ATRIUM & SCALE

Put Me In Coach:
Data-Driven Sales Coaching

Creating a culture of data-driven coaching in modern sales orgs.
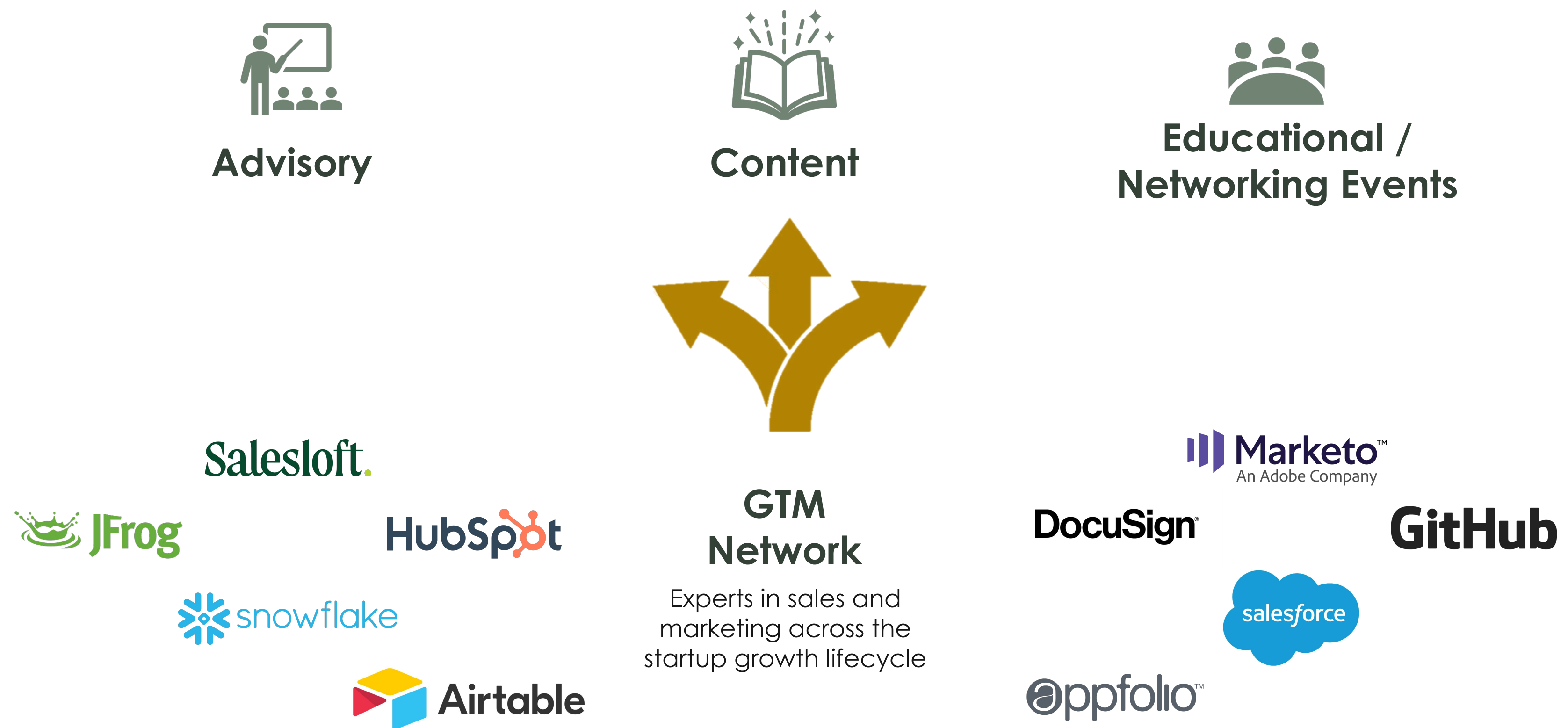
SCALE

GTM Platform Introduction

We help our portfolio build and optimize hyper-growth GTM machines

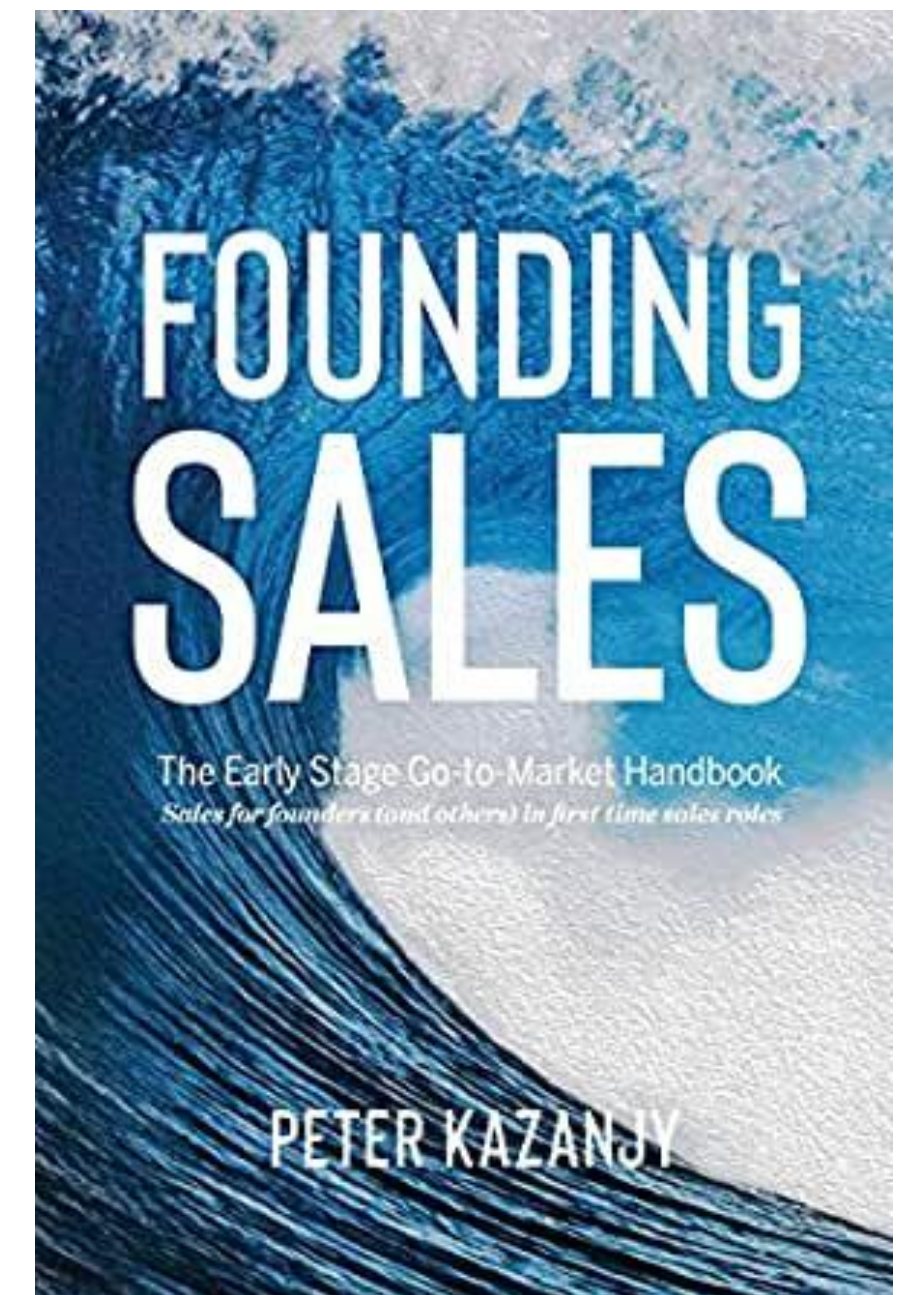# The GTM platform leverages our expert network to provide a suite of offerings

Advisory

Content

Educational / Networking Events

GTM Network

Experts in sales and marketing across the startup growth lifecycle

Salesloft.

JFrog

HubSpot

snowflake

Airtable

Marketo™
An Adobe Company

DocuSign®

GitHub

salesforce

ppfolio™

Introductions

Pete Kazanjy
Co-Founder & CRO

ATRIUM

MODERN SALES PROS

FOUNDING SALES
The Early Stage Go-to-Market Handbook
Sales for founders (and others) in first time sales roles

PETER KAZANJY
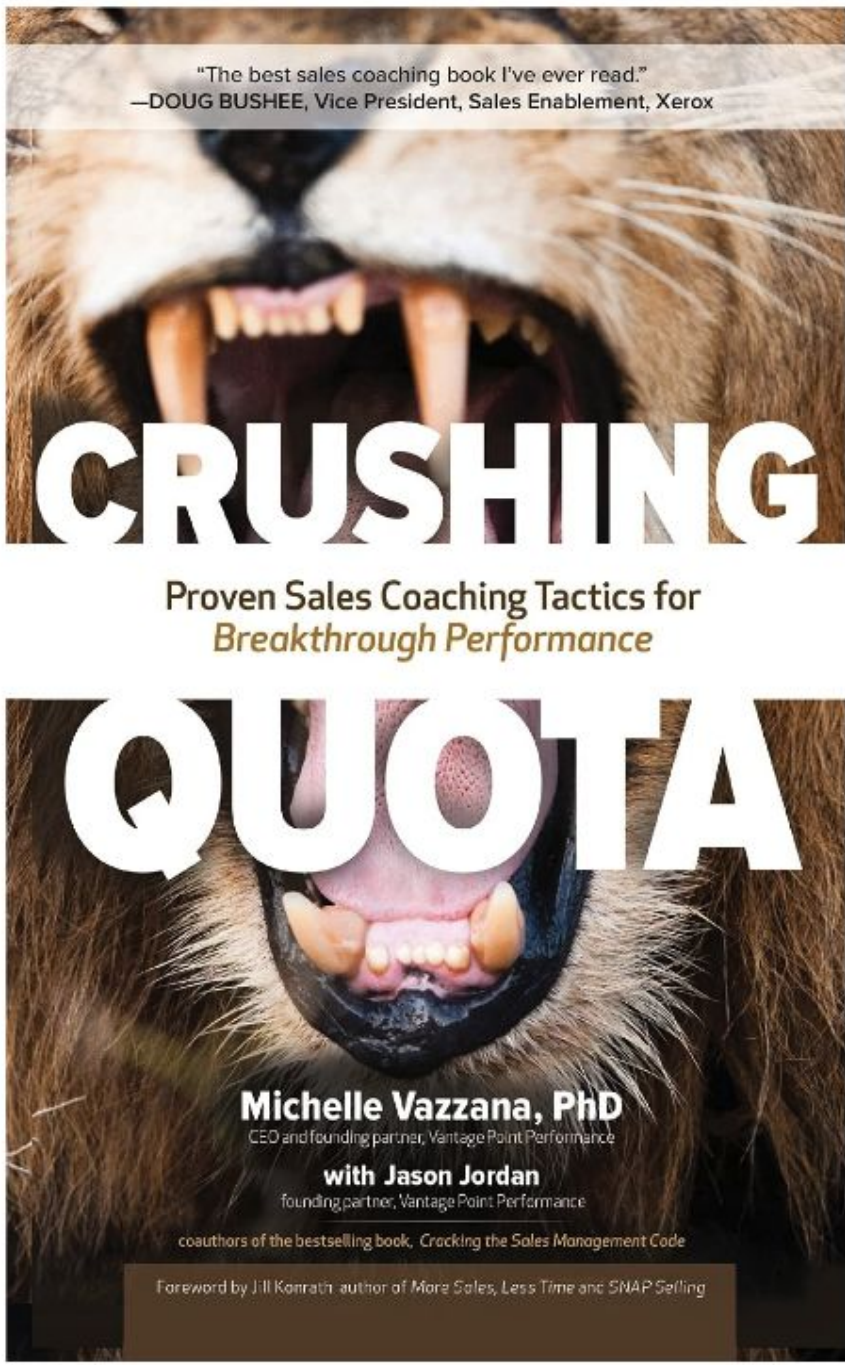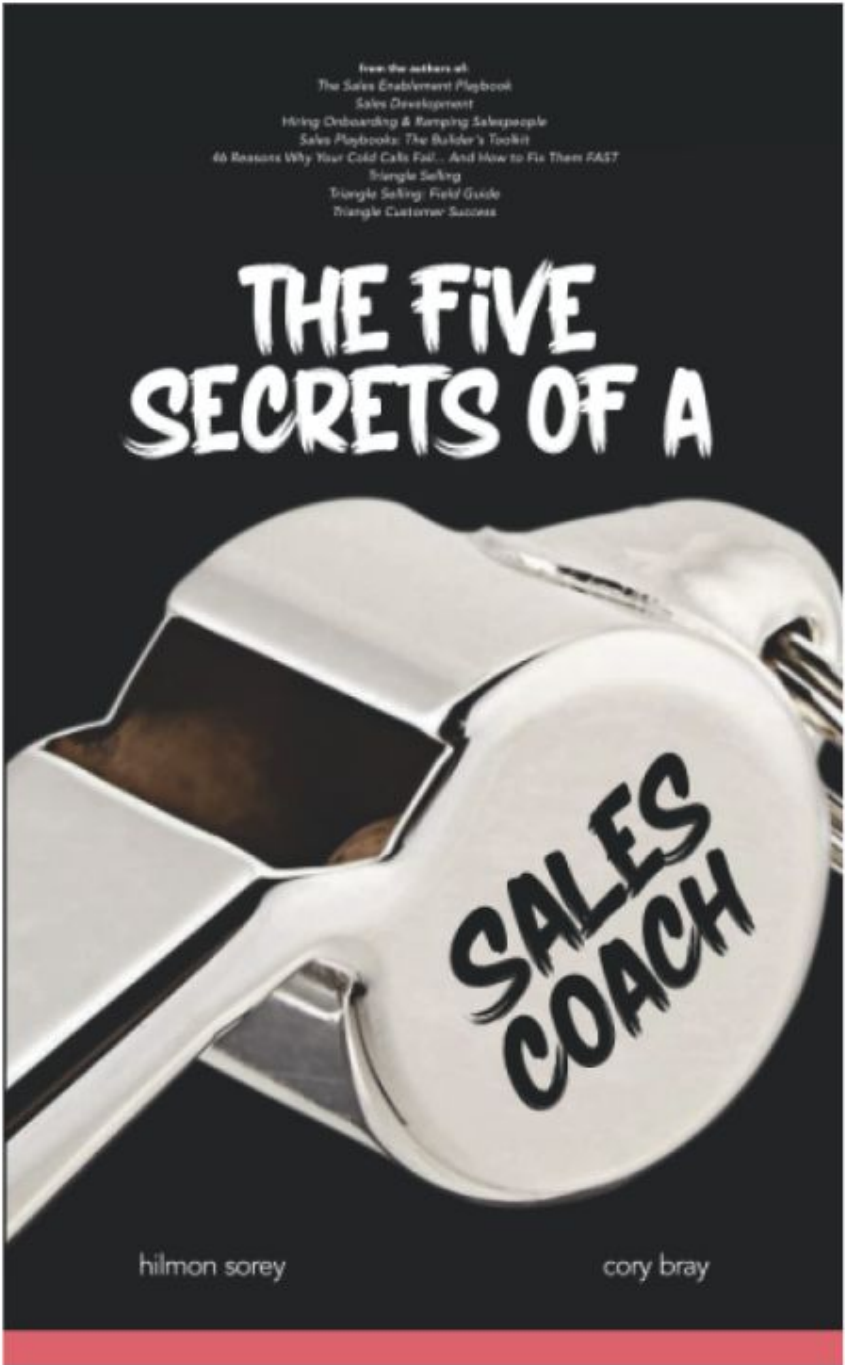
My favorite coaching resources of late... Check the chat!

Why managers should coach

"High performing managers are the difference between team success and failure." **Gartner**®
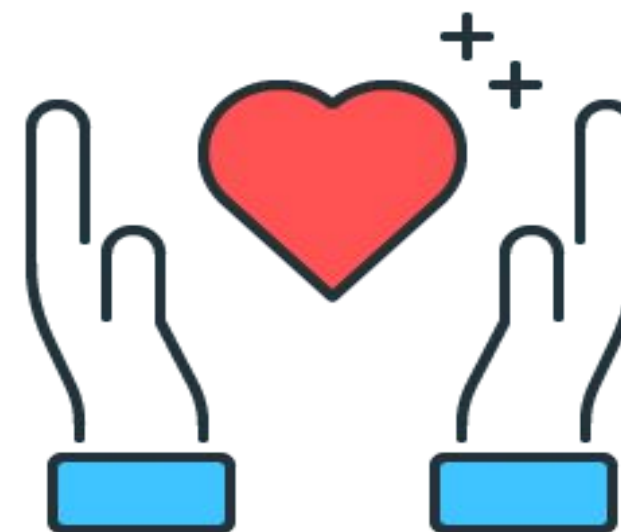
26% higher rep productivity

Reps are 3x more likely to be top performers
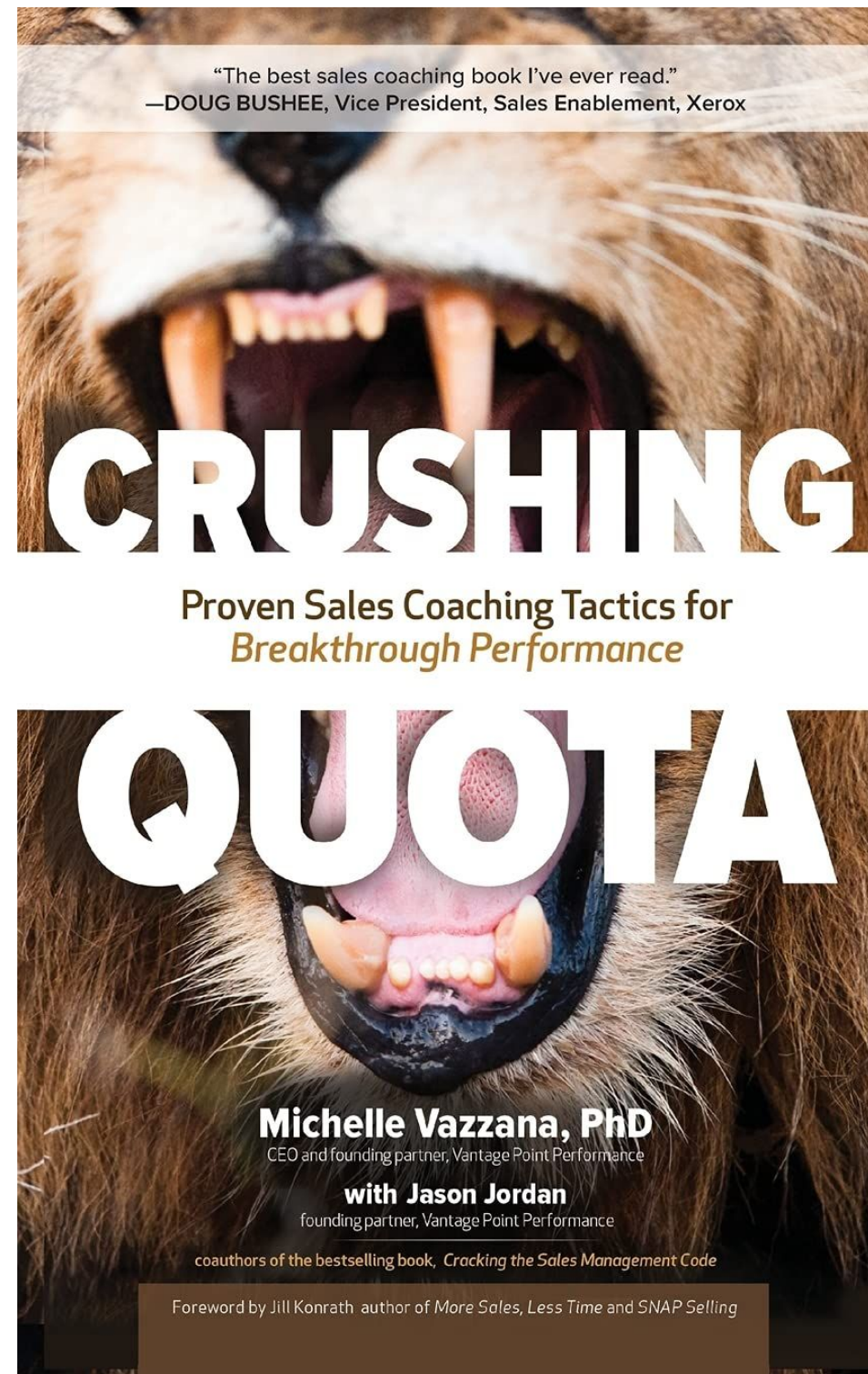
80% better rep retention

38% higher rep effort

Managers are your sales team's secret weapon...enable them.

Why managers should coach

○ Top 25% managers generate **39% more revenue** than bottom 25%. On average **$3.5m more attainment.**

○ Top 25% managers got **30% more reps to quota.**

○ Organizations who engaged in effective coaching realized **8% more revenue** across their teams.

○ Companies that **allocated 50%+** of their training budgets **to managers** drove **15% more revenue** to goal.

⚙️ How to build a <u>data-driven sales culture</u> from the ground up.

*Modern sales orgs aspire to use **data** to properly **empower** Front Line Managers*

🤝 Align

✅ Select key org priorities to be managed.

📊 Choose metrics by which to measure those initiatives.

🎯 Set goals on input and output metrics for initiatives.

💪 Embed

🚧 Construct relevant data assets for managers to manage from.

☢️ Embed assets into managerial operating rhythms.

🏃 Train managers to interpret & manage from data assets.

🚀 Empower

📅 Managers recurrently leverage data assets in operating rhythm.

🔍 Managers track progress to and completion of goals.

🩺 Managers interpret assets and root cause issues to fix with their reps.

🔬 Managers self-serve "next questions" by manipulating data assets.
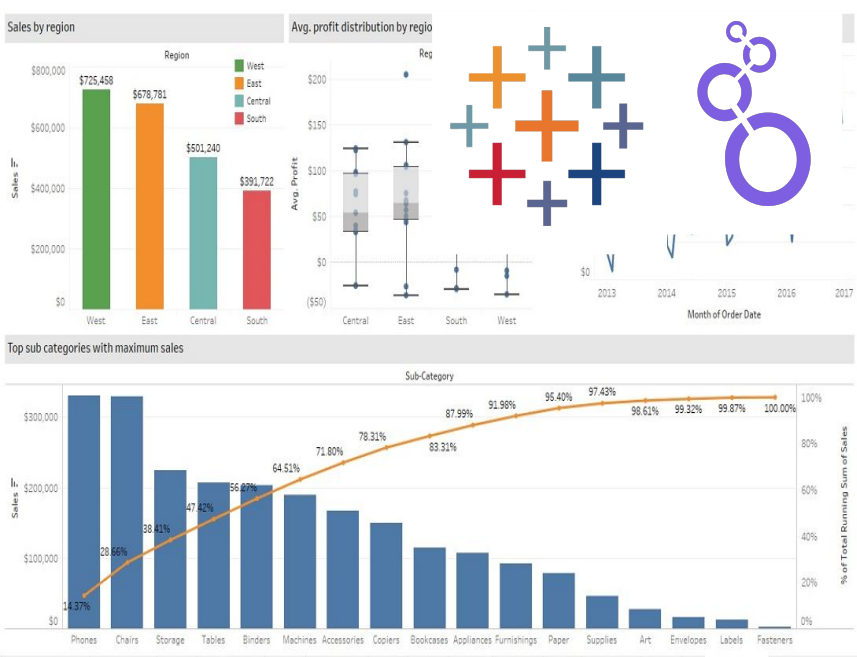
🤦 *If only it was this easy.*

Managers lack the <u>training</u> and the <u>tools</u> to succeed

Manager enablement is an afterthought

- Most tools focus managers on a forecast instead of how to **improve it**

- Enablement resources go to reps first

- Managers are often recently promoted ICs

- Data analysis is **not** an organically acquired skill

Walls of Charts to Decipher

CRM, BI, and Tool-specific dashboards, oh my!

What managers should be doing

Think of all the things managers should be doing...but don't

Deal Inspection & Strategy

Rep Goal Tracking

Data-Based 1:1s

Monitoring New Hire Ramp

Issue Identification & Fixing

Standardizing Success of Top Performers

🤯 *And 50 other things that soak up their time…personality management, rep training, internal meetings, remote reps, a pandemic...*

What managers typically end up doing

What's coming in this month? Where's the Hilton deal at? Can we pull that forward? Can you up that forecast?

Deal Inspection & Strategy

Deal Inspection & Strategy

Deal Inspection & Strategy

Deal Inspection & Strategy

Deal Inspection & Strategy

Deal Inspection & Strategy

🤯 *Deals. Deals.*

Why use data?

It's the only way to get leverage and get out of anecdata.

Riding along on calls is **low leverage**. Are you on the right call?

Remote staff impacts "organic instrumentation."

Closing deals for your reps is **low leverage**. There's only one of you.

Listening to hours of calls is **low leverage**.

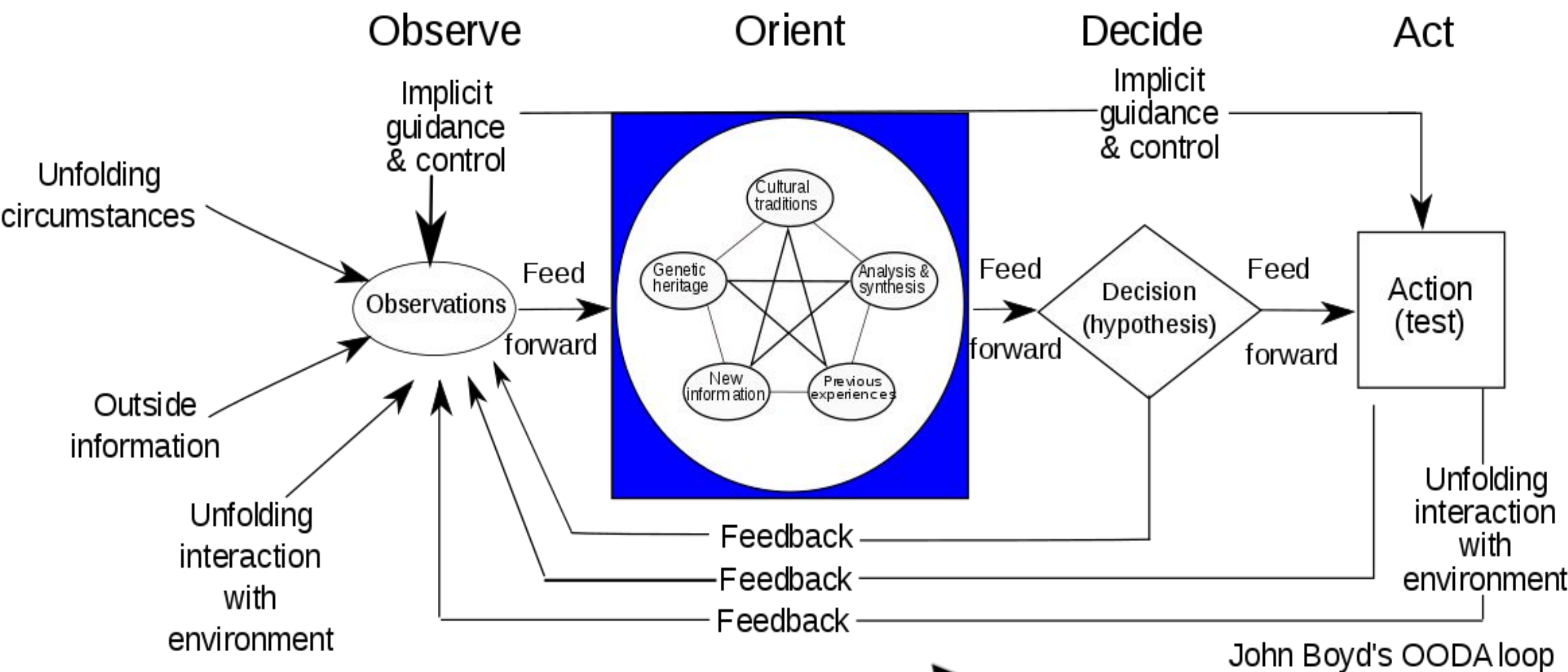Recurring deal inspection only shows you a deal-by-deal snapshot.

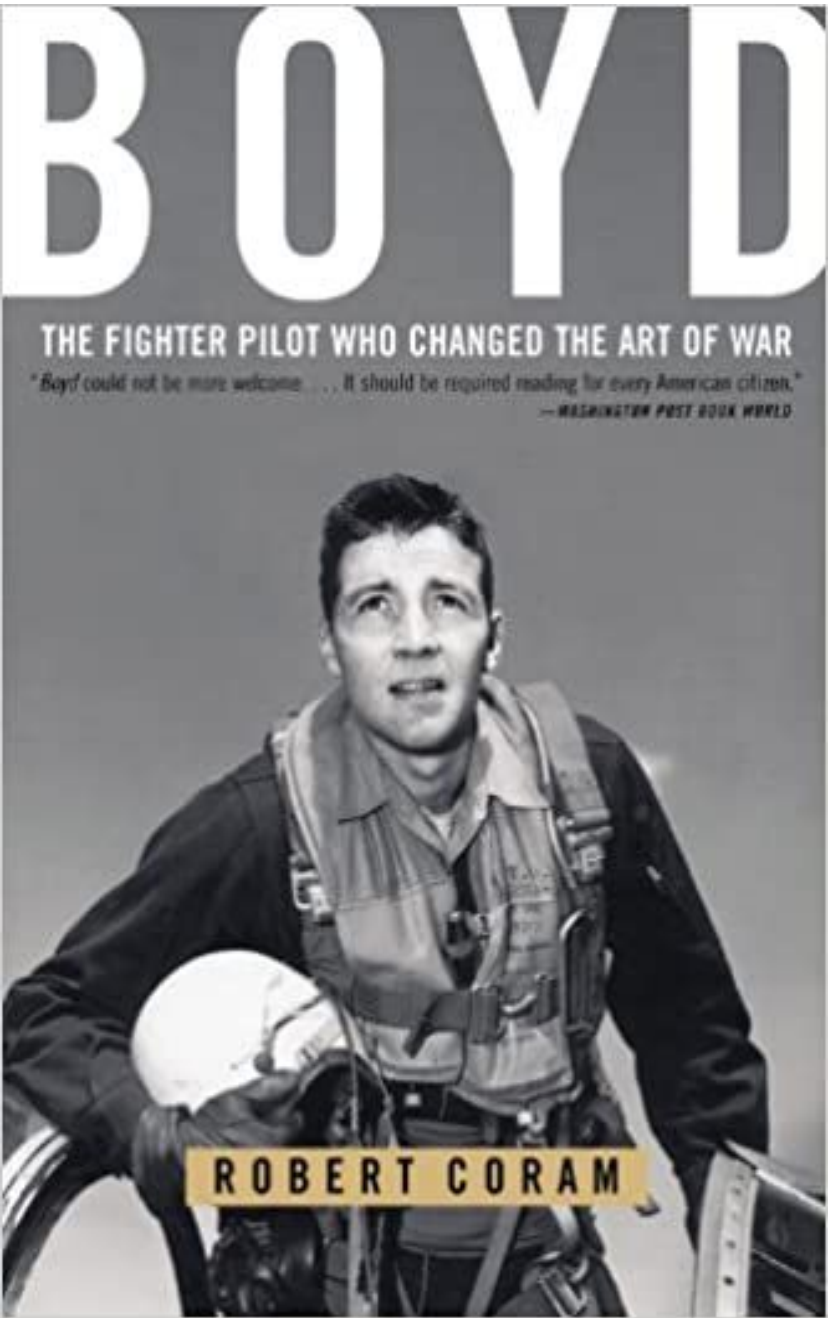With data, you can track the feedback loop to see if management is working.
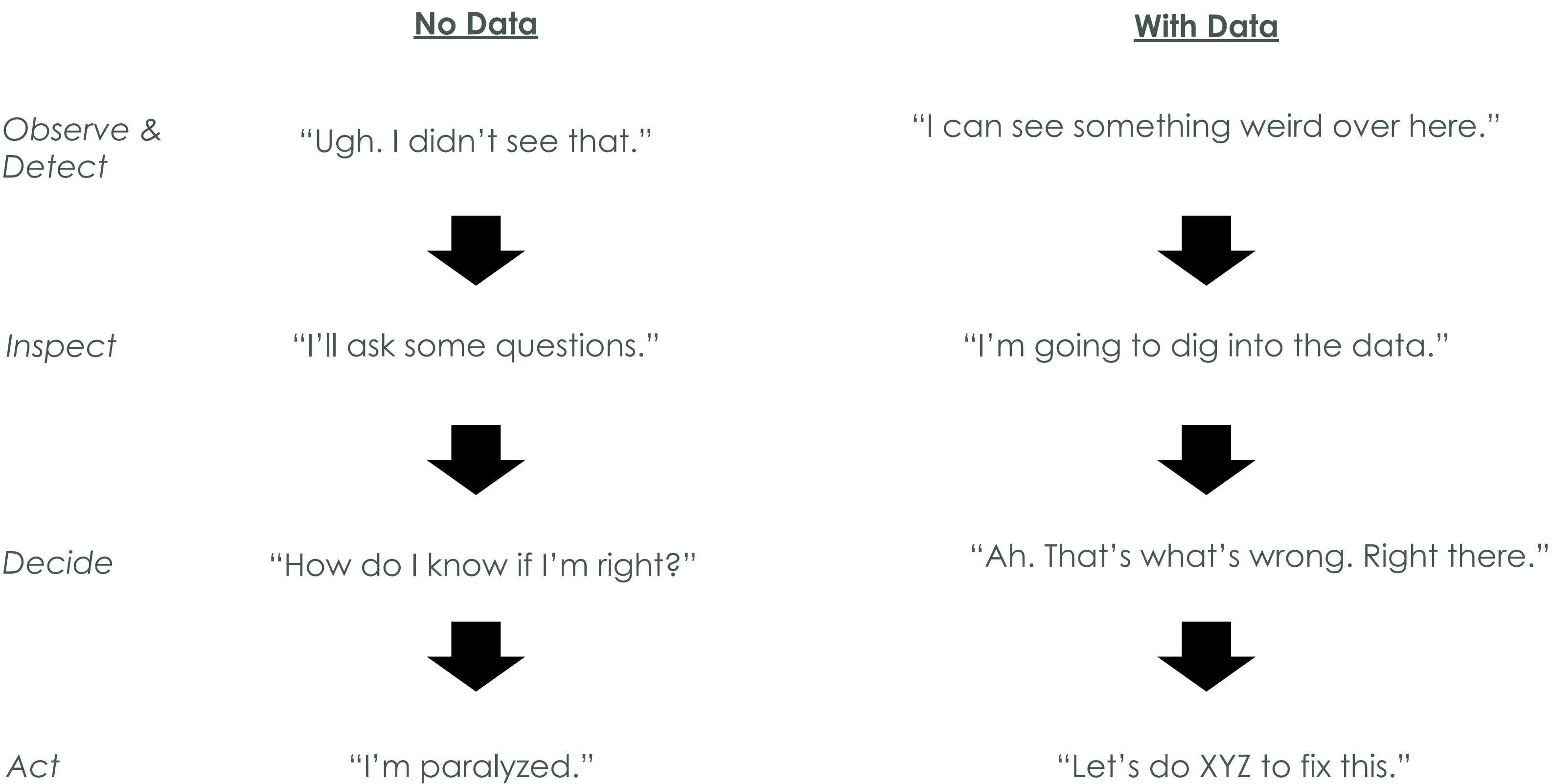
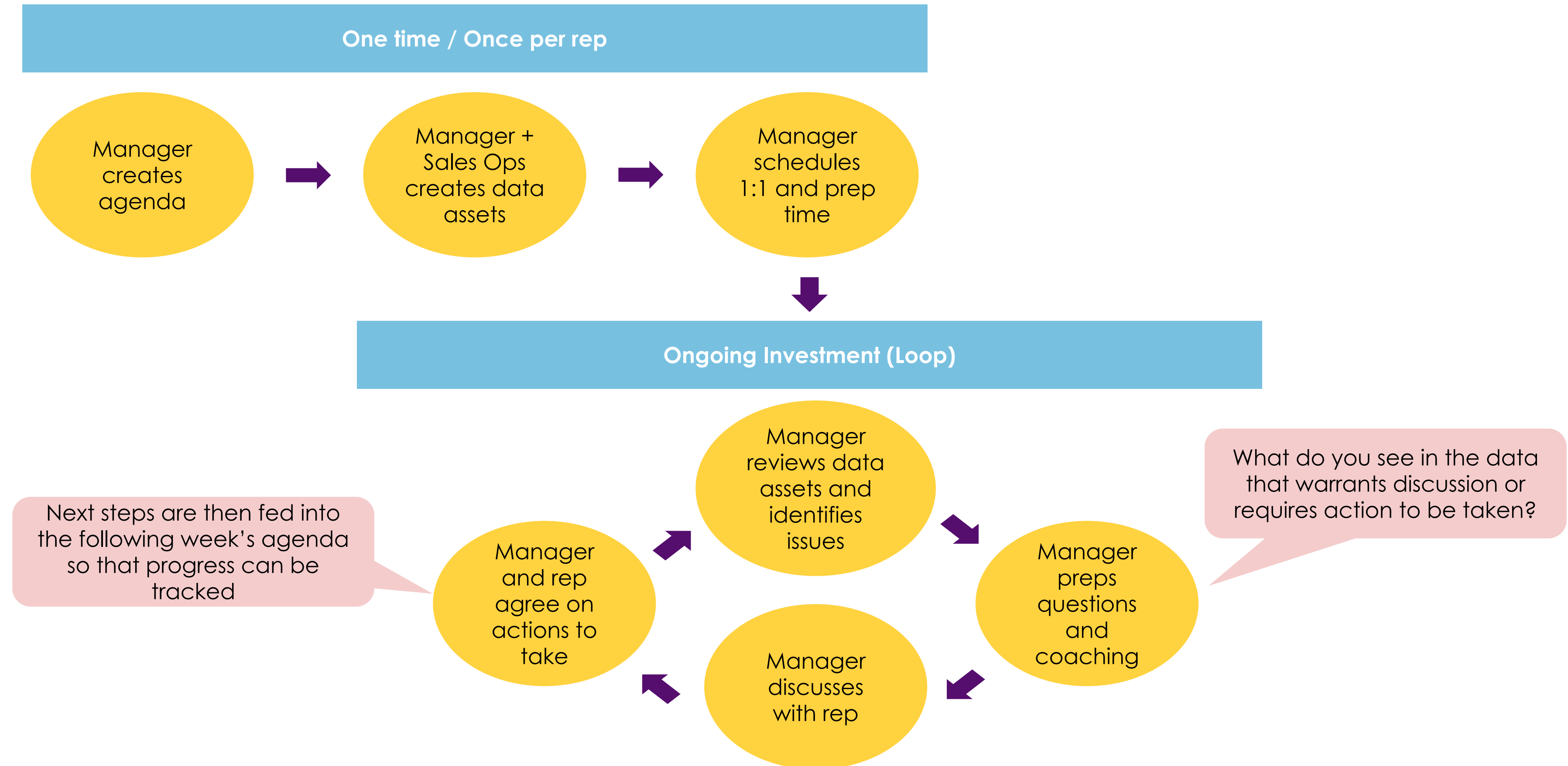With data, you can see around corners.

Observe. Orient. Decide. Act.

John Boyd's OODA loop

OODA in Sales Management

	No Data	With Data
Observe & Detect	"Ugh. I didn't see that."	"I can see something weird over here."
Inspect	"I'll ask some questions."	"I'm going to dig into the data."
Decide	"How do I know if I'm right?"	"Ah. That's what's wrong. Right there."
Act	"I'm paralyzed."	"Let's do XYZ to fix this."

How this looks in practice

One time / Once per rep

- Manager creates agenda
- Manager + Sales Ops creates data assets
- Manager schedules 1:1 and prep time

Ongoing Investment (Loop)

- Manager reviews data assets and identifies issues
- Manager preps questions and coaching
- Manager discusses with rep
- Manager and rep agree on actions to take

What do you see in the data that warrants discussion or requires action to be taken?

Next steps are then fed into the following week's agenda so that progress can be tracked

Some Coaching Methodologies: ClozeLoop C.O.A.C.H

Challenge

Outline

Action Plan

Consequences

Hold Accountable

What is coaching vs not?

Not Coaching	Coaching (with data)
"When's the Lockheed deal coming in?"	"What's concerning you about the Lockheed deal? I've noticed we seem to **only be engaged with <u>three</u> contacts** there."
"Can you make this forecast bigger?"	"I've noticed that your **forecast is pacing behind**. Ideas on things we can pull forward? Or to avoid this situation in the future?"
"I need you to do more activity."	"I've observed your **meeting volumes** over the last four weeks **have been lighter** than usual. What might be contributing to that?"
"Clean up your pipeline."	"I've noticed that you have a **number of opps** in your pipe that **haven't been touched** in some time. Do those need to be closed out? Or should we think about what we can do to enable you more pipeline management time?"
"Good job last month."	"Great job last month. Did you see how your h**igher average selling pric**e by stretching for an additional seat lead to **20% more bookings** on the same number of wins? Pretty awesome, right?"

How To Systematize This

How to systematize <u>observation</u>?

*Have **time on the calendar** to ensure it actually happens. **Calendar is destiny.***

<u>Meeting</u>	<u>Frequency</u>	<u>Audience</u>	<u>Content</u>
Pipeline Review	Weekly	Individual or Team	Top to bottom inspection - close dates, amounts, stage, forecast cats.
Deal Strategy Meeting	Weekly	Individual	Review top deals that rep feels stuck on.
1:1 Meeting	Bi-weekly	Individual	Not a deal review. Reviews metrics and progress on coaching initiatives. HR Topics.
QBR Meeting	Quarterly	Individual	Review highlights and lowlights and outcomes of last quarter coaching intentions. Set new intentions.
Call Review	Monthly	Team	Review one or two calls. "Film session."

How to systematize observation?

*Have **time on the calendar** to ensure it actually happens. **Calendar is destiny.***

	Monday	Tuesday	Wednesday	Thursday	Friday
Week 1	Mid-day Standup	Mid-day Standup	Mid-day Standup	Mid-day Standup	Mid-day Standup
	Sales Team Meeting: Prior month retrospective, this month forward looking.		AE Team Pipeline Review.	One-on-ones with all team members.	
				Team Happy Hour	
Week 2	Mid-day Standup	Mid-day Standup	Mid-day Standup	Mid-day Standup	Mid-day Standup
	Sales Team Meeting: Getting into rhythm		AE Team Pipeline Review.		
Week 3	Mid-day Standup	Mid-day Standup	Mid-day Standup	Mid-day Standup	Mid-day Standup
	Sales Team Meeting: Approaching end of the month. Last chance for adjustments.		AE Team Pipeline Review.	One-on-ones with all team members.	
				Team Happy Hour	
Week 4	Mid-day Standup	Mid-day Standup	Mid-day Standup	Mid-day Standup	Mid-day Standup
	Sales Team Meeting: Last opportunity for getting deals / opp creation across the line.		AE Team Pipeline Review.	Team Happy Hour	

How to systematize <u>observation</u>?

*Have the **assets** in hand.*

What are reports / dashboards for?
- You should think about each report as answering a question. "How many opps have the SDRs created this month so far?" "How many opps does each AE own right now?" "How much pipeline is closing in the coming 90 days, by rep?" "How many emails did each SDR send last week?"
- Similarly, each dashboard should be thought of "This is used at this consumption point to do these things."

  E.g., "This dashboard is used in an AE 1:1 to review performance metrics during this time period." "This dashboard is used at noon every day to see how the SDRs are doing on their daily performance metrics." "This dashboard is used at the Monday morning sales team meeting to look at our performance last week, and progress this month." "This dashboard is used in our exec meeting to look at aggregate metrics."

Multiple Views Per Metric
- One view per metric is usually not enough (this is why report building can be a large effort if you want to be comprehensive) to properly monitor a metric.

  E.g., if a rep has been declining in new opps coming into the pipe, and you're only looking at "Total New Opps Per Rep, Trailing 90 Days", you won't notice this for a few weeks. Whereas if you have a week by week view, you'll visually see the decline.

- A good approach is pairing a Total w/ a Trend, and doing Per Rep along w/ Team Totals.

How to systematize observation?

*Have the **assets** in hand.*

CRM Reporting: Available now, flexible, but time consuming.

- Overview: In-CRM reporting and dashboarding is one of the most common ways that sales team instrument the performance of their reps and teams.

**Business Intelligence: Slow to set up, flexible and powerful, time consuming to monitor.**

- Overview: Horizontal Business intelligence is a powerful and flexible way to do reporting and visualization, and is typically viewed as more advanced. Popular examples are Tableau and Looker.

Data-Driven Sales Management Software: Quick setup, less flexible, automatically monitored.

- Overview: There is a category of performance-centric analysis software that is purpose built for instrumenting sales reps and teams. Atrium is an example of this software.
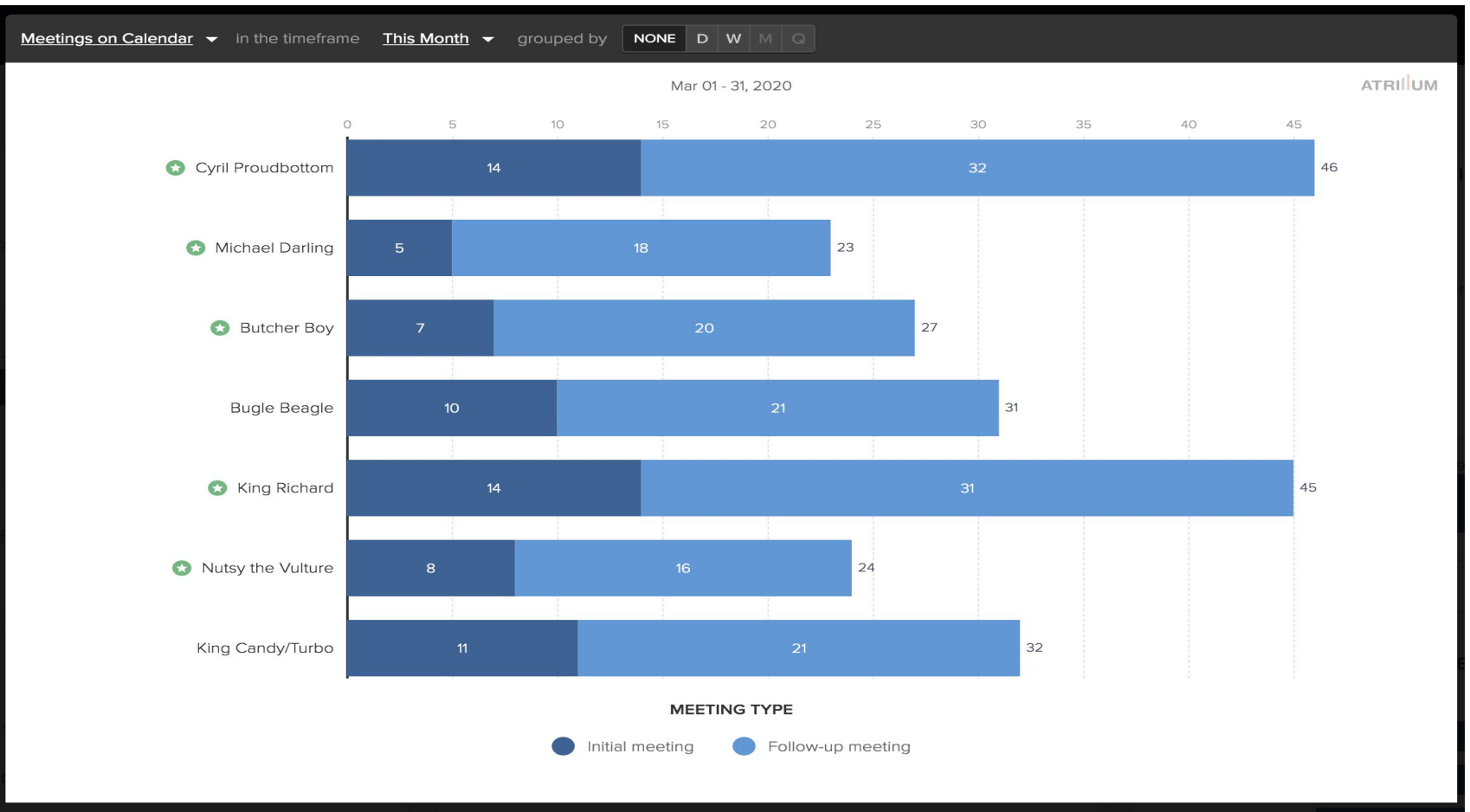
How to systematize <u>observation</u>?

*Have the **assets** in hand.*
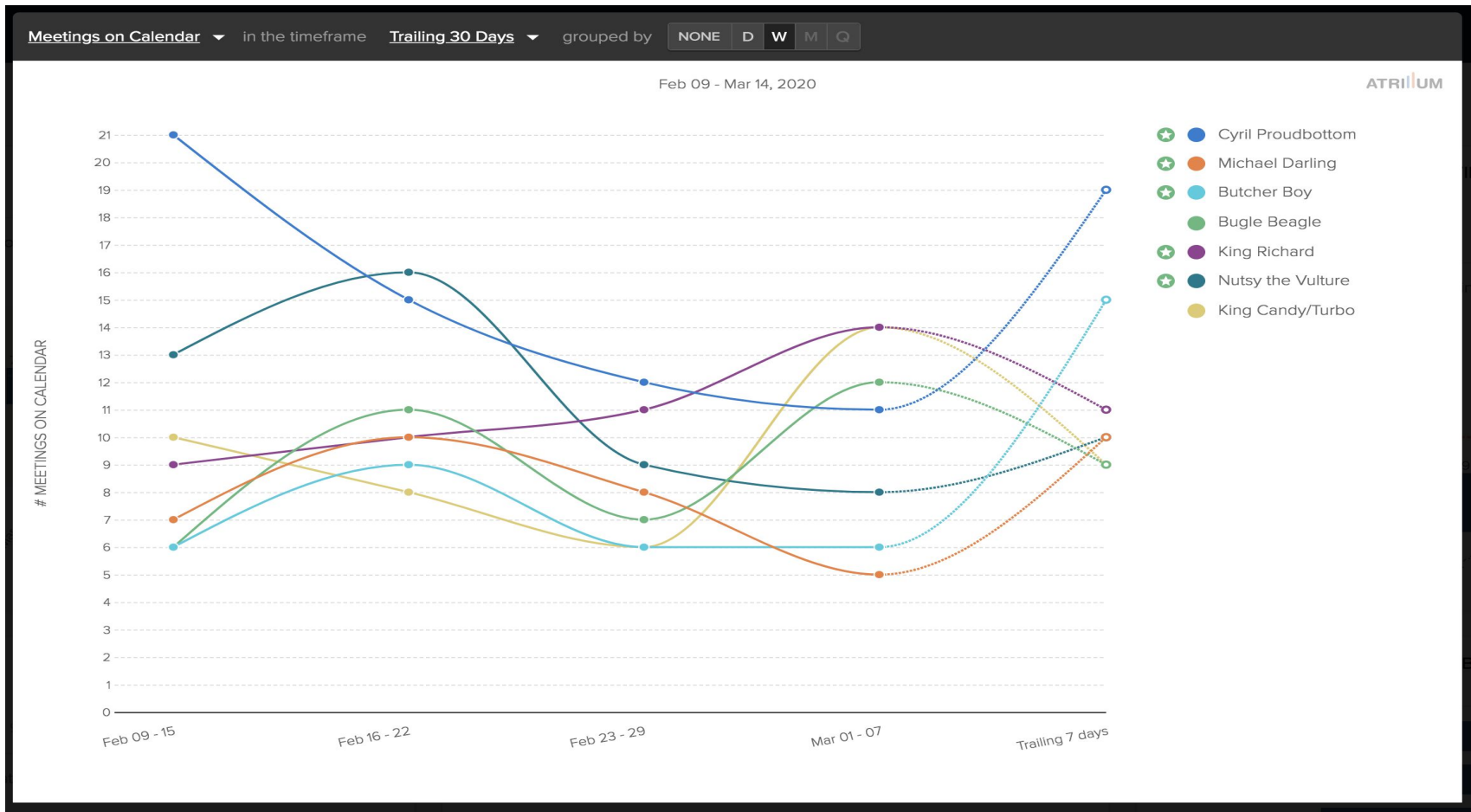
Customer Meetings by Rep, Trailing 30, By Week

Questions Answered:
"Are we seeing any trends in meeting volumes in our reps that would be a cause for concern and we should address?"
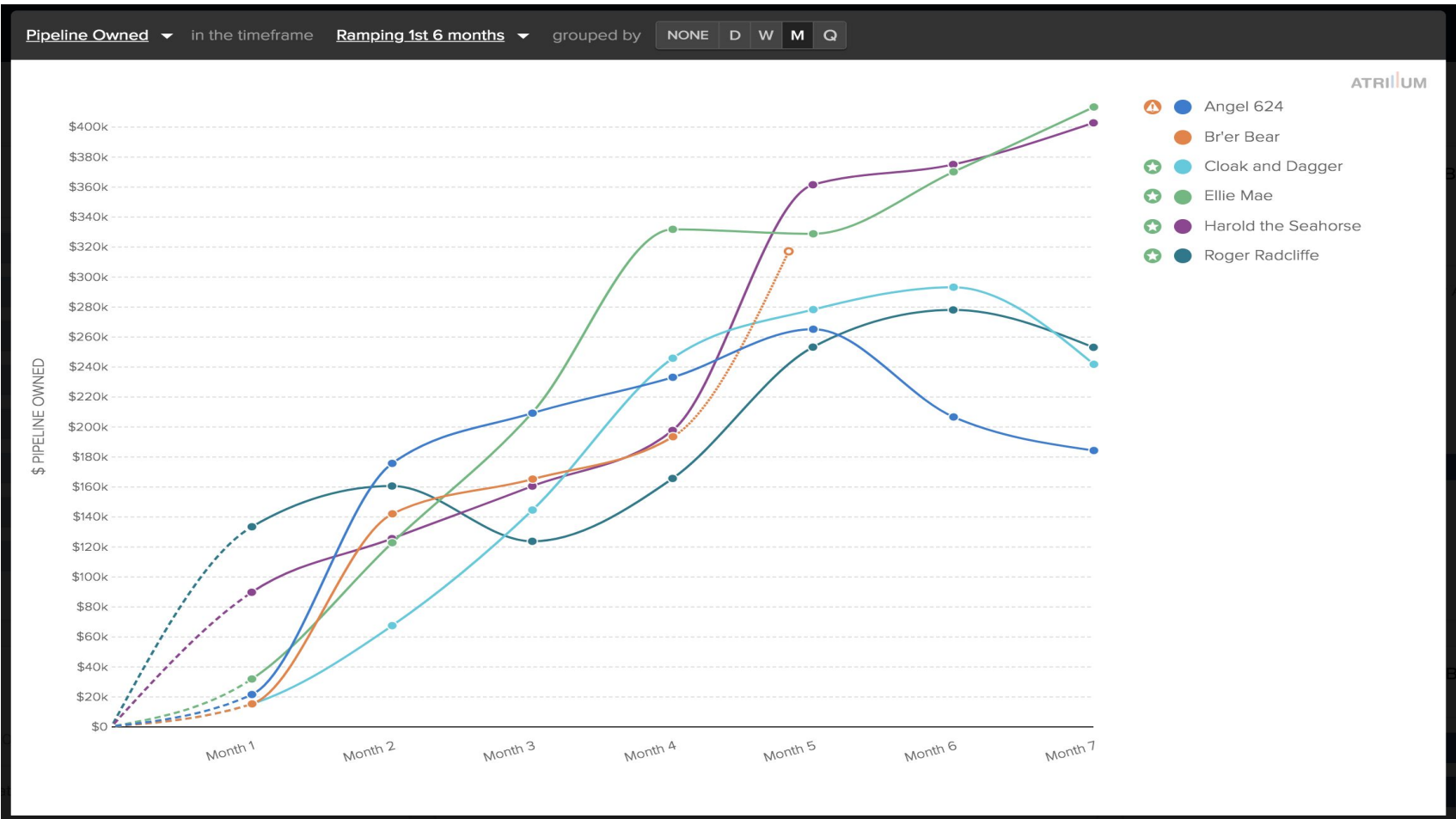
Customer Meetings by Rep, This Month, Totaled

Questions Answered:
"Is there any rep that appears to be lagging on customer facing meetings this month in a way that would cause concern and we should address?
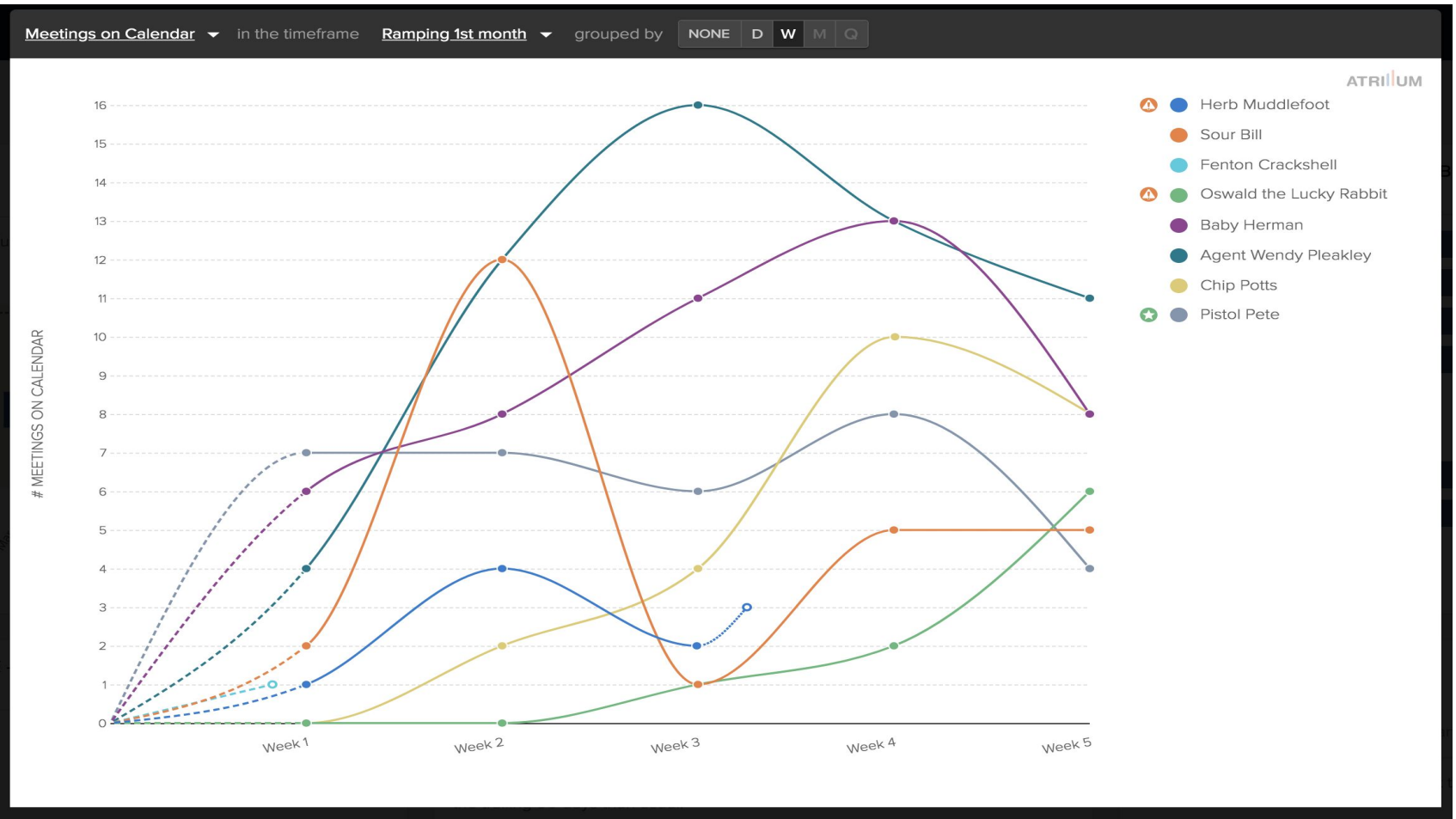
How to systematize observation?

*Have the **assets** in hand.*

Pipeline Owned by Rep, Ramping 6 Months, By Month

Questions Answered:
"Is there anyone early in their ramp who's not ramping into band?"

Customer Meetings, Ramping 30 Days, By Week

Questions Answered:
"Is there any rep that appears to be lagging on customer meetings in a way that will hurt their later ramp?"

How to systematize <u>observation</u>?

*Have the **assets** in hand.*

Dashboard Design for a given meeting

Metric	Time Period	Grouping	Metric	Time Period	Grouping
Bookings by Rep	Last Week	Totaled	Bookings by Rep	This Month	Totaled
Wins by Rep	Last Week	Totaled	Wins by Rep	This Month	Totaled
Meetings by Rep	Last Week	Totaled	Meetings by Rep	This Month	Totaled
Opps Advanced by Rep	Last Week	Totaled	Opps Advanced by Rep	This Month	Totaled
Opps Touched by Rep	Last Week	Totaled	Opps Touched by Rep	This Month	Totaled
New Opps by Rep	Last Week	Totaled	New Opps by Rep	This Month	Totaled
New Pipe by Rep	Last Week	Totaled	New Pipe by Rep	This Month	Totaled

Quick Commercial for Atrium
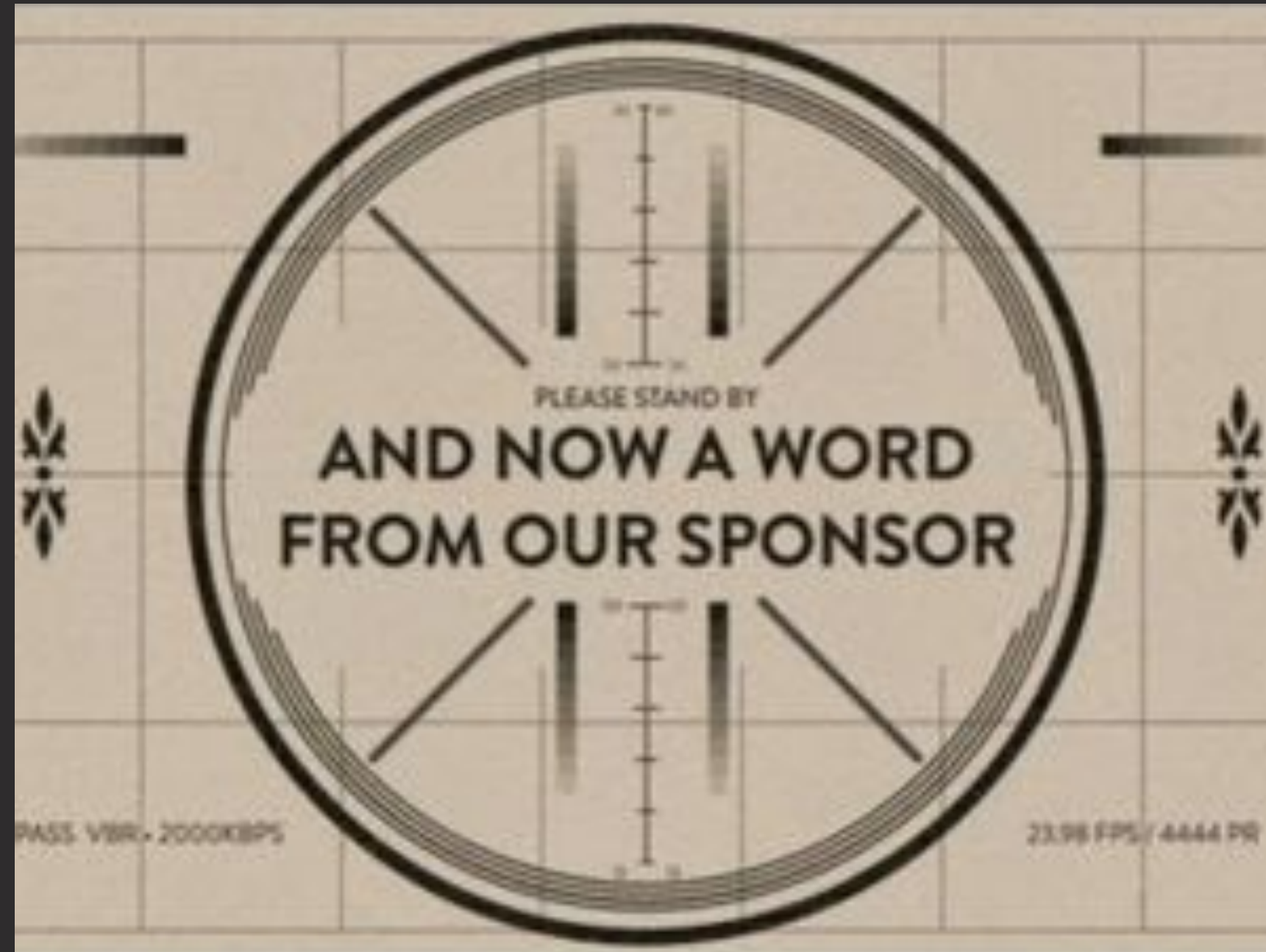
Everything managers need to be data-driven

Imagine a world where sales managers have:

All the KPIs for *reps* & *teams*

Proactive goal tracking

Early warning alerting

Performance issue diagnosis

In a solution that is easy to deploy and adopt:

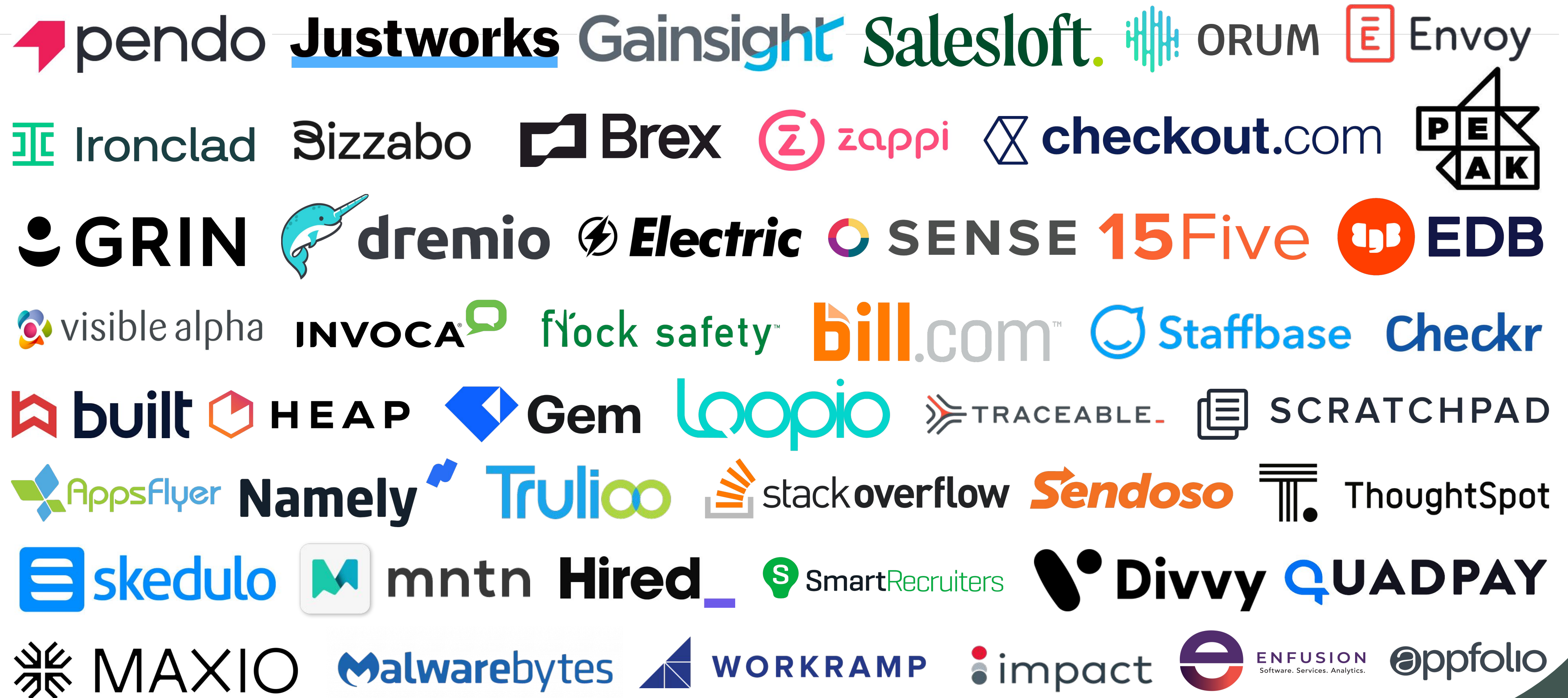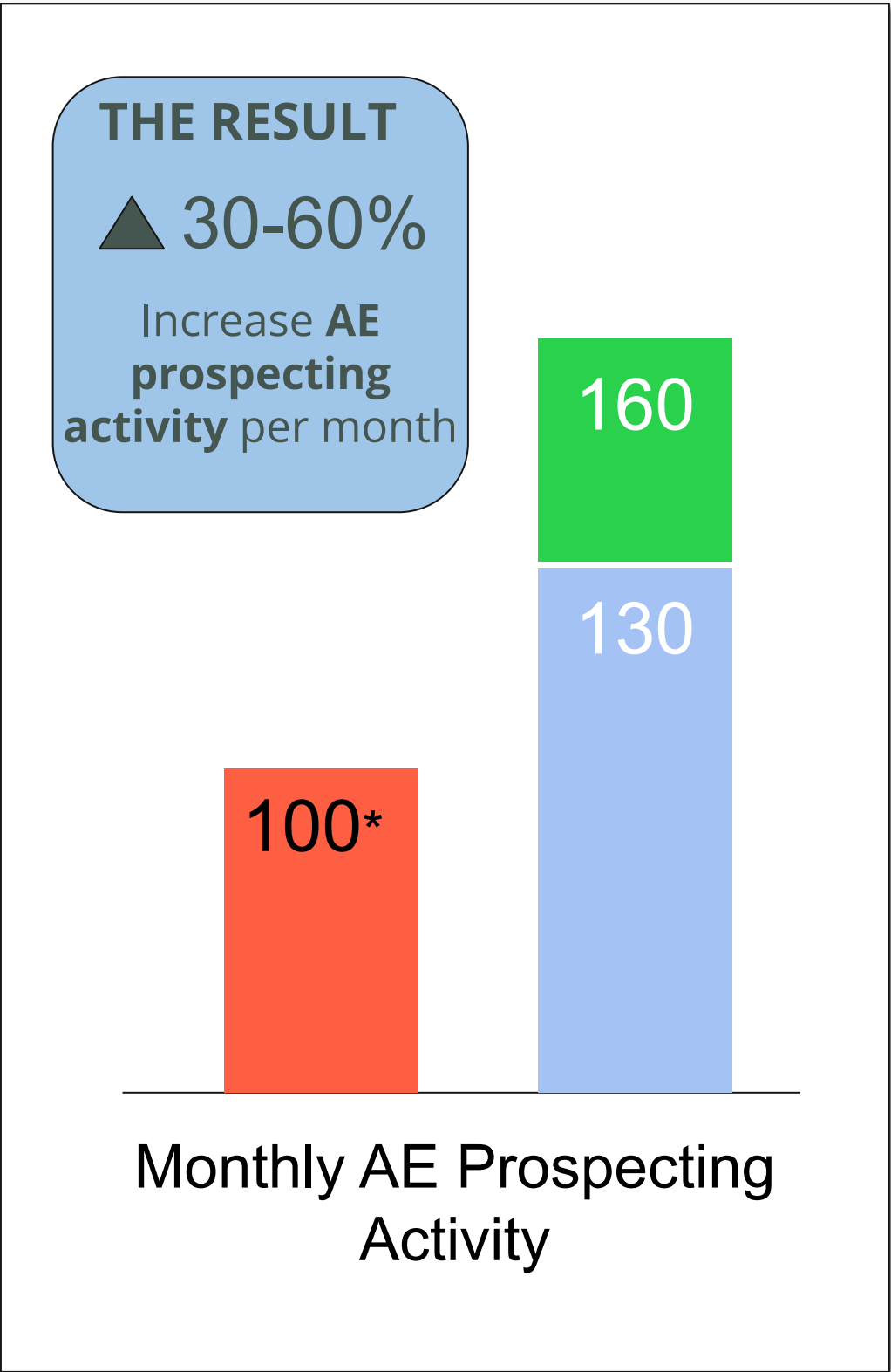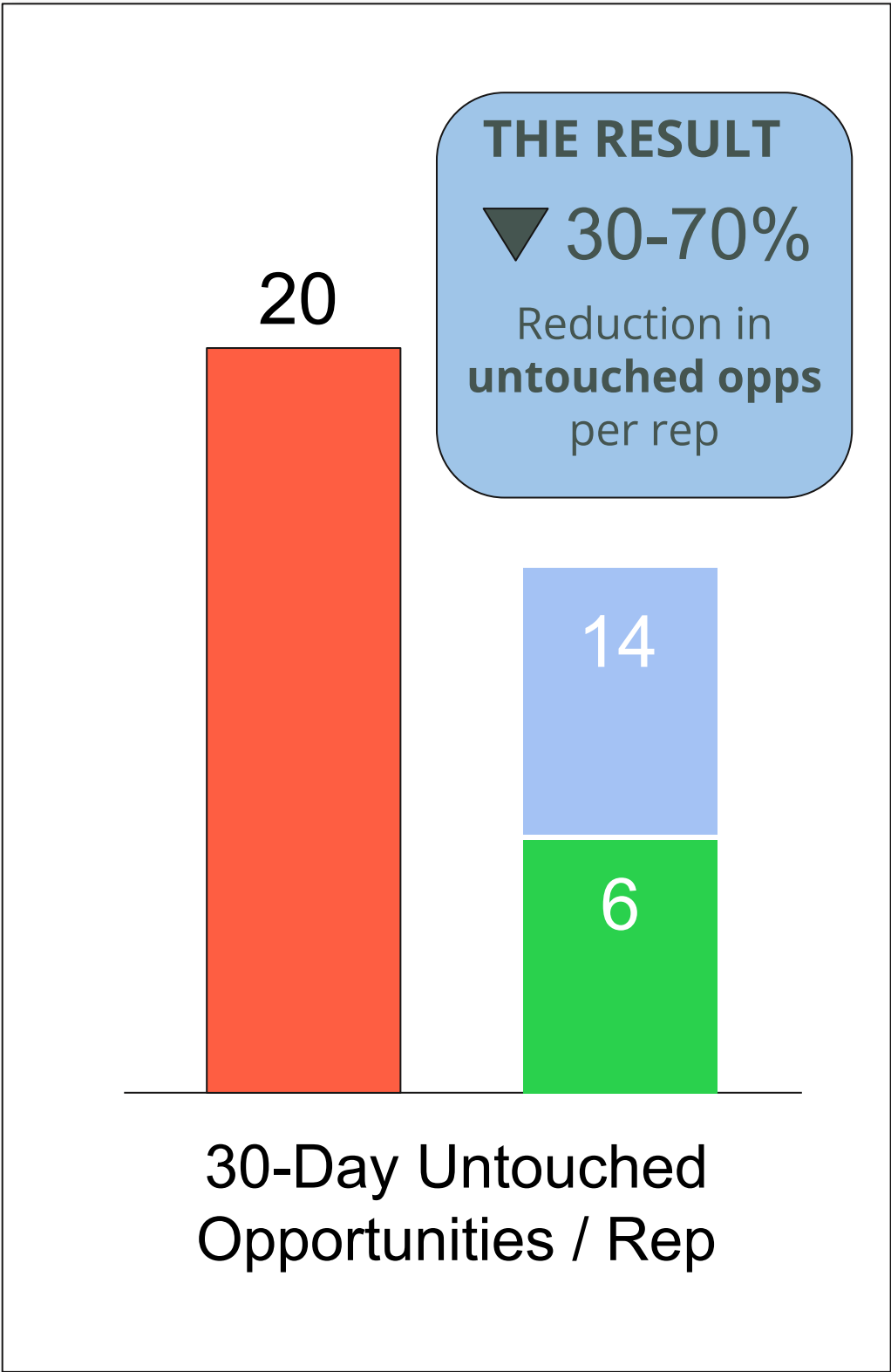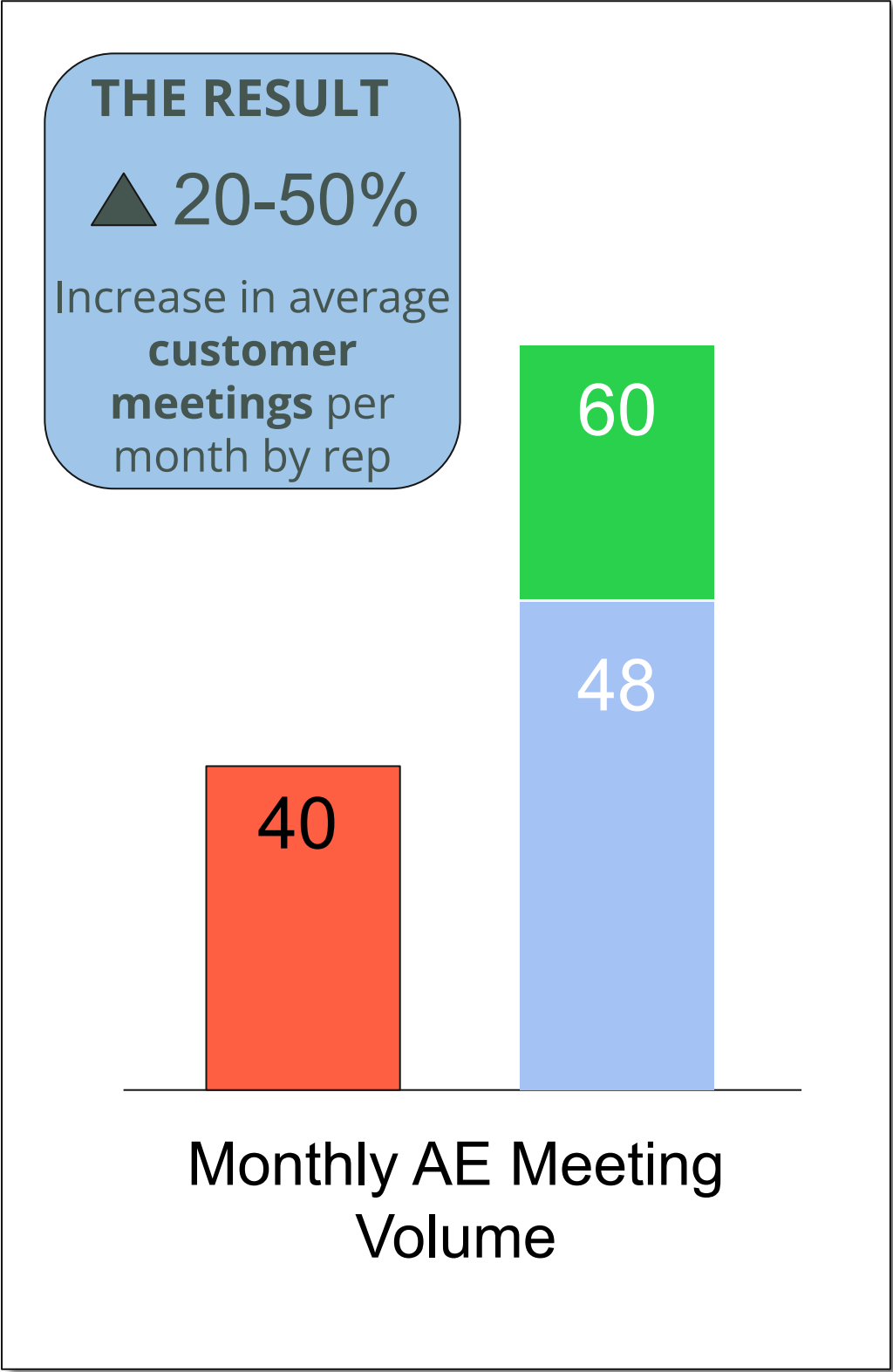Wildly easy for managers to use

Instant-on & automatic data synch

Woven into managerial operating rhythm

Atrium helps sales managers, leaders, and reps **use metrics** to **improve performance**.

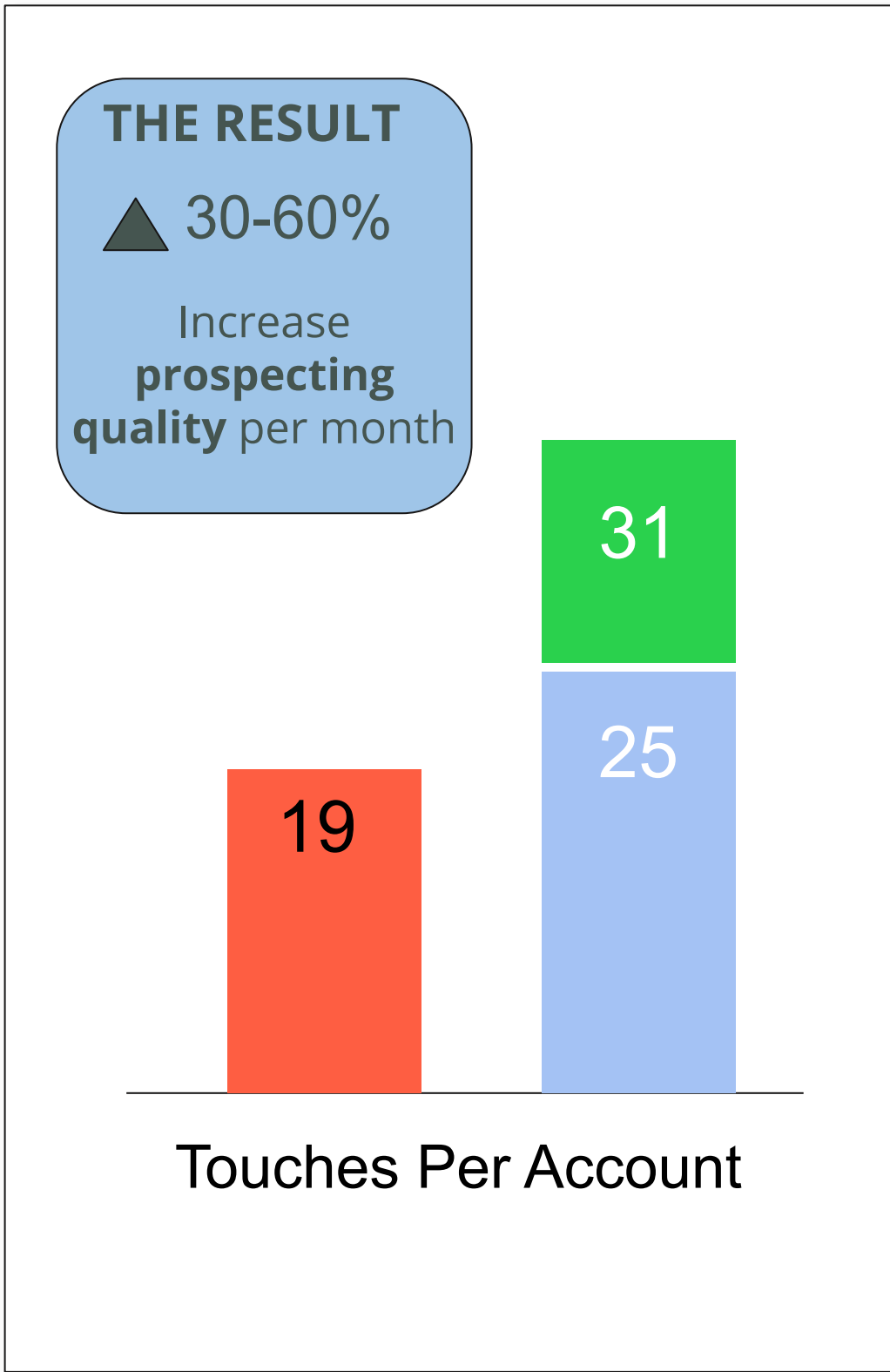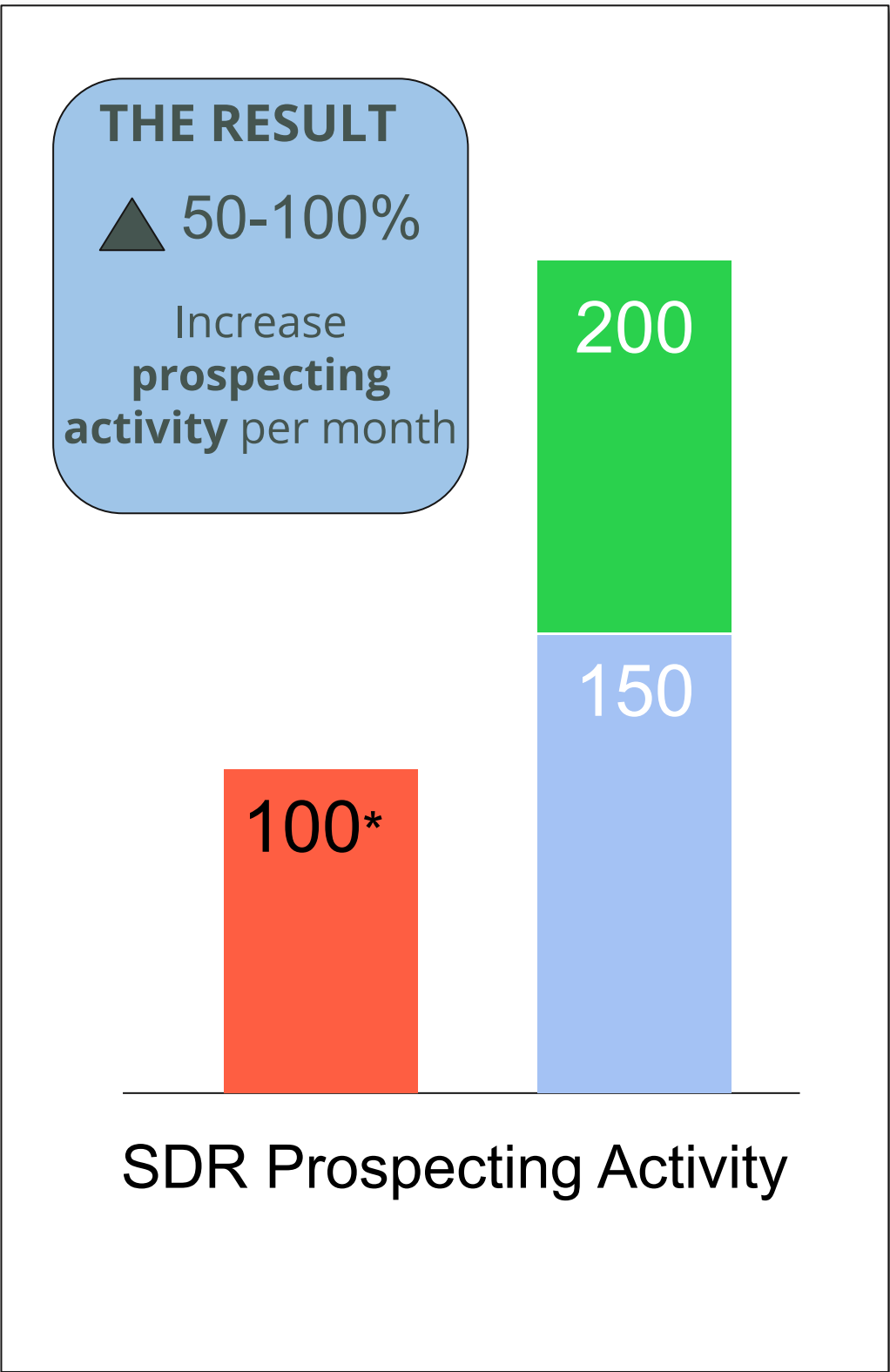# Scaled sales teams give their managers data-driven superpowers

pendo · Justworks · Gainsight · Salesloft. · ORUM · Envoy

Ironclad · Bizzabo · Brex · zappi · checkout.com · PEAK

GRIN · dremio · Electric · SENSE · 15Five · EDB

visible alpha · INVOCA · flock safety · bill.com · Staffbase · Checkr

built · HEAP · Gem · loopio · TRACEABLE. · SCRATCHPAD

AppsFlyer · Namely · Trulioo · stackoverflow · Sendoso · ThoughtSpot

skedulo · mntn · Hired_ · SmartRecruiters · Divvy · QUADPAY

MAXIO · Malwarebytes · WORKRAMP · impact · ENFUSION Software. Services. Analytics. · appfolio

Customers see between *30% - 70% improvements* in key AE metrics via enhanced management.

THE RESULT

▲ 20-50%

Increase in average **customer meetings** per month by rep

60

48

40

Monthly AE Meeting Volume

THE RESULT

▼ 30-70%

Reduction in **untouched opps** per rep

20

14

6

30-Day Untouched Opportunities / Rep

THE RESULT

▲ 30-60%

Increase **AE prospecting activity** per month

160

130

100*

Monthly AE Prospecting Activity

*"Baseline" pre-Atrium AE prospecting levels.

Customers see between *30% - 140% improvements* in key SDR metrics via enhanced management.

Pipeline Creation

THE RESULT

▲ 50-130%

Increase in **pipeline generated** per month per SDR

- 230
- 150
- 100*

SDR Prospecting Activity

THE RESULT

▲ 50-100%

Increase **prospecting activity** per month

- 200
- 150
- 100*

Touches Per Account

THE RESULT

▲ 30-60%

Increase **prospecting quality** per month

- 31
- 25
- 19
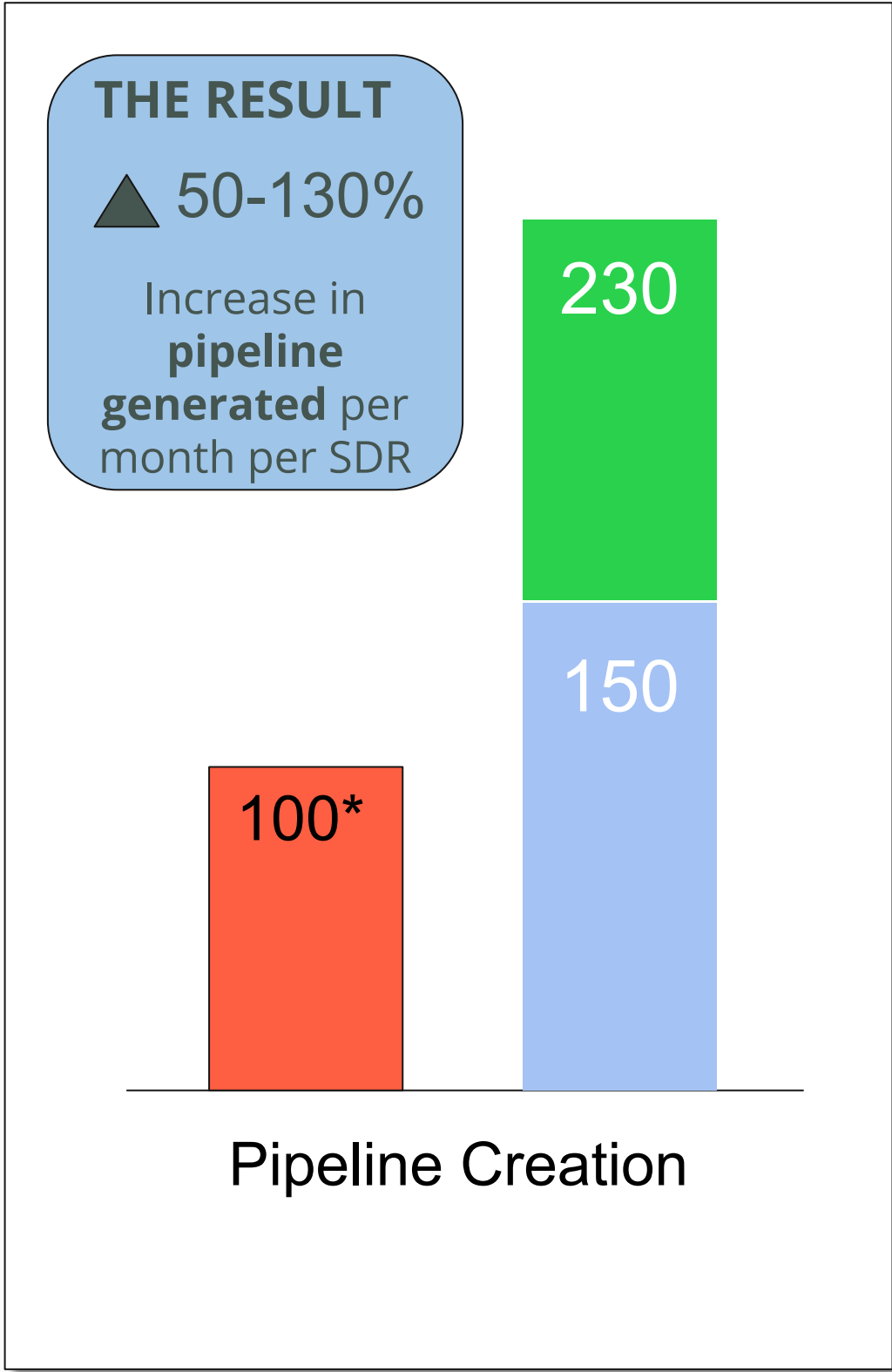
*"Baseline" pre-Atrium levels.

SCALE

Gainsight uses Atrium to *resurrect $3 million* in stuck opportunities
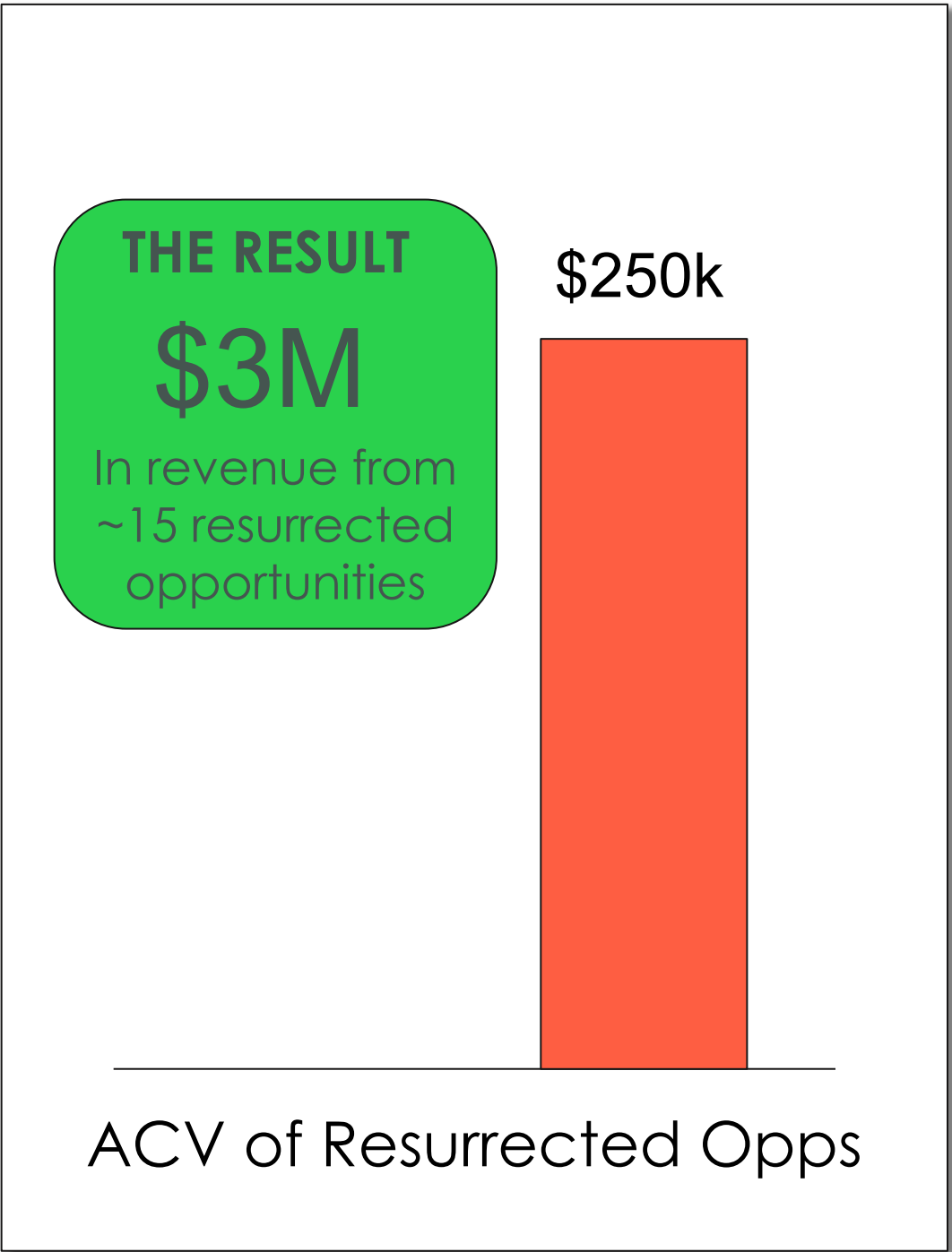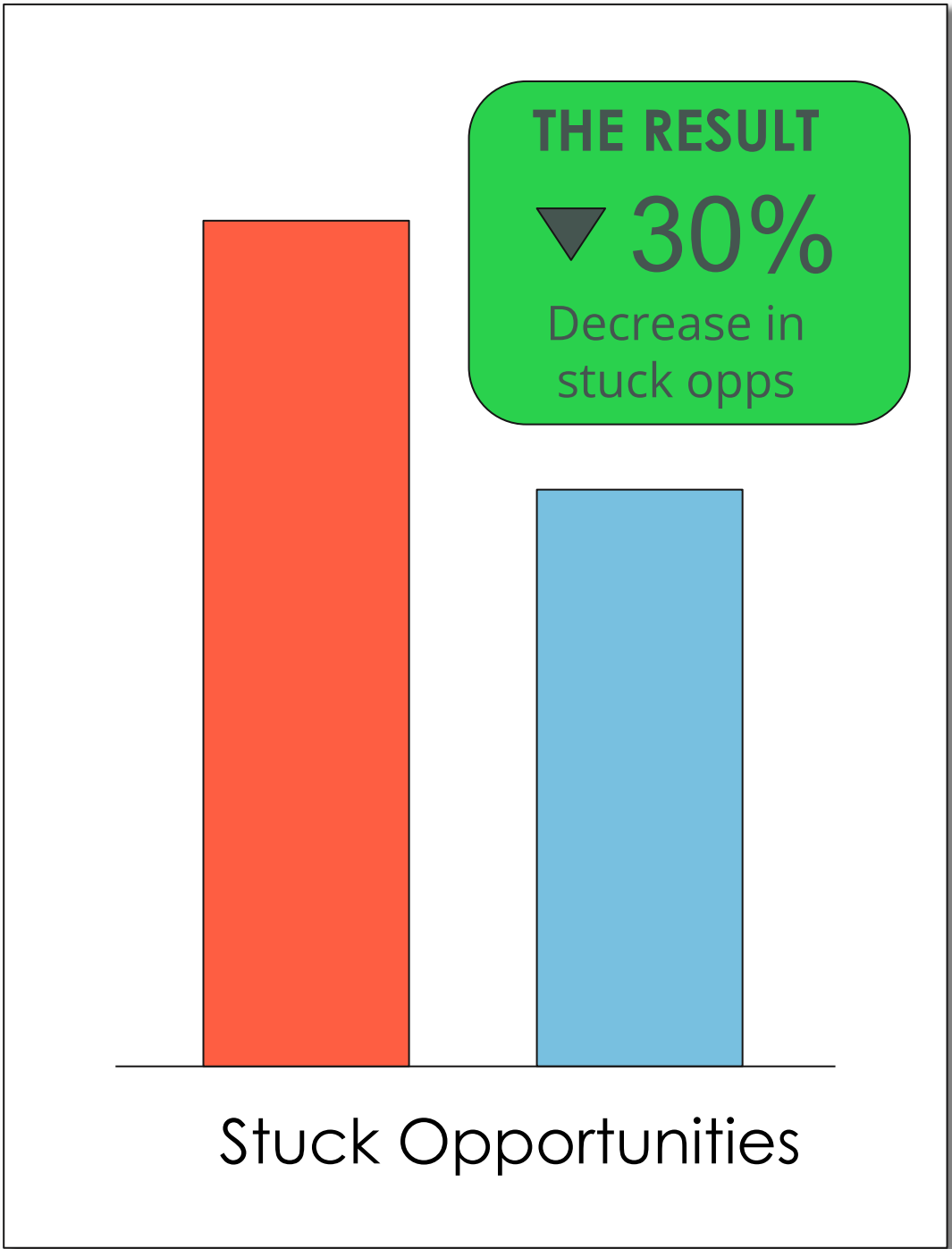
THE CHALLENGE

Jim's sales managers were spending so much time analyzing charts that they were missing gaps in their sales teams' performance.

THE SOLUTION

Atrium revealed said gaps, which included a lack of multi-threading, a bottleneck of stuck opps, and the opportunity to resurrect opportunities that had gone cold.

Jim Murphy
SVP, North American Enterprise Sales

THE RESULT
▼ 30%
Decrease in stuck opps

Stuck Opportunities

THE RESULT
$3M
In revenue from ~15 resurrected opportunities

$250k

ACV of Resurrected Opps

🔊 Hear what Jim has to say! 🔊

Envoy uses Atrium to 2x meeting volumes and reduce neglected opps by 40%
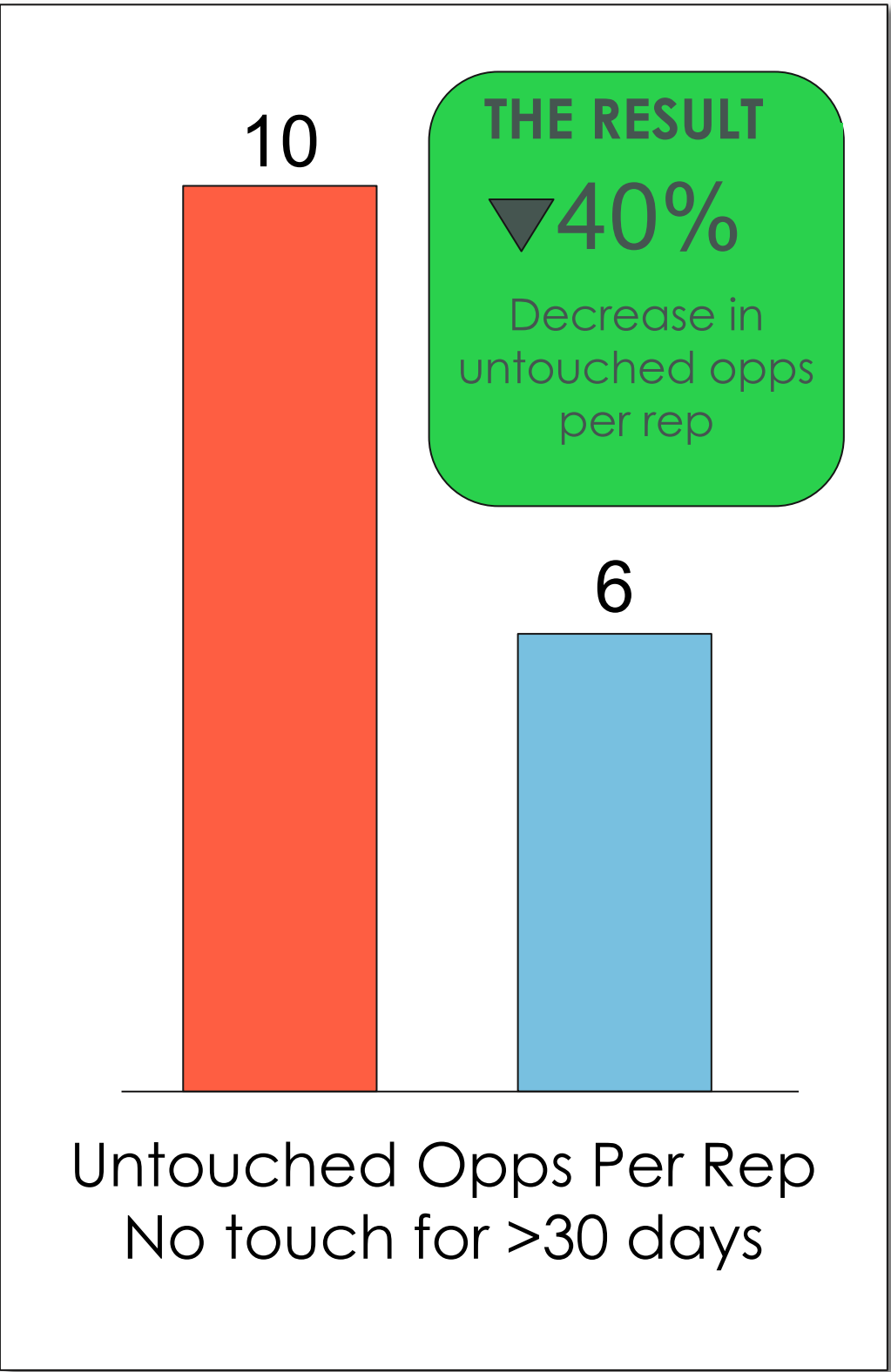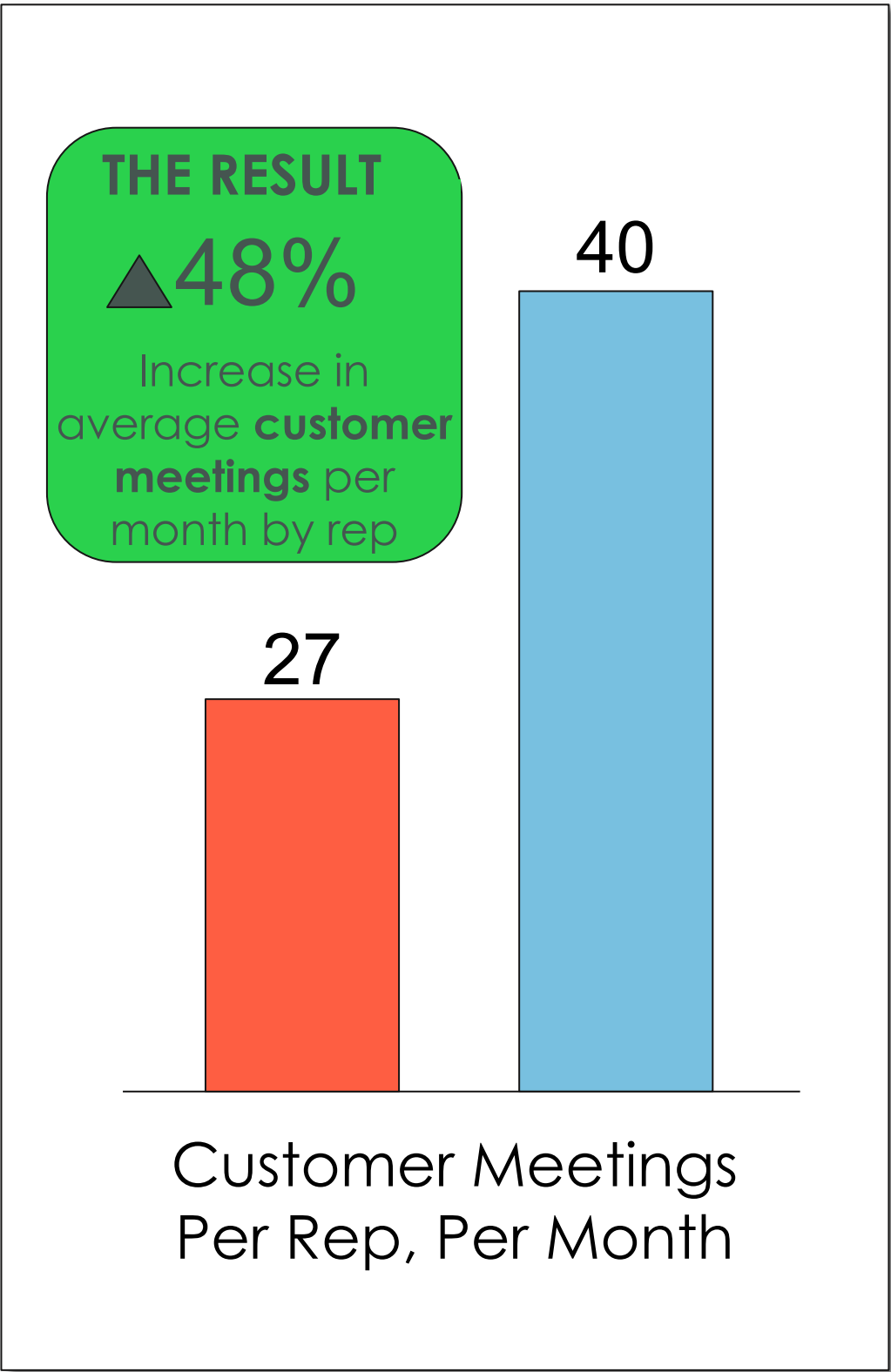
THE CHALLENGE

Envoy's two biggest quarterly goals were to increase AE selling activity while raising effectiveness of pipeline management in light of scarcer opportunity generation.

THE SOLUTION

Envoy deployed Atrium views tracking key metrics to use in weekly meetings with his managers and sent out to his team via Slack and email. Justin ensured that his managers were also using them in their team meetings and 1:1s to help coach reps in getting next meetings scheduled and touching their opps.

Justin Bullock
VP of Sales

Envoy

THE RESULT
▲48%
Increase in average **customer meetings** per month by rep

40

27

Customer Meetings
Per Rep, Per Month

10

THE RESULT
▼40%
Decrease in untouched opps per rep

6

Untouched Opps Per Rep
No touch for >30 days

# Workramp uses Atrium to *improve AE pipeline hygiene by 50%*

THE CHALLENGE

Prior to using Atrium, 51% of Chris' team's opportunities did not have a next meeting on calendar. His team struggled with pipeline hygiene and their 1:1s were not as effective as they could have been in addressing these issues.

THE SOLUTION

Opp health views in Atrium exposed to Chris how much of his team's open pipeline had no next step. *He used those views in his 1:1s* and team meetings to show his reps where they need to focus in order to get those next meetings scheduled, and then *used Atrium to track their progress going forward*.

As a result, now only 25% of the team's opportunities have no next step, a nearly *50% improvement in less than 1 month.*

THE RESULT

▼ **50%**

Decrease in open opps with no next step

51%

25%

Opps With No Next Meeting
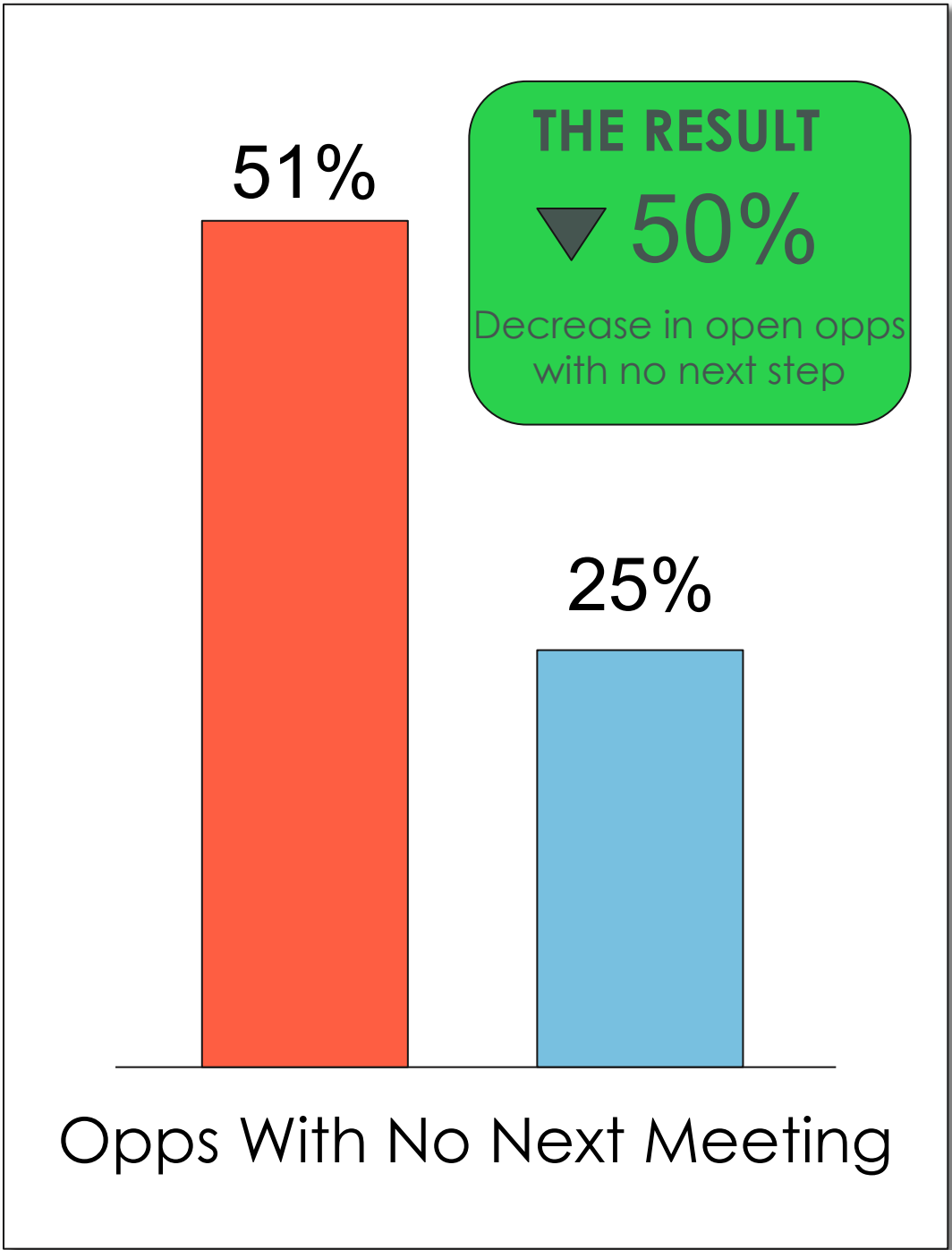
Chris Hartig
Director Of Commercial Sales

WORKRAMP

HEAR FROM CHRIS

"I can't tell you how much more effective my 1:1s have been because of Atrium."

Now back to our regularly scheduled programming...

How to systematize orientation & decision?

*Get good at **reading** the data.*

So you've gone through all the effort of selecting metrics, setting goals, building visualizations, and cadencing their consumption - the last step is to sniff out issues, and then work to remediate them!

DETECT

Look for potential issues
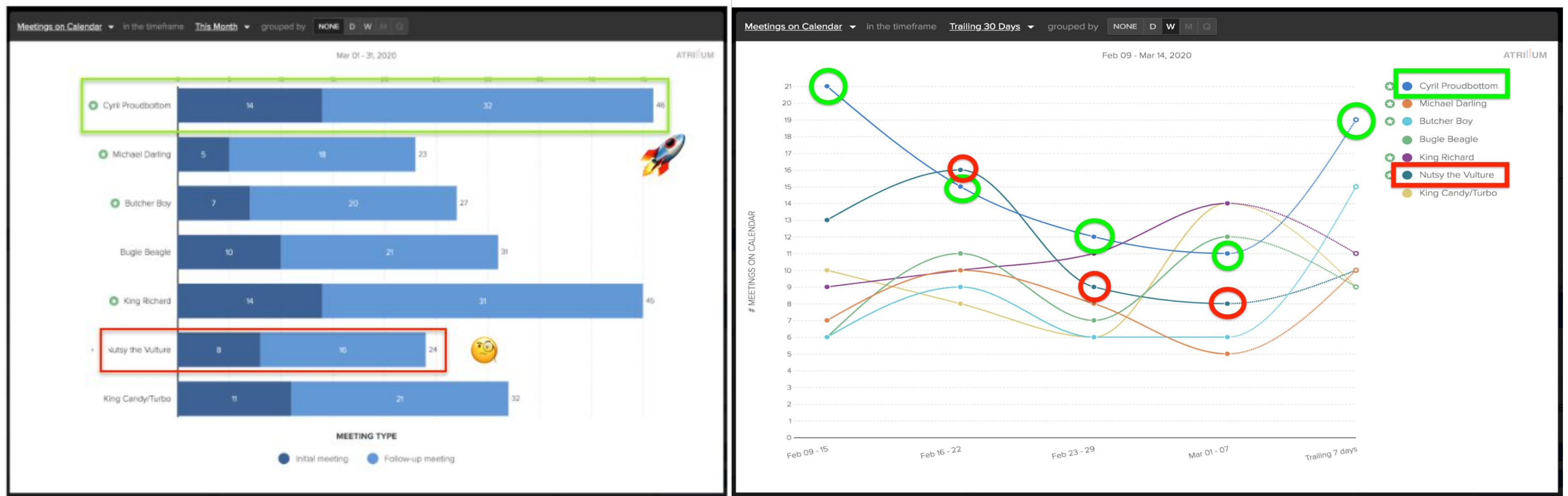
DIAGNOSE

Determine root cause(s)

COMMUNICATE

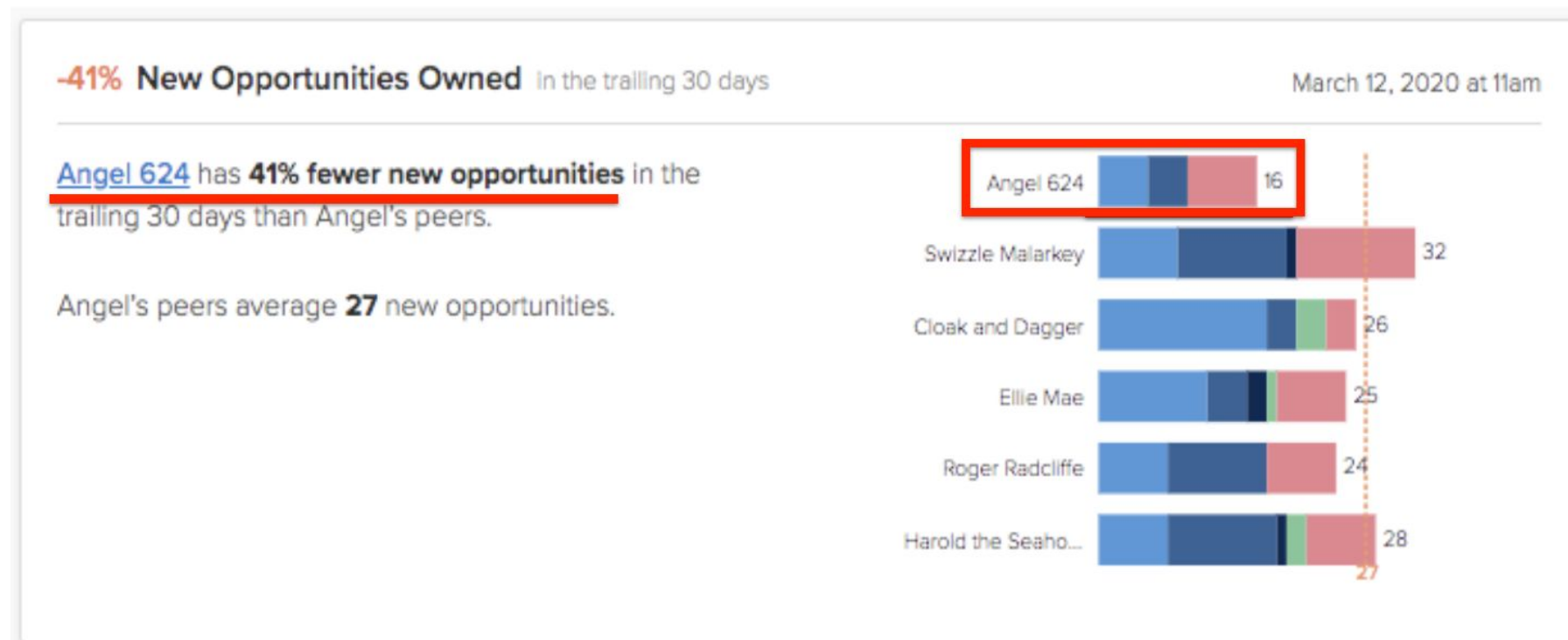*Discuss and agree on resolution steps*

How to systematize **orientation & decision?**

*Get good at **reading** the data.*

Look at issues and bright spots in totals and trends.

How to systematize *orientation & decision?*
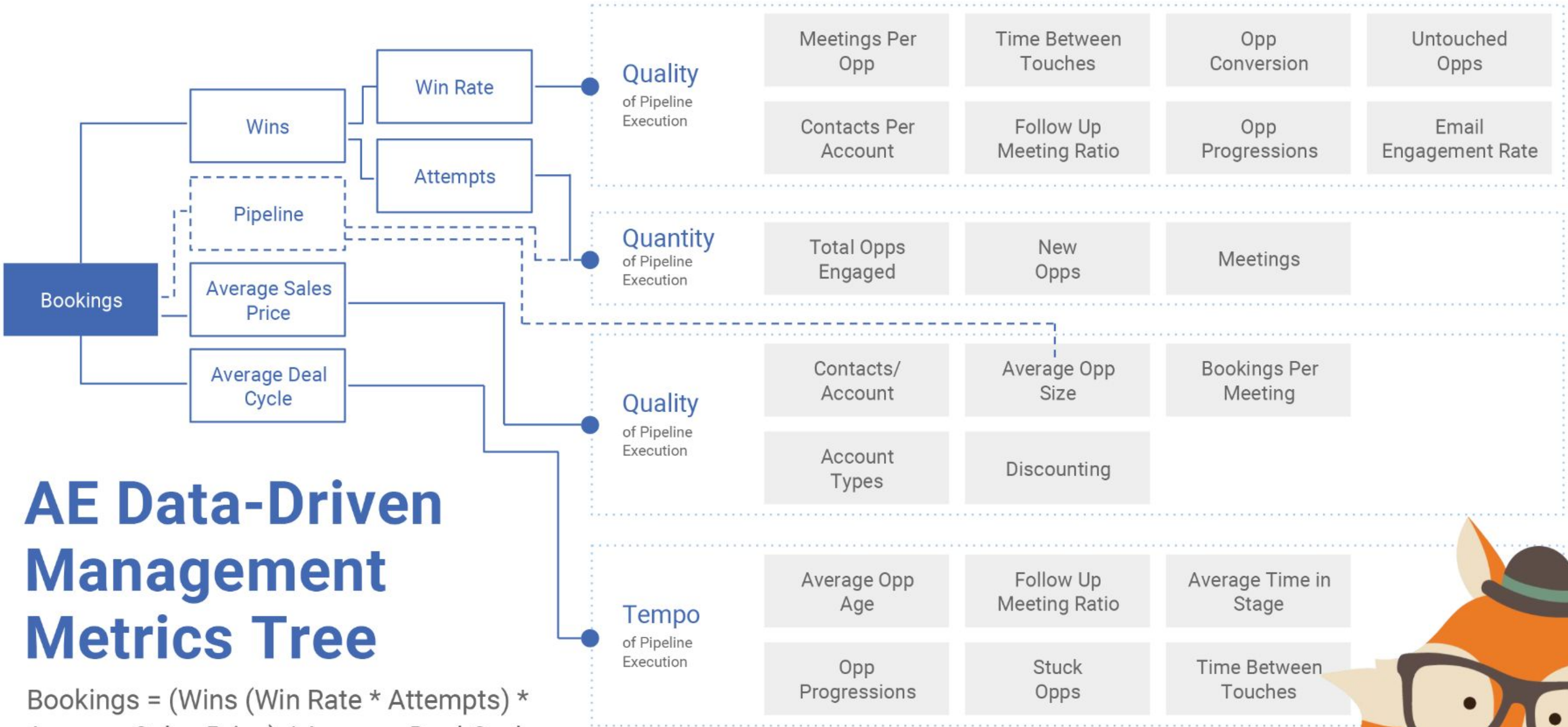
*Get good at **reading** the data.*

*If you can **monitor these movements statistically**, that can take some eyeball time off your plate.*

# If you're looking for the root cause of an issue "go right".

AE Revenue Formula

Drivers

ATRIUM

Win Rate → Wins → Quality of Pipeline Execution

Quality of Pipeline Execution			
Meetings Per Opp	Time Between Touches	Opp Conversion	Untouched Opps
Contacts Per Account	Follow Up Meeting Ratio	Opp Progressions	Email Engagement Rate

Quantity of Pipeline Execution		
Total Opps Engaged	New Opps	Meetings

Quality of Pipeline Execution		
Contacts/ Account	Average Opp Size	Bookings Per Meeting
Account Types	Discounting	

Tempo of Pipeline Execution		
Average Opp Age	Follow Up Meeting Ratio	Average Time in Stage
Opp Progressions	Stuck Opps	Time Between Touches

Bookings — Wins — Attempts — Pipeline — Average Sales Price — Average Deal Cycle

AE Data-Driven Management Metrics Tree

Bookings = (Wins (Win Rate * Attempts) * Average Sales Price) / Average Deal Cycle

http://www.atriumhq.com

If you're looking for the root cause of an issue "go right".
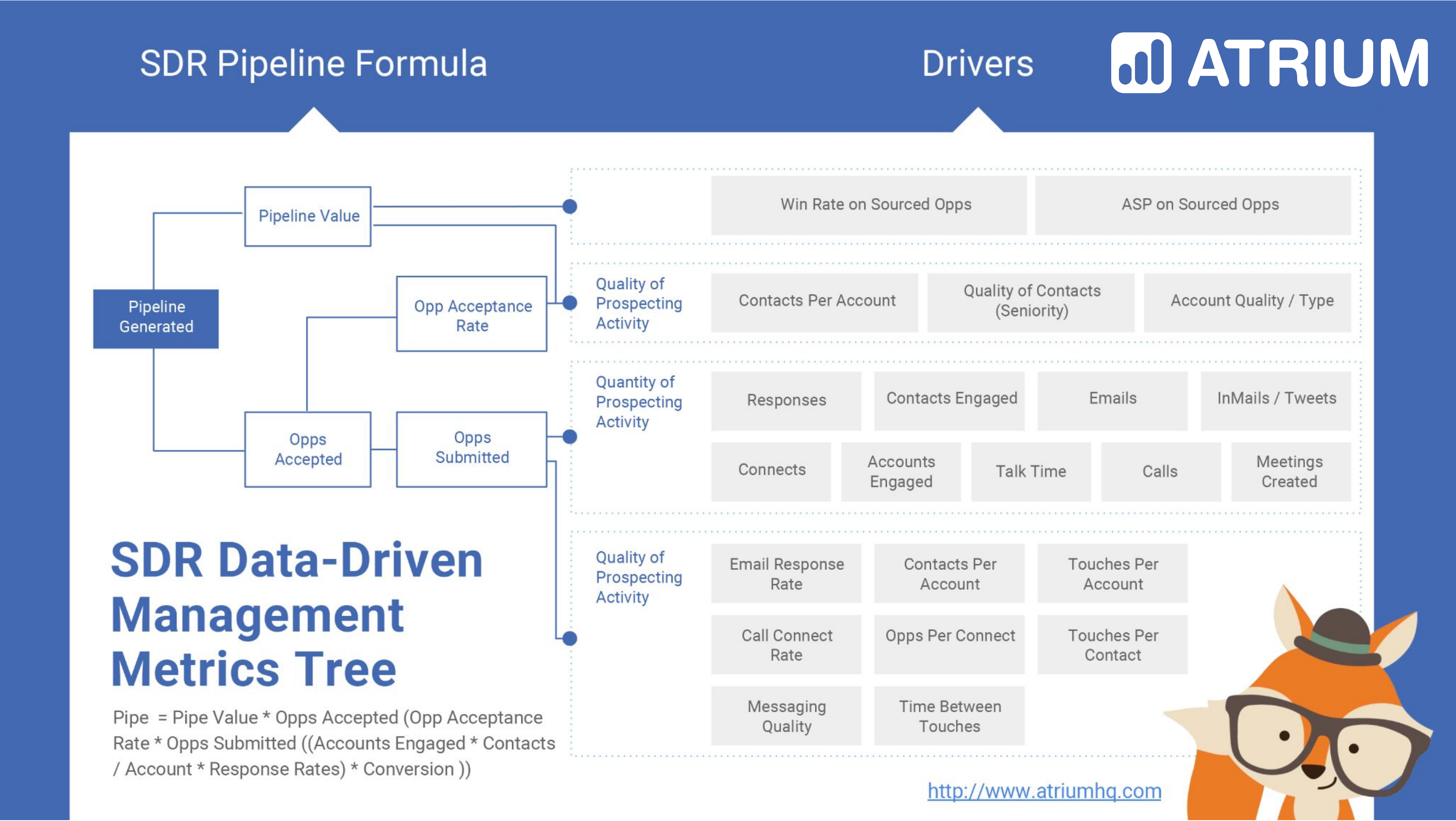
How do we systematize looping back?

Make a plan. Stick to it. Audit it.

Data-driven Sales Management: www.atriumqh.com

ATRIUM

1:1 Working Doc - REP_NAME

This document is used as a shared resource for recording 1:1 topics, ongoing coaching needs, etc.

Atrium screenshots and hyperlinks should be tied to every observation.

MM.DD.YY - TEMPLATE_TO_COPY	1
09.21.21 (Filled Out Example)	2

MM.DD.YY - TEMPLATE_TO_COPY
- Rep Topics
  - TBD
  - TBD
  - TBD
- Manager Topics
  - TBD
  - TBD
  - TBD
- Current Coaching Area of Emphasis
  - TBD
  - TBD
  - TBD
- Next Actions
  - TBD
  - TBD
  - TBD

Data-driven Sales Management: www.atriumqh.com

09.21.21 (Filled Out Example)
- Rep Topics
  - Opp Round Robin
- Manager Topics
  - Prospecting Activity
  - Open Enrollment
- Current Coaching Area of Emphasis
  - Pipe Hygiene
    - Untouched Opp Counts
- Next Actions
  - Calendaring two 1-hour blocks per week for pipe management, using this report.
  - BCC Pete on outbound touches.

[1:1 Coaching Meeting Template](#)

How do we systematize looping back?

Make a plan. Stick to it. Audit it.

Data-driven Sales Management: www.atriumqh.com

ATRIUM

QQ-YY QBR - REP_NAME

This document is used as a shared resource for recording highlights, lowlights, and to resolve areas of improvement for the coming quarter.

Atrium screenshots and hyperlinks should be tied to every observation. Use AE Team QBR Dashboard as primary investigation mechanism.

Highlights:
- TBD
- TBD
- TBD

Lowlights:
- TBD
- TBD
- TBD

Plan for coming quarter:
- TBD
- TBD
- TBD

ATRIUM

Q2-21 QBR - Rep 1

This document is used as a shared resource for recording highlights, lowlights, and to resolve areas of improvement for the coming quarter.

Atrium screenshots and hyperlinks should be tied to every observation. Use AE Team QBR Dashboard as primary investigation mechanism.

Highlights:
- You're a beast.
- Best quarter ever - didn't get help from ███ ██ - etc. did it on your own.
- Huge quality improvements from buckling down and improving on key behaviors.
- Data light volume is crazy - Marshawn approves.
- Win rate way up. Even in Tier 3.
- Getting out of manager reviews. Sending proposals. Winning from proposal.

Lowlights:
- Had some deal behavior deterioration (Hot pocket deficits).
- Last minute slips ███ from relying on others.
- Some items were too calorically intensive. "I'll do another meeting!" - Check out 2nd and 3rd meetings vs. first meetings and Follow Up Meeting Ratio

Plan for coming quarter:
- Faster sales cycle. Push to close.
- Don't get pushed around.
- Call people. Spear new contact calendars. Marshawn goes down funnel.
- Close.
- Continue to be a stud.

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Q2 2021 QBR - Rep 2

This document is used as a shared resource for recording highlights, lowlights, and to resolve areas of improvement for the coming quarter.

Atrium screenshots and hyperlinks should be tied to every observation. Use AE Team QBR Dashboard as primary investigation mechanism.

Highlights:
- Continue to kick ass! Even with the July lag.
- Fantastic expansion work.
- Fantastic pipeline win rate.
- Fantastic deal cycle.
- Pipe hygiene got *somewhat* better. (Still room to improve)

Lowlights:
- Vacations during end of quarter kill momentum.
- Meeting pending conversions?
- Down funnel conversion dip. Win Rate from Manager Reviews. Win Rate from Proposal.
- Win rate from Data Live deteriorated - lowest on team, decline from before. Let's discuss this.
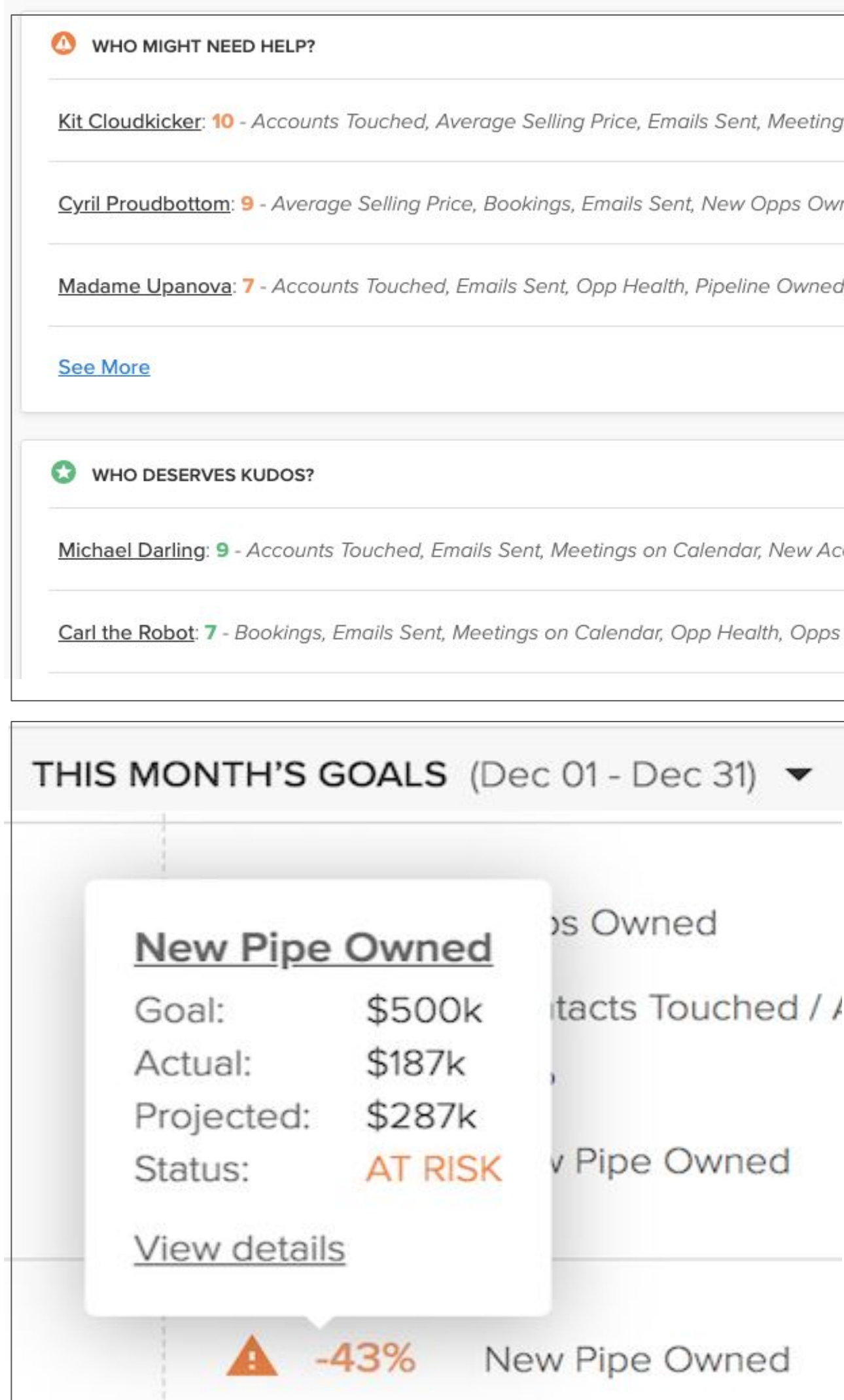
Plan for coming quarter:
- Consistency - don't spike high, don't crash low.
- Let's get things out of Meeting Pending / Manager Reviews (either hygiene, or action)
- Let's start working on some bigger opps.
- Can we do an $██k quarter?
- Let's get our Data Driven Sales Management talk tracks up!
- Let's not let ourselves get overloaded!

QBR Template

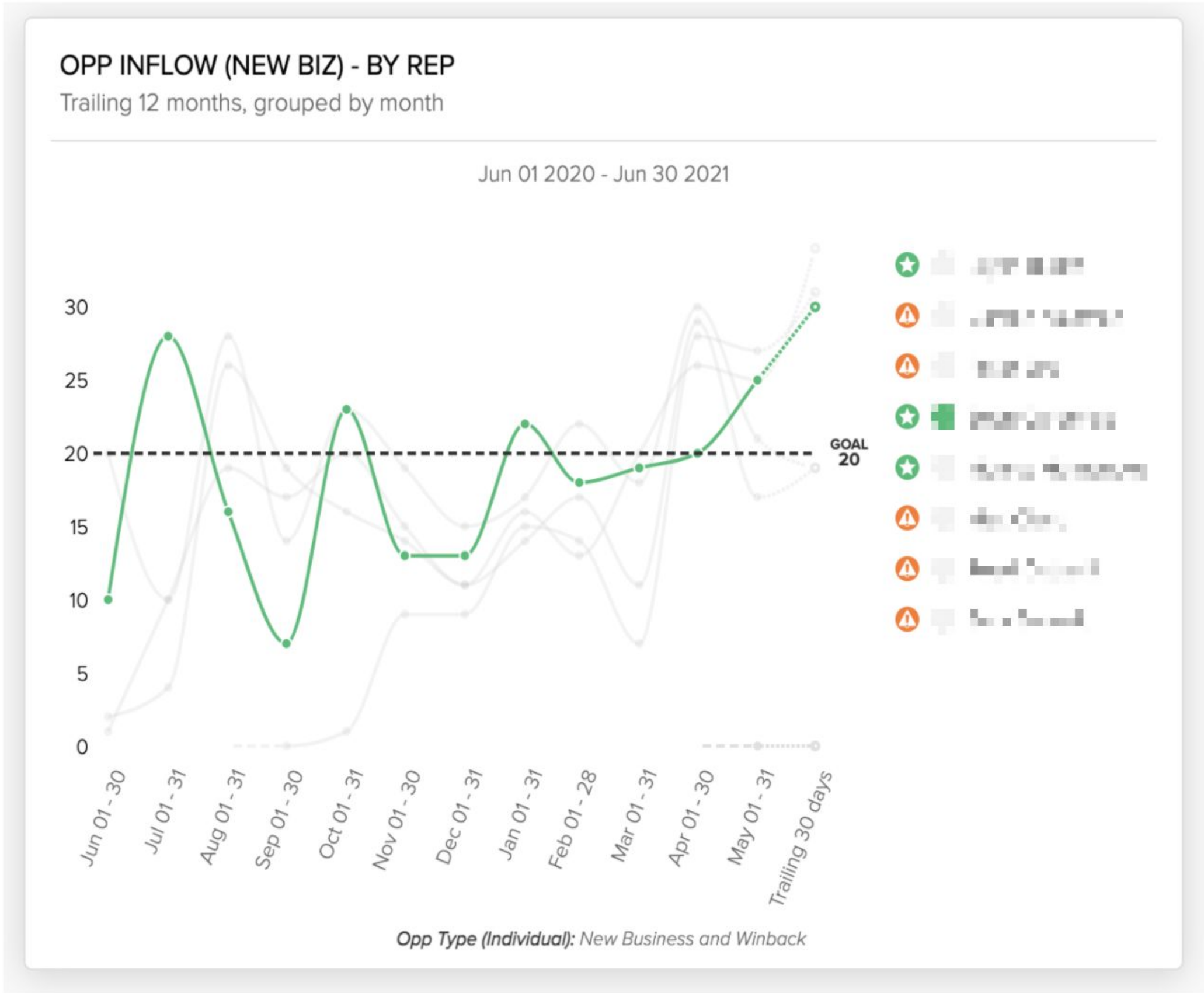# Data-Driven Sales Coaching In Action

DATA-DRIVEN SALES COACHING IN ACTION EXAMPLE 1

Context: Rep was on track for a miss for the month.

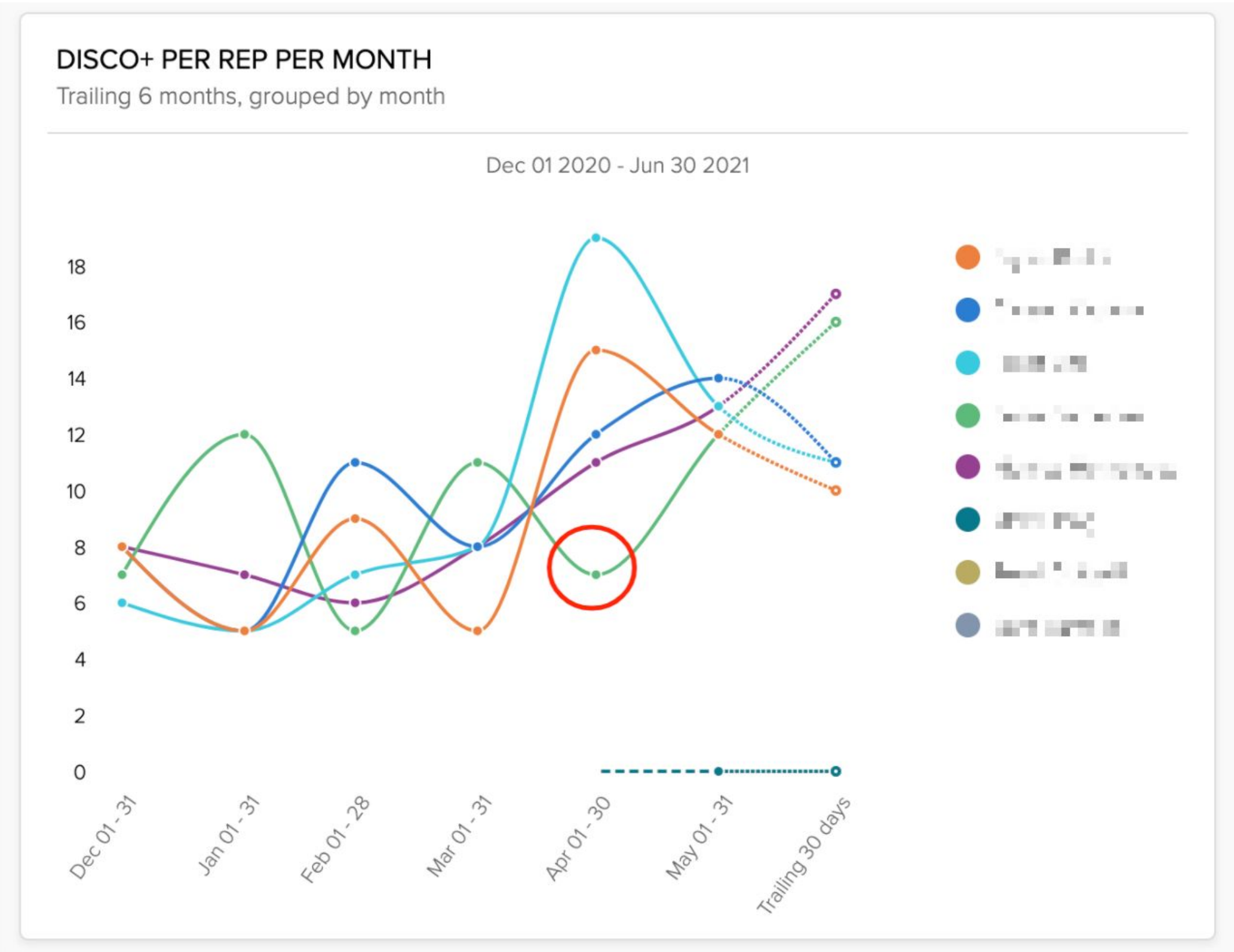# Data-Driven Sales Coaching in Action: Example 1

Could opp inflow be the issue?

No!

OPP INFLOW (NEW BIZ) - BY REP
Trailing 12 months, grouped by month

Jun 01 2020 - Jun 30 2021

Opp Type (Individual): New Business and Winback

Data-Driven Sales Coaching in Action: Example 1

We found that opps weren't progressing beyond discovery stage!

DATA-DRIVEN SALES COACHING IN ACTION EXAMPLE 2

Context: Rep was having issues with moving opps throughout the funnel

Data-Driven Sales Coaching in Action: Example 2

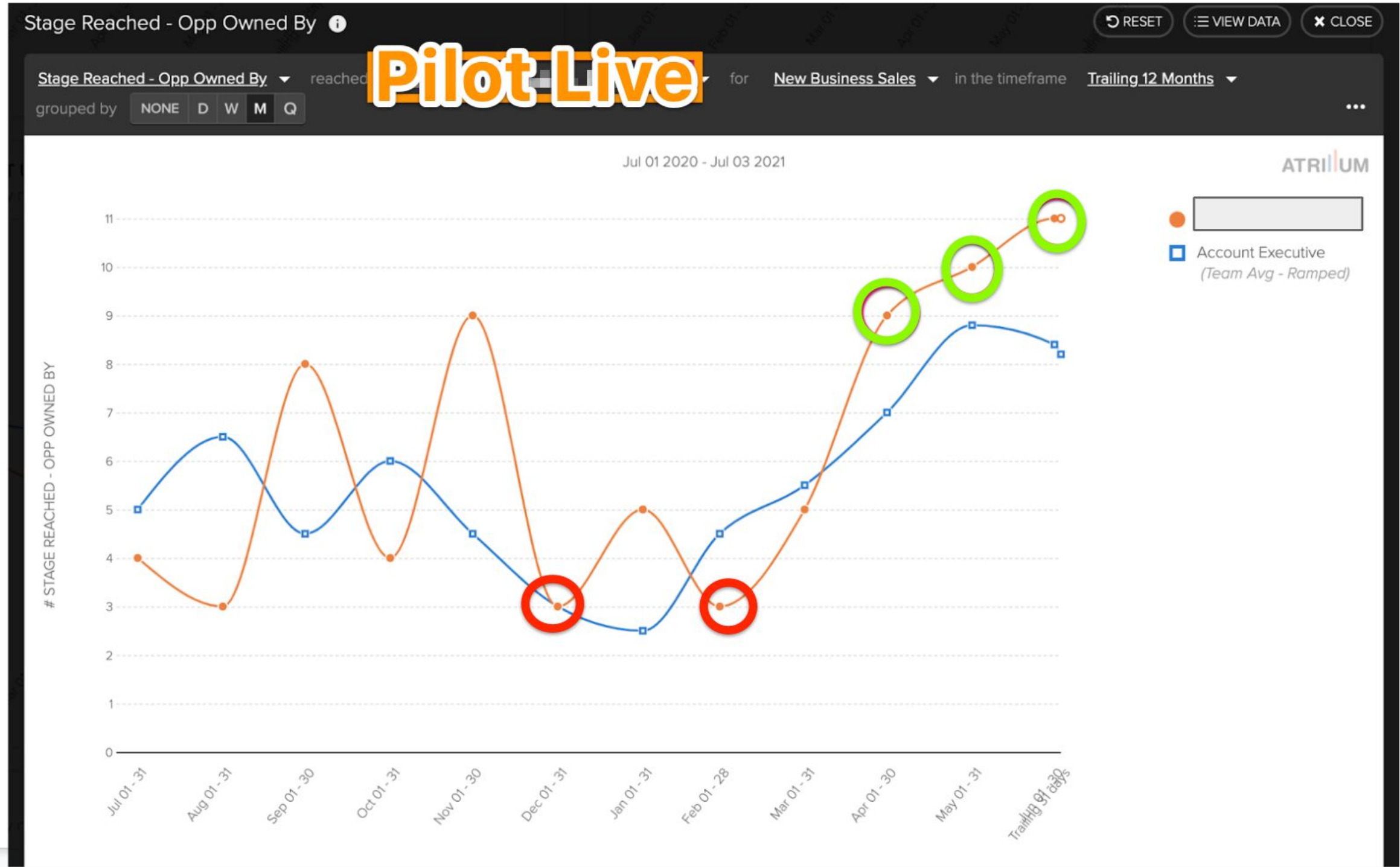**Rep had lighter conversions compared to team average at top and bottom funnel**

Data-Driven Coaching in Action: Example 2

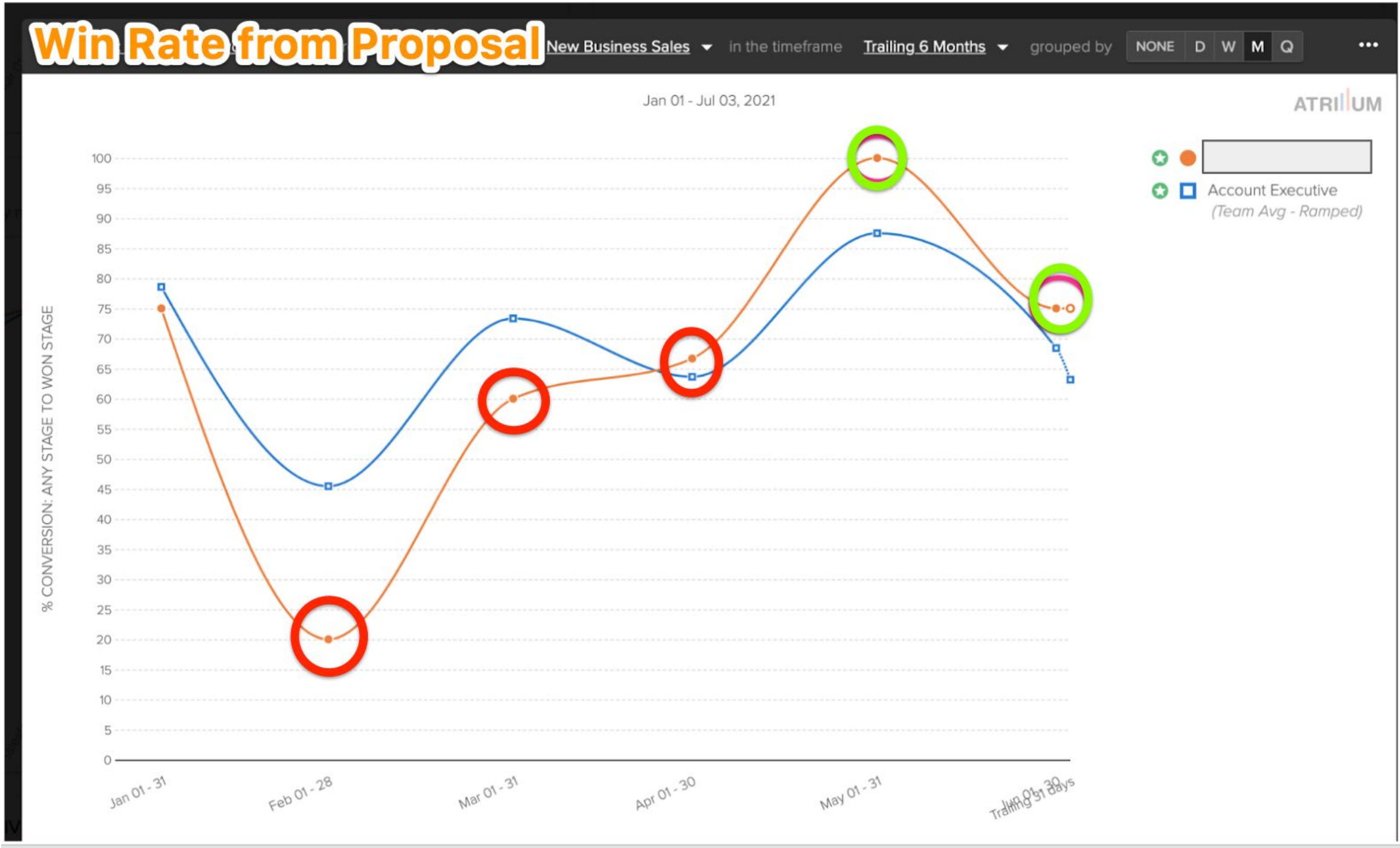**We worked on improving their behavior at the top of funnel**
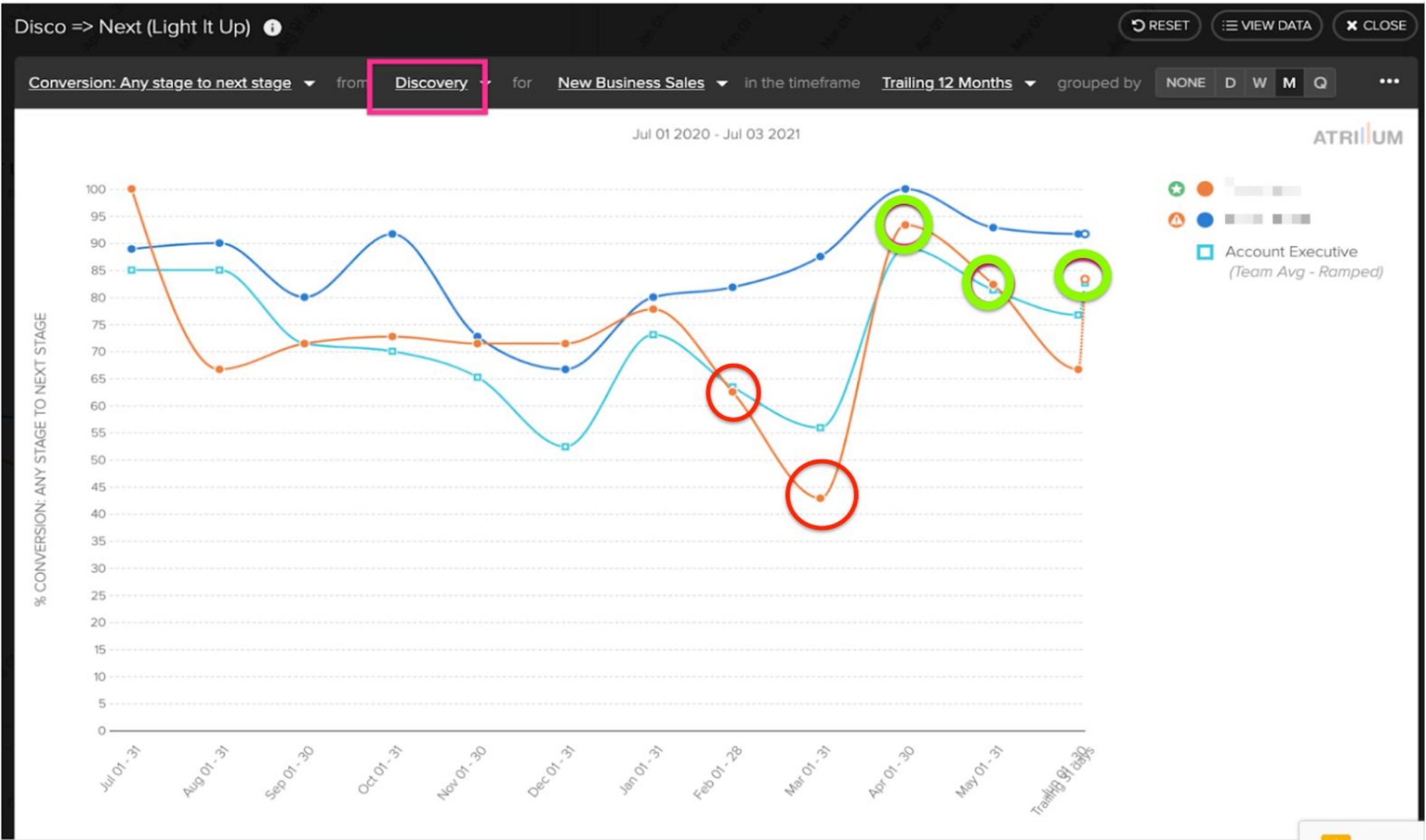
Data-Driven Coaching in Action: Example 2

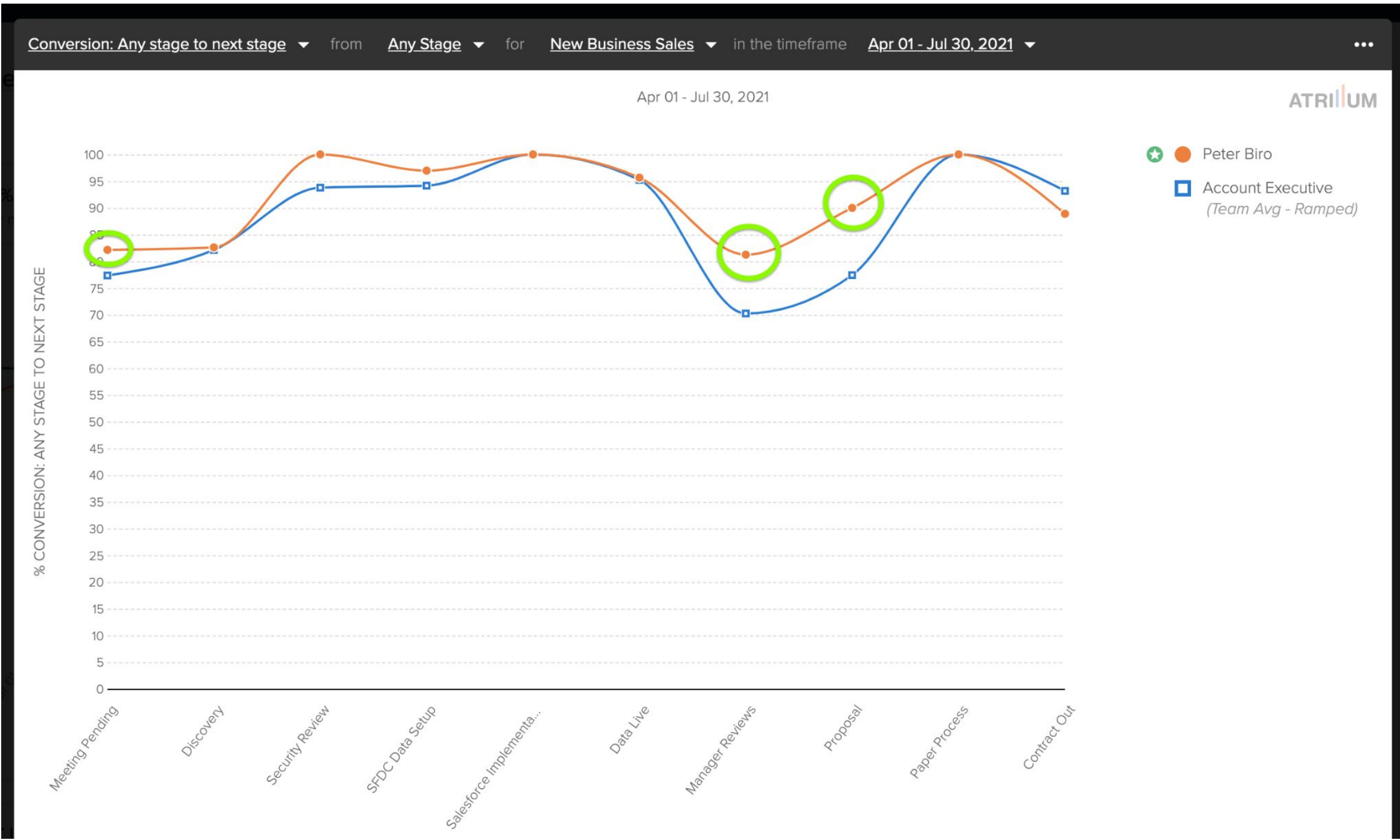By being more effective at top of funnel, they gave themselves more "at-bats"

Data-Driven Coaching in Action: Example 2

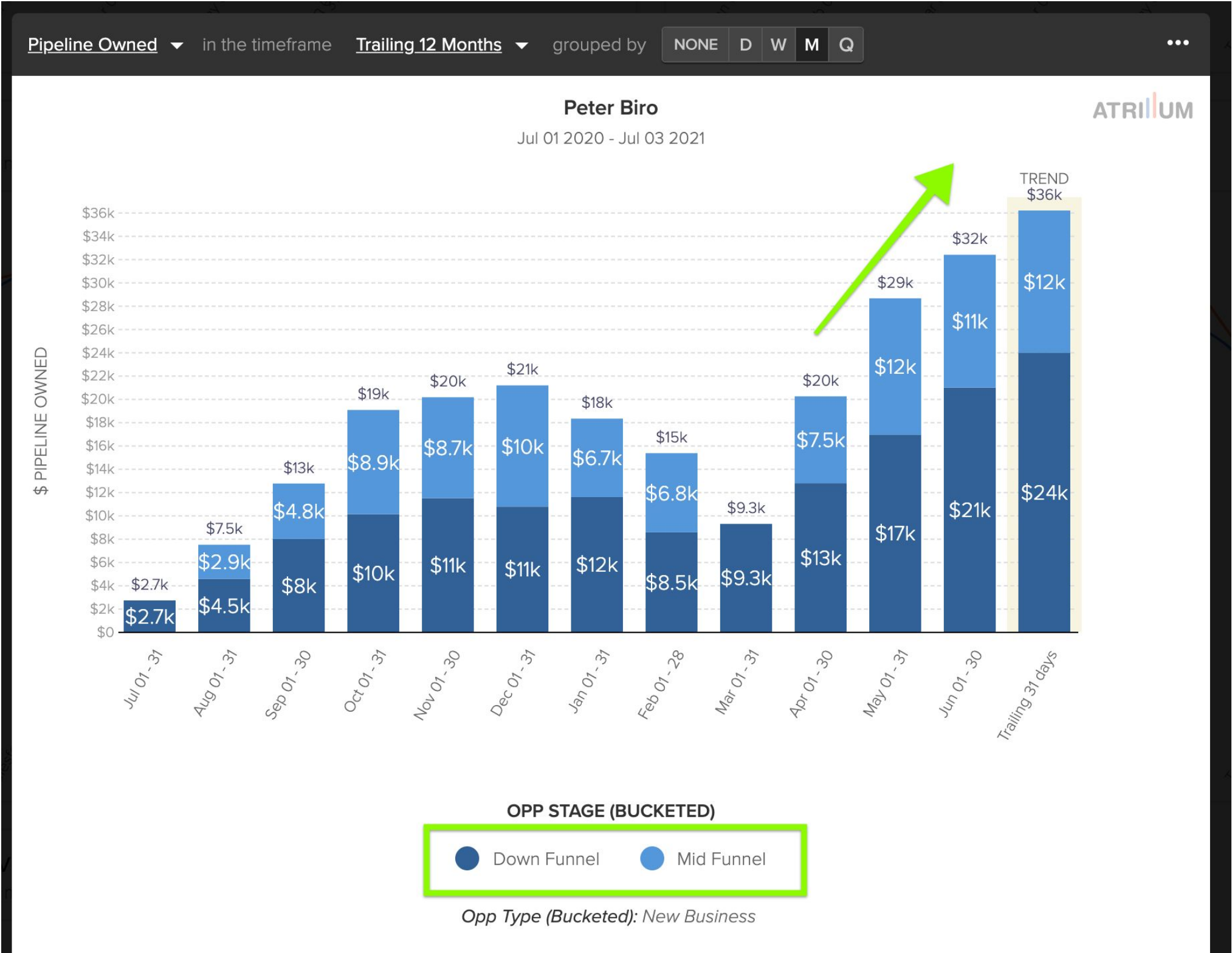**We also worked on improving some late stage behaviors**

Data-Driven Coaching in Action: Example 2

As a result, their conversion has improved all around

Data-Driven Coaching in Action: Example 2

Rep has seen far more pipeline moving downfunnel

Thank you! Get your books!