



The Frontline Formula: How to Transform Managers into Revenue Boosters

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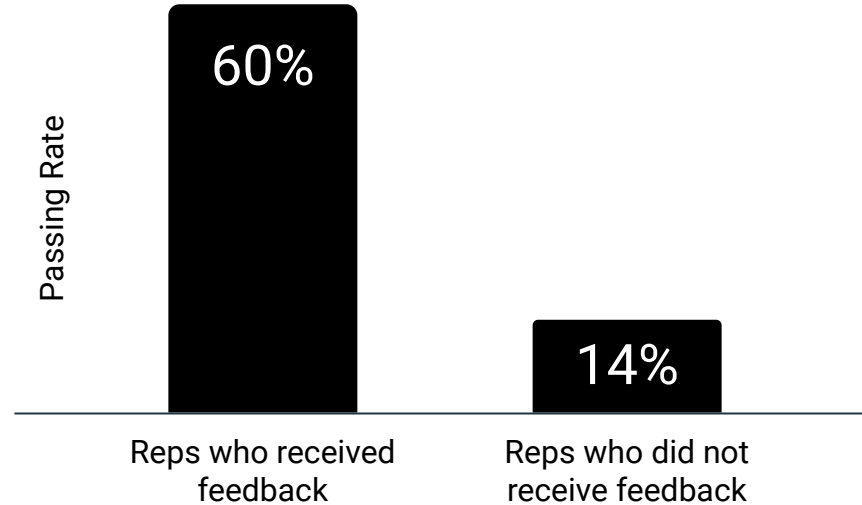


Ian Westbrook
Revenue Architect

WHAT WE KNOW

Coaching impacts behavioral change

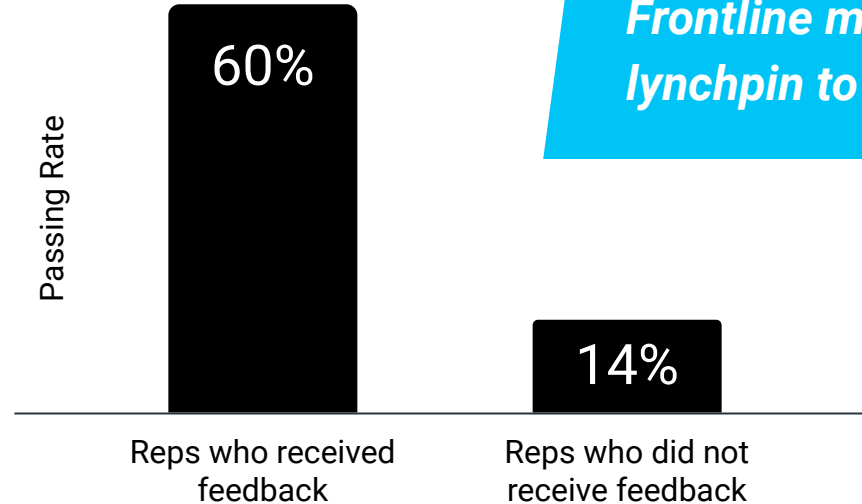
*Public \$650M project
management platform*



WHAT WE KNOW

Coaching impacts behavioral change

*Public \$650M project
management platform*



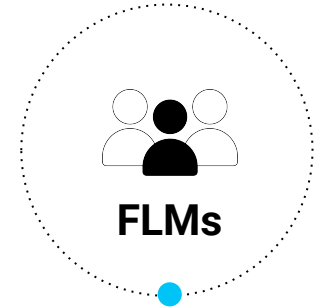
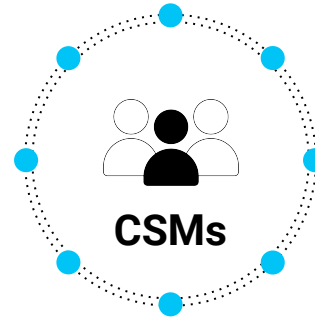
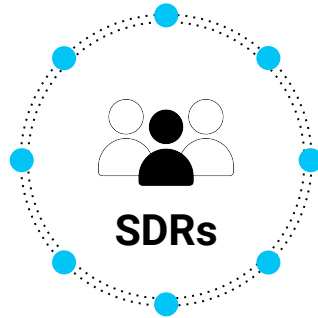
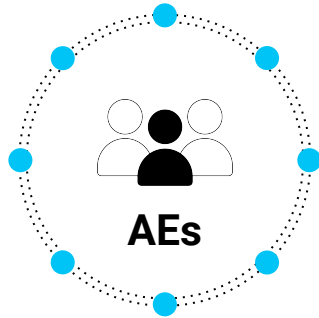
***Frontline managers are the
lynchpin to behavioral change***

THE PROBLEM

WHAT HOLDS US BACK

When it comes to training, FLMs are left behind.

We often enable and train our AEs, SDRs & CSMs,
but FLMs are an afterthought.



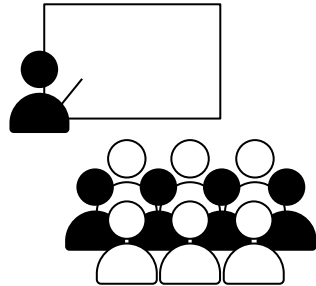
WHAT HOLDS US BACK

Frontline Managers don't know how to coach.

Why? Because we never taught them.

Individual Contributors

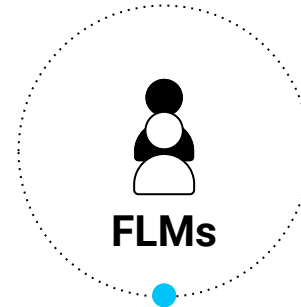
Consistent support with recurring training



AEs, SDRs, CSMs

Front Line Managers

Typically one-time training upon promotion (at best)

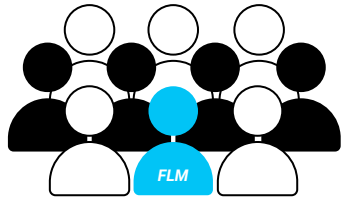


WHAT HOLDS US BACK

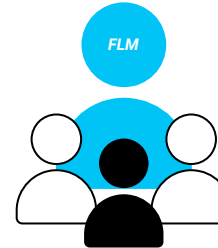
Org structures are changing

Enablement has fewer resources, so managers are crucial to helping fill the gap

With resources,
Enablement and FLMs together
have more support

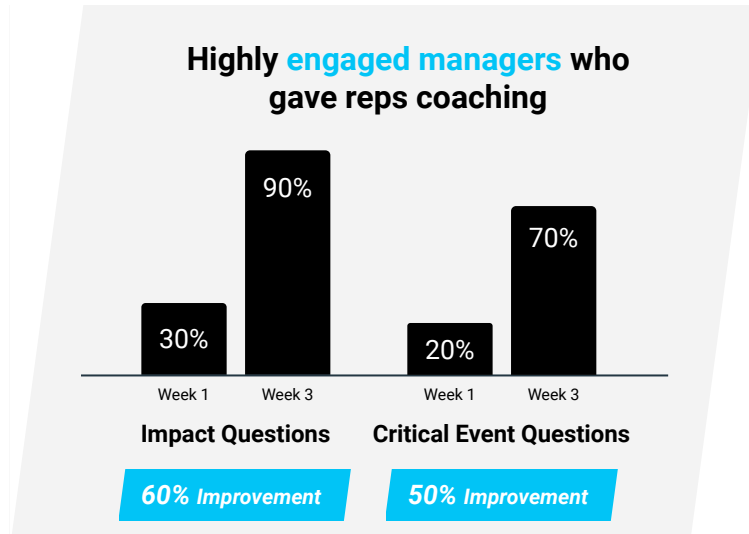


Without resources,
FLMs become even more crucial for the success
of training / enablement programs



WHAT HOLDS US BACK

Training programs won't stick unless you get buy-in from the FLMs.



The Method for capturing untapped potential from your FLMs

1. THE WHAT

Train your Managers on the key skills they need to master in order to become coaches

*Revenue Academy Course:
Managing for Impact*



2. THE HOW

Give your managers guidance with turn-by-turn directions

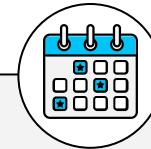
Manager Playbook



3. THE WHEN

Give your managers a guide to know what to do when, and embed it into their weekly rhythm

Manager Operating Cadence



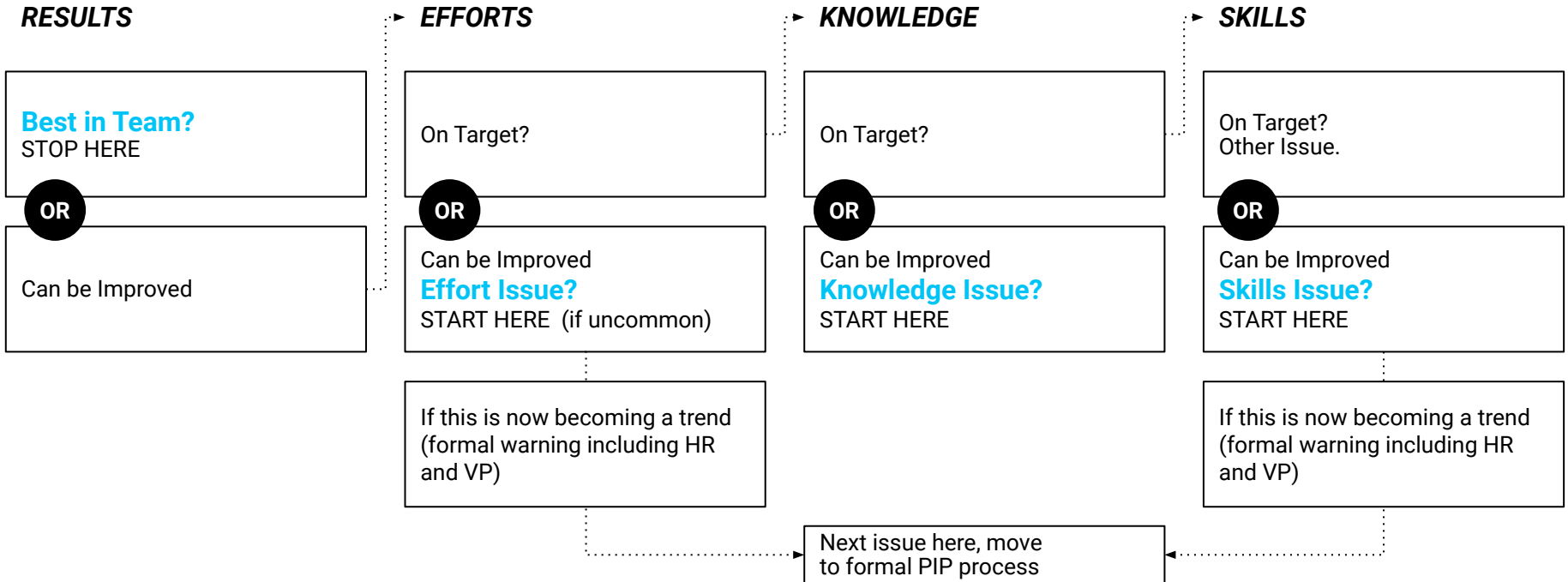
01

THE WHAT



*MANAGING
FOR IMPACT*

REKS - Results, Efforts, Knowledge, Skills



YOUR TURN



***What's one result that you're
trying to work on with your team?***

Real World Examples



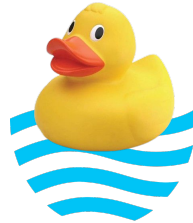
How REKS can be embedded at scale

Ian Westbrook
Revenue Architect in Residence

Centralized REKS dashboard
for measurement and visibility

Aligning the FLMs and broader
org on what to measure

Building in empathy and sophistication
for different segments and regions



HOW TO COMBAT

“The Advice Monster”

02

THE HOW



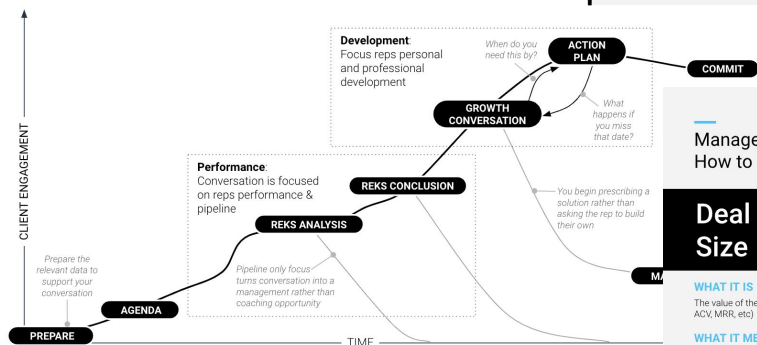
***MANAGER
PLAYBOOK***

A “just-in-time” guide for managers

How to Coach on Key Skills

Blueprint

Manager & Rep 1-on-1. Skills/Performance Conversation



TIP Reps don't like being told how to do their job, ask them how they are going to solve their own challenges

Manager Diagnosis.
How to Coach Your Reps

Deal Size

WHAT IT IS

The value of the deal expressed in the measurement of choice (ARR, ACV, MRR, etc)

WHAT IT MEANS

This is the average net deal value as compared to average and price list. This is key measurement of a reps ability to sell value. It is more insightful for value based selling but even with defined price lists is a good gauge.

WHAT YOU SHOULD CONSIDER

Review closed deals to average across the team and price list to see how the rep compares. Above average and at or above list is a good sign a strategic value seller. More often we see the opposite which is widely varying deal sizes (depending on pricing discipline of the company) and substantial reductions to lists price. You should also review terms in this consideration as \$50K now is more valuable than \$50K over the year etc assessing critical event and decision making process.

IF DEAL SIZE IS SMALLER THAN AVERAGE

If a rep has an average deal value that is lower than the team or company average and/or a substantial discount to price list.

Take the last few deals closed and review together with the rep. How was price presented, when was it presented, what negotiations happened, what happened to the price through the process?

With those answers as context you should be able to get to the route of the problem and start to define an resolution plan.

COMMON ROOT CAUSES

The most common issue with inexperienced reps is the lack of discipline and desperation leading to a "just get it done" attitude.

The second most common is the inability to match price to value. When you diagnose serious pain and impact for a business you should be pricing in relation to that from a business case ROI perspective and in those cases "list price" becomes irrelevant.

For example if you are solving a \$10M problem you shouldn't sell your solution for \$10K.

Another common issues is when pricing was given **too early and prior to proper discovery** and diagnosis, so you have anchored the prospect to a lower number before identifying how much pain they are in and scoping the deal.

The last one most common in enterprise sales is the professional buyer (executive or procurement) **Iterated on the negotiation through multiple stakeholders** or multiple rounds of concession and the lack of discipline from the rep eroded the deal value.

For more guidance reference the "trade blueprint" in the sales playbook.

A “just-in-time” guide for managers

Context & Pain ●●●○

Identifying Pain & Impact

IDENTIFYING PAIN & IMPACT

Situational Coaching

IF REP VALIDATED A YES

- What is the company's urgency driver?
- What changes in circumstances would cause the company to move forward on an opportunity?
- Did the decision maker articulate this driver? Key influencers?
- Is there a consensus on the urgency across all stakeholders?
- Given internal approvals, will [CUSTOMER NAME] meet the timeline expected by the company? What unexpected factors may delay approval beyond the company's expected timeline?

SUGGESTED NEXT STEPS AFTER A YES

- Gather information that might allow [CUSTOMER NAME] to move quickly when a solution is required.
- Communicate to your manager and our internal development teams that this opportunity will be moving forward.
- Set up a calendar reminder to contact the company at a future date and communicate this to your contact(s).
- Follow-up with the company at regular intervals to ask what opportunities have come up since the last communication.

SUGGESTED NEXT STEPS AFTER A NO

- If there is not a sense of urgency, are we sure the customer is serious?
- Is this a real opportunity for [CUSTOMER NAME]?

YOUR TURN

Who had a deal slip this past quarter?

NOT MUCH **or** OFTEN **or** WAY TOO MUCH

03
















THE WHEN



***OPERATING
CADENCE***

03 | OPERATING CADENCE

Coaching Cadence

	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY
					
					
					
	Daily Standup Meeting	Weekly Team Meeting	Weekly 1:1	Exec Team Meeting	
Who	BDR, SMB/MM AE	ALL	ALL		
Timeframe	10-15 minutes 	30-45 minutes 	30 minutes 		
Frequency	Daily	Weekly	Weekly		
Purpose	Practice and hone core skills Facilitate peer coaching	Share critical news Review forecast Share wins/learnings Discuss market insights	Review performance Coach and develop skills Share wins/learnings Discuss career path		
	<small>not distribute - Winning by Design™</small>				4

04

- 00 Introduction
- 01 Vertical/Regional Weekly
- 02 Impact: Deal Review
- 03 Impact: Success & Risk Mitigation
- 04 Forecasting
- 05 The 1:1
- 06 Tools
- 07 Assets
- 08 Additional Meetings

Forecasting

04 Success & Risk Mitigation

OPERATIONAL RHYTHM | Key Components of an Operational Rhythm

Hygiene is the result of rigorous review and incessantly beating the drum around critical deal details. Focusing on the same level of detail for all deals will ensure that pipelines are consistently scrubbed each week so that leaders can make informed submissions in the forecasting process.

Hygiene Category	Example Probing Questions
Stage	<ol style="list-style-type: none"> How long has this deal been in the current stage? What is stopping this deal from progressing to the next stage? What is your action plan to move this deal to the next stage? When do you expect this deal to move to the next stage? Why did the deal stage change?
Strength	<ol style="list-style-type: none"> Why is the deal strength so much higher/lower than the stage that it's in? Is this deal strength in line with the expected close date? What aspects of the deal are causing the deal strength to be so low? Why did the deal strength change?
Status and Next Steps	<ol style="list-style-type: none"> Why is the most recently activity more than 7 days ago? Has the next step been entered on the opportunity? What was the last logged activity on this deal? Has a next meeting been planned?
Close Date	<ol style="list-style-type: none"> What are the open items left on this deal before we are closed? Can we finalize all open items in time to meet the expected close date? Is this deal going to land in quarter or should we move it out? Why do I have deals with close dates in the past? Why did the close date change?
ACV	<ol style="list-style-type: none"> Have you scoped the full value of the deal / use case? For deals without a value, what is your next step to obtain a value? Why did the deal ACV change?

Your Role in the Forecasting Process

Individual Contributor

FLM

VP

Executive Team

Forecasting / Deal Review Use

Understand deal progression and details, set expectations on personal performance, organize deal flow and self prioritization

Outcome

Prioritized on deal next steps, limited personal resources at deals with the best outcomes

Deep dive through all deals to understand entire portfolio at a granular level
Drive discussion and solve complex deal issues

Improved deal velocity, faster qualification, consistent pipeline generation

Sets medium term Superarea targets and identifies broad opportunities in the relevant markets.

Understands the financial health of the business, identifies operational gaps / risks of missing overall targets

Sets long range forecasts and manages investor expectations. Identifies company wide risks
Identify opportunities to sponsor global deals.

More informed to manage long range resourcing and strategic decision making process

02

OPERATIONAL RHYTHM | Key Components of an Operational Rhythm

Deal on a Page

Leverage a common language to diagnose a deal with the goal of forecasting more accurately, prioritizing time and deals to drive repeatable success. Challenge by asking follow up questions such as how do we know the information? is it cross referenced / triangulated? how?

NNL

GROWTH

CS

S
SITUATION

1. Where are we in the deal stage?
2. What is the value?
3. Who are we talking to, department and person?
4. Scope of the deal-what are we selling?
5. Are 3rd parties (agencies) active, if so how?
6. What feedback have we received on our product/services so far (fit)?

P
PAIN

1. Why do they want to change from the current?
2. What is the type and severity of the pain?
3. What is the specific technology or process pain?

I
IMPACT

1. Emotional pain - What is the personal/prof importance of this impact to prospect
2. Rational Pain - What is the size of the impact to department or company? What does the Business gain by changing?
3. Are we aligned to their outcomes?

CE
CRITICAL
EVENT

1. Have we defined a pre-defined critical event date with defined consequences
2. Have we established a mutual agreement on a negotiated critical event based on joint understanding of the process

D
DECISION

1. Who else are they considering, and under what circumstances?
2. Are we delivering anything the competition cannot?
3. Why would they choose us?
4. The decision process is defined, understood and being followed
5. Do we know the people involved in a decision?
6. Do they believe we can help then achieve the outcomes above?

Example Questions under 'SPICED'

Example Answers

- They are currently manually pulling stats into Excel
- Pain is preventing work
- Insight into where they should be spending their time
- Ability to develop the KPI's as well as measure consistently against these
- Need to be live before contract expires 12/31, product launch, fiscal year
- Need to be live by xx/xx date so much sign by xx/xx
- Here is our defined procurement plan
- You are being included at every stage in process as new stakeholders are included and as you rise up in the org

What We Recommend

*Give FLMs the skills on
HOW to coach*

*Capture hearts and minds,
by co-creating the playbook
WITH them*

*Coaching must be built into
their operating rhythm*

What We Recommend

*Give FLMs the skills on
HOW to coach*

**'Managing for Impact'
open courses offered
every month**



*Capture hearts and minds,
by co-creating the playbook
WITH them*

**Manager Playbook for
just-in-time guidance**



*Coaching must be built into
their operating rhythm*

Operating Cadence



Revenue Enablement Access Pass

**Give your enablement team access to templates
of all of these assets, to build their own programs**



How to get in touch

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THANK YOU

