	0	1
Freeman and Sons	Yes	1	1	0	0
Garcia, Griffin and Robinson	Yes	1	1	0	0
Garrett Group	Yes	1	0	0	1
Gay, Franklin and Mills	Yes	2	1	1	0

Market Coverage Checklist

- Build coverage reports for specific high-priority market segments
- Look for high-priority accounts that aren't currently assigned
- Evaluate individual rep coverage levels and messaging for priority accounts and consider coaching or revising the plan if necessary



Coverage Principles

- **Accounts › activity**

Focus effort on the best fit, highest timing accounts; activities don't become pipeline, accounts do.

- **Shared responsibility**

Marketing, ops and sales all play a role in proper coverage

- **Continuous adjustment**

Coverage must be actively managed; it's not a once-a-year process

Thank you!

gradient.works/books

Ang McManamon

VP of Sales
Crunchbase

How to Keep Your Team Motivated and
Focused Through These Difficult Times



Three areas to focus on

1. Transparency – more visibility into the business = more trust

Pink – #F0235B

Blue – #186A5C

Purple – #7E2C87

2. Expectations – clearly defined achievable goals

Dark Pink – #F0235B

Light Blue – #268B87

Dark Purple – #3E2440

3. Money – spiff & incentives

Medium Pink – #F0235B

Light Blue – #268B87

**Expectations –
clearly defined
and achievable
goals**



Money – spiffs & incentives

- Early quota attainment or pacing achievement – individual and team
- Total # of deals sold (SMB / MM)
- Increased ACV or who can close the largest deal
- Team milestones (clearly defined goals)
- Increased win rate
- Increased number of opportunities
- Highest performer
- Forecasting accuracy – closest to the pin

-
- \$\$\$
 - An extra day off
 - A staycation for rep and partner / \$1000 weekend spend
 - Higher accelerator on deal payouts

Fireside Chat

The New World of
Revenue Generation



**Stephanie
Cox**

CEO
Lumavate

**Sam
Jacobs**

Founder & CEO
Pavilion



Key Takeaways

- Lumavate uses an account development rep model, instead of traditional AE/SDR
- Get senior talent to talk to prospects – they can make key decisions and commits that average reps can't, so deals accelerate faster
- On her journey from marketing leader to CEO:
 - Understands that cuts to marketing will hurt you long term
 - Imagine yourself in the role and talk to someone with similar career path
 - Use communities to close knowledge gaps and get diversity of thought
 - CEO is biggest marketer for your brand
- Get to “no” faster

Mitch Warner

**Managing Partner & Author
The Arbinger Institute**

Leading Through Uncertainty
Developing Agile & Innovative Teams



Developing Leaders



75%

of organizations do not believe they are effective in developing their leaders

71%

of organizations do not believe their current leaders will help them navigate successfully into the future



We began to understand that the new circumstances we were facing were not just incrementally different from the old one in a way that could be fixed with a new, more intricate set of precise instructions delivered from on high.

Our efficient systems provided us with a solid foundation, but they could not bring us victory.

**Our biggest challenges lay...in the
dizzingly new environment in which we
operate, *and* within the crafted
attributes of our own organization.**

Stanley McChrystal

Our Environment

Market Conditions

- Economic Flux
- Competitive Landscape

Industry Reputation

Government Regulation

Political Climate

Employee Expectations

- Wages/Cost of Living
- Benefits & Perks
- Remote Work
- Social Purpose

Our Environment

Market Conditions

- Economic Flux
- Competitive Landscape

Industry Reputation

Government Regulation

Political Climate

Employee Expectations

- Wages/Cost of Living
- Benefits & Perks
- Remote Work
- Social Purpose

Efficient Systems



Our Attributes

Customer Curiosity

Organizational Agility

Proactive Innovation

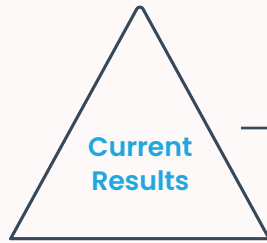
Alignment & Collaboration

Ownership & Accountability

Inclusion & Belonging

Culture

What drives results

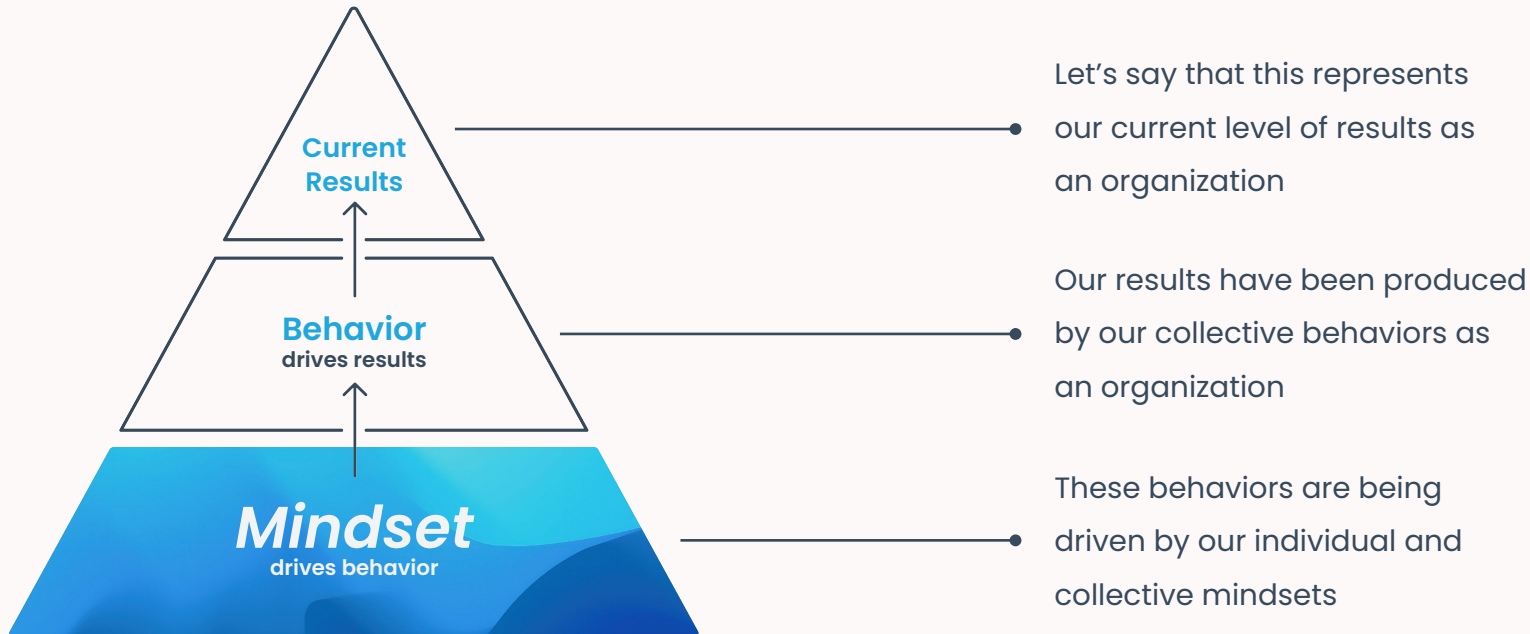


Let's say that this represents
our current level of results as
an organization

What drives results

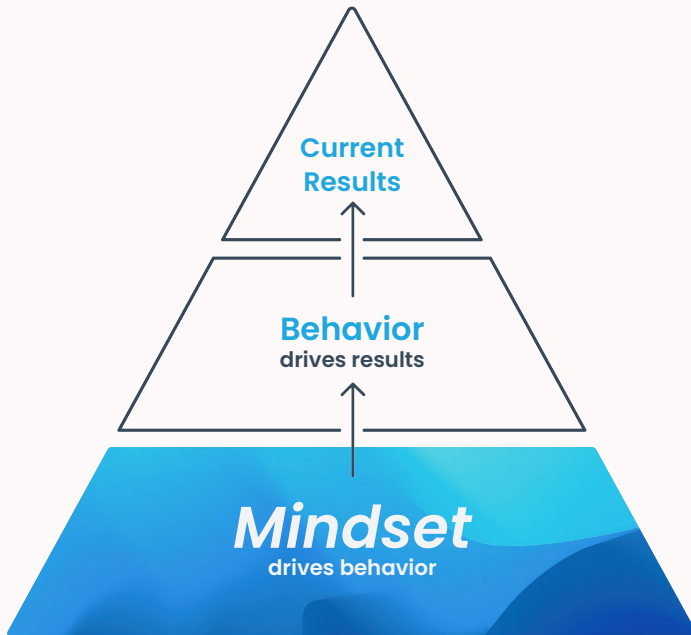


What drives results



Current Environment

New Environment



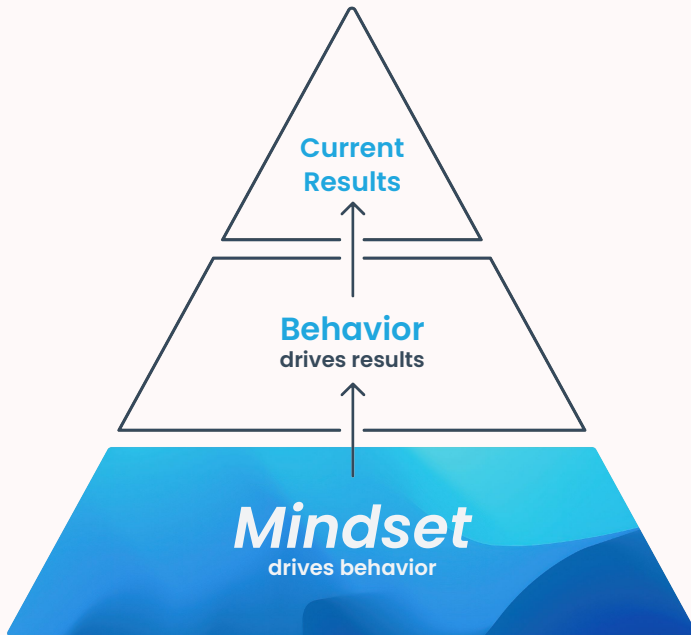
Organizations that identify and address pervasive mindsets at the outset are **four times more likely** to succeed in organizational change efforts than are companies that overlook this stage.

Nate Boaz and Erica Ariel Fox

“Change Leader, Change Thyself,” McKinsey Quarterly, March 2014

Current Environment

New Environment



Two Mindsets

Others
Don't Matter
Like I Matter

INWARD MINDSET



My objectives
& behaviors are
self-focused



~~So their needs,
objectives, and
challenges don't
really matter to me~~

Two Mindsets

Others
Don't Matter
Like I Matter

INWARD MINDSET



My objectives
& behaviors are
self-focused



Others are
Objects

- ▶ **Vehicles** that I use
- ▶ **Obstacles** that I blame
- ▶ **Irrelevancies** that I ignore

Two Mindsets

Others
Don't Matter
Like I Matter

INWARD MINDSET



My objectives
& behaviors are
self-focused



Others **Matter**
Like I Matter

OUTWARD MINDSET



Others are
People



Their needs,
objectives &
challenges
matter to me

Two Mindsets

Others
Don't Matter
Like I Matter

INWARD MINDSET



My objectives
& behaviors are
self-focused

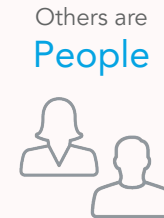


Others **Matter**
Like I Matter

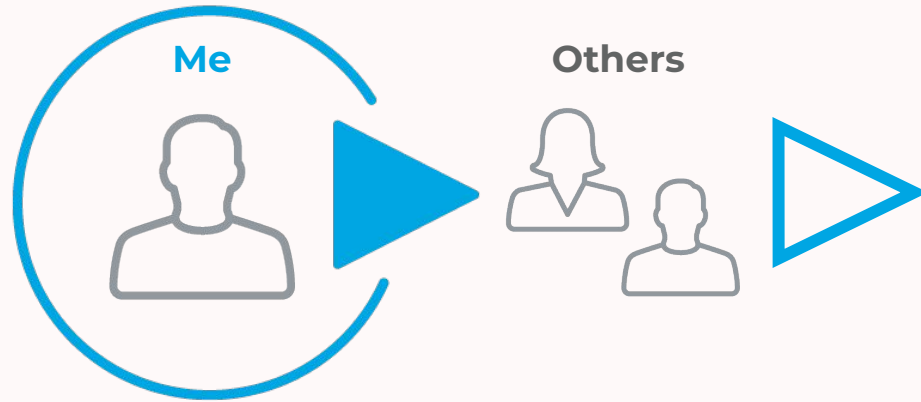
OUTWARD MINDSET



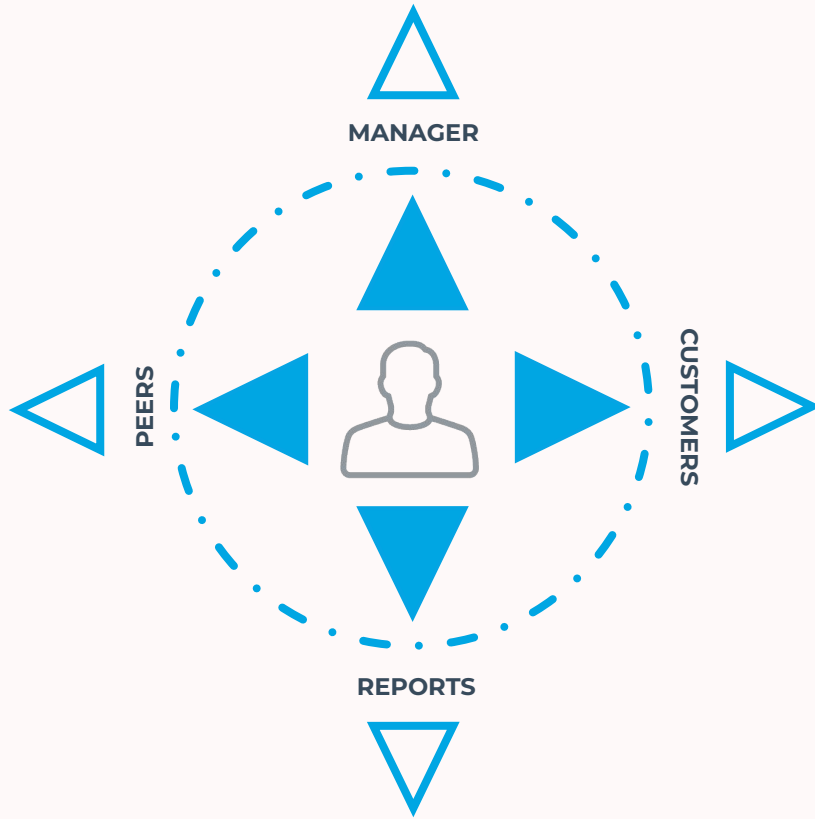
My objectives
& behaviors take
others into
account



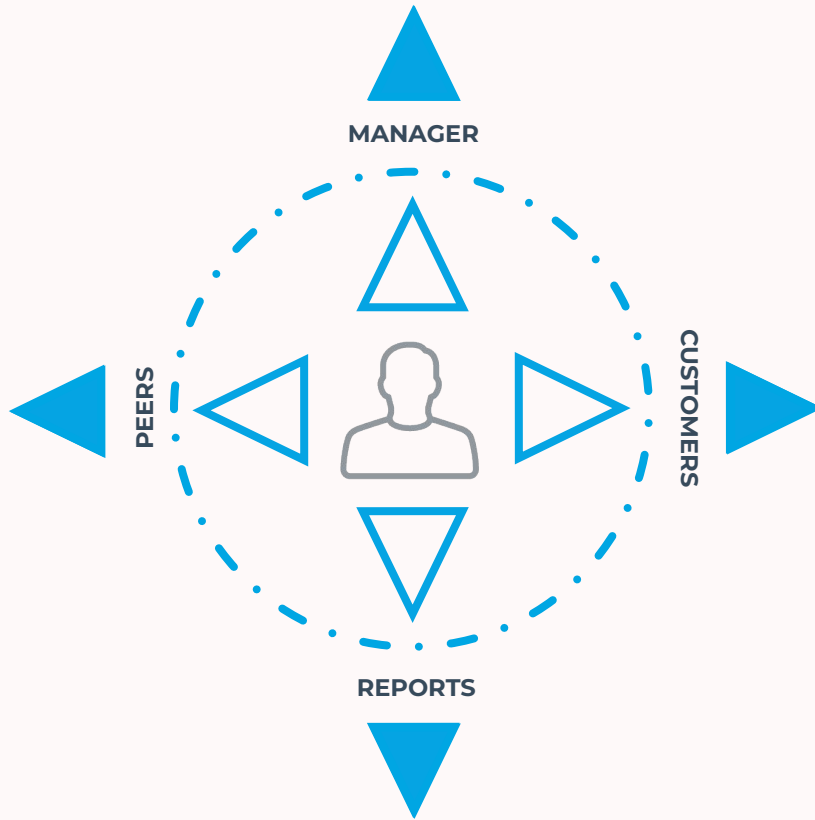
Their needs,
objectives &
challenges



**What does it look like
to envision a job with
an outward mindset...**



These “inside triangles” represent our or own work and objectives



The “outside triangles” represent others’ work and objectives

The Outward Mindset Pattern (S.A.M.)

1 See Others

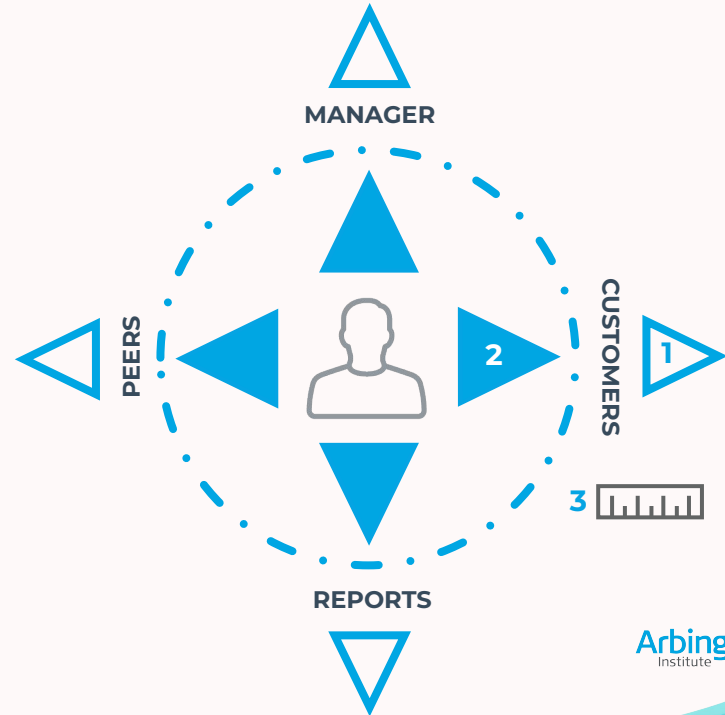
Strive to understand others' needs, objectives, and challenges.

2 Adjust Efforts

Given what I learn about others, adjust my efforts in order to be more helpful.

3 Measure Impact

Measure and hold myself accountable for the impact of my work on others.



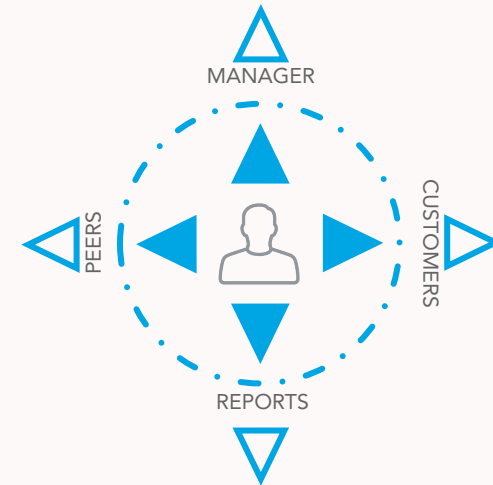
Inward Mindset

I Focus Only on **My** Results



Outward Mindset

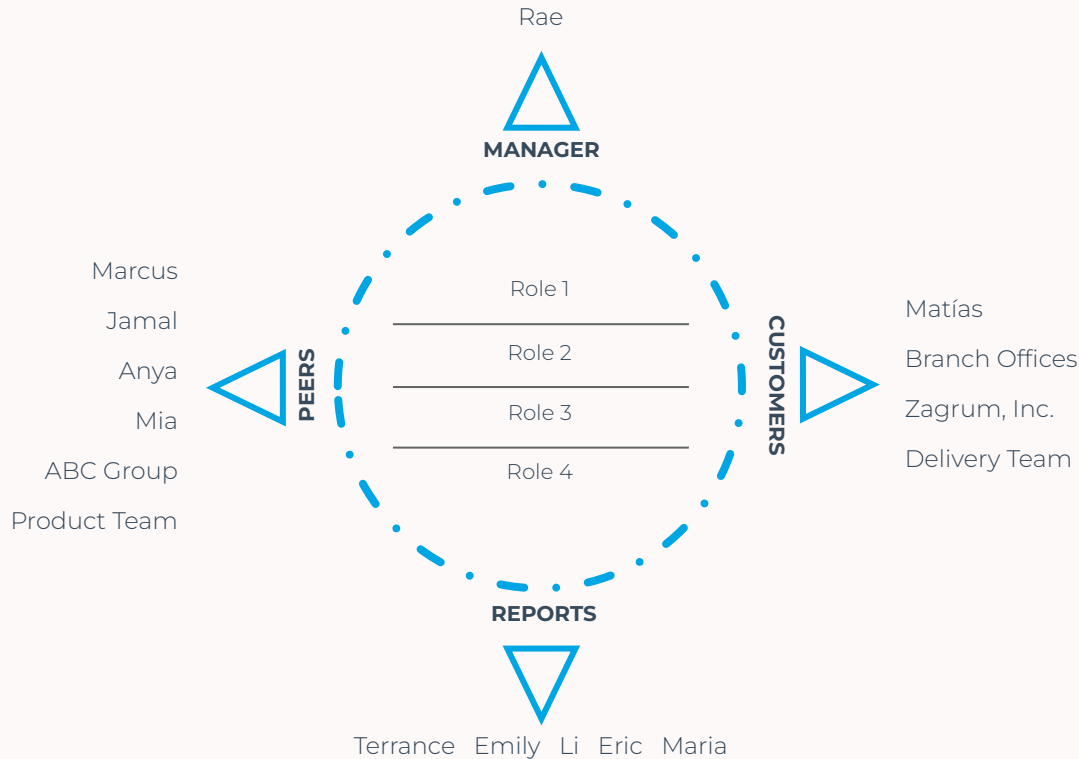
I Focus on **Our** Results





My Job Map

My Job Map

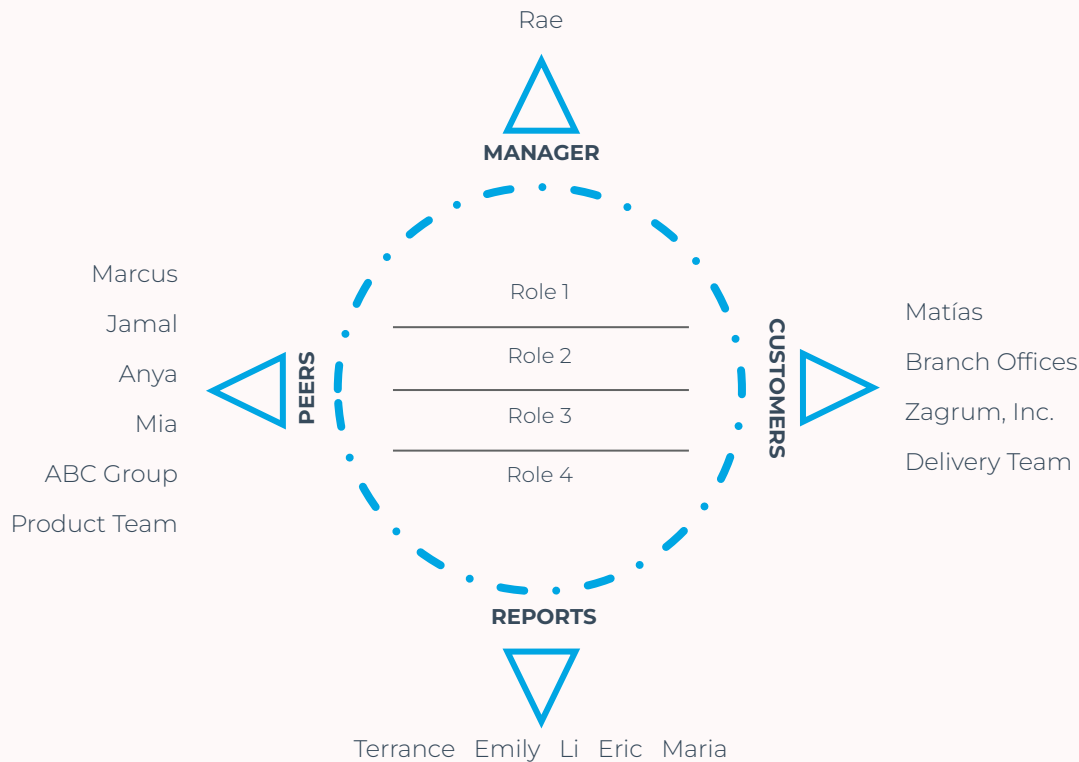


List up to four main roles or areas of responsibility.

Consider your various roles and identify the people you impact most in each direction.

For each person use a 0—10 scale to rate how well you understand your impact on their work. Write that score next to their name.

My Job Map



To improve our impact
in each direction, we
will apply the **Outward
Mindset Pattern
(S.A.M.)** to our jobs...

S | see others
A | adjust efforts
M | measure impact



Applying S.A.M. to My Job

The 3 Questions

To apply S.A.M., ask the 3 Questions of those you impact:

- **See Others:** How does someone in my role affect or potentially affect your ability to do your work (both positively and negatively)?
- **Adjust Efforts:** From your perspective, how could a person in my role be most helpful to you?
- **Measure Impact:** How and at what frequency would you like me to check in and stay accountable to you for my impact on your ability to do your work?

My Action Plan

Given what I've learned, what next steps do I need to take?

As an organization, ask:

How well do we really know what our customers are trying to accomplish?

Do we anticipate what our customers will want to accomplish but haven't yet articulated—even to themselves?

Is our mindset fully outward so that we are more eager to adapt than prove we were right?



For access to additional leadership insights,
scan the QR code above.



Arbinger
Institute

Wrapping Up

Sam Jacobs, CEO & Founder



Thank you to our sponsors



Calixa



Current offers

1. LinkedIn #ElevateRKO engagement giveaway
2 free tickets to GTM2023
2. Today only join or renew for 2 years
Get 35% off your Annual Membership plus 1 ticket to GTM2023
3. LinkedIn #ElevateRKO engagement giveaway
10 tickets to saastr Europa

Upcoming summits

 Pavilion
CRO SUMMIT²³
15% off registration
Promo code: RKO15




GTM²⁰²³
15% off registration
Promo code: RKO15



 Pavilion
CMO SUMMIT²⁴
15% off registration
Promo code: RKO15



The future of Pavilion

AMA with Sam Jacobs

May 18, 2023 09:30 AM EST

We want you, our members, to help us shape the future of Pavilion. Join us for an open AMA with Pavilion CEO Sam Jacobs where we'll recap our vision for the future of Pavilion membership, get your feedback, and answer your questions live.



 Pavilion

ELEVATE

Thank you!