SCALE

Virtual Sales Development Council

Matt Amundson, Executive in Residence, Scale VP
March 24th, 2023

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

Salesloft.

JFrog

HubSpot

snowflake

Airtable

GTM Network

Experts in sales and marketing across the startup growth lifecycle

Marketo™
An Adobe Company

DocuSign®

GitHub

salesforce

appfolio™

Inaugural SDR Council Speakers

Ralph Barsi
VP Global Inside Sales,
Tray.io

Srinath Sridhar
Co-Founder & CEO,
Regie.ai

Quick Recap of Last Month's Presentation

1. I led a session on 5 big things
   a. It's really hard out there right now … for your customers.
   b. Hunt with spears instead of nets
   c. Update your messaging, now
   d. Succeed as a team, lose in a silo
   e. Leverage AI intelligently to increase efficiency
2. Ralph Barsi led a session on mindset
   a. How to have a winning mindset
   b. How to create the culture of a winning
3. Sri Sridhar led a session on generative AI
   a. How to have a company wide strategy for AI
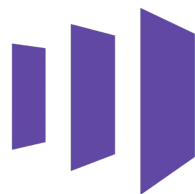   b. The history and future of AI
   c. The right way to use AI as an SDR

About Me ...

Acquired by Essilor for $430M

$1B IPO, Acquired by Adobe for $4.8B

Acquired by Vista Equity for $4.3B

Acquired by ZoomInfo for $100M

SCALE

Mission Statement for the Scale SDR Council

To create and foster an environment of SDR professionals to share their knowledge and experience with other members of the Scale portfolio to facilitate idea share for the purpose of education, community and mutual growth.

There will always be presenters, but everyone has the opportunity to speak up, ask questions or challenge others around them if they see fit.

Anyone who feels stuck should have 2-3 people they can call on at any moment to find actionable solutions to their problems.

Focus:

*Prospecting

*Qualification

*Metrics

*Optimization

PIPELINE GENERATION HIERARCHY OF NEEDS

SCALE
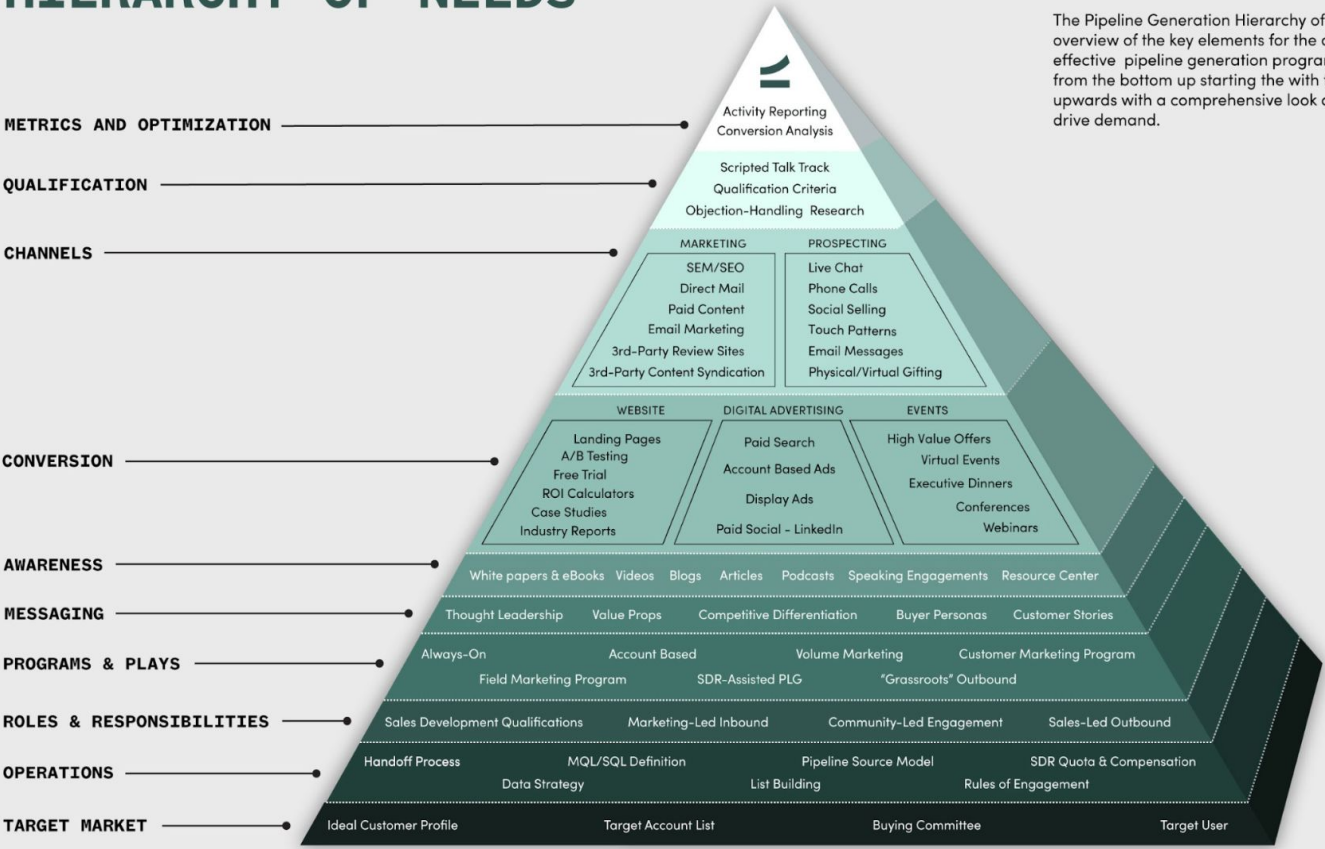
The Pipeline Generation Hierarchy of Needs provides a detailed overview of the key elements for the design and execution of an effective pipeline generation program. The elements are assembled from the bottom up starting the with target market and progress upwards with a comprehensive look at all the elements required to drive demand.

METRICS AND OPTIMIZATION
Activity Reporting
Conversion Analysis

QUALIFICATION
Scripted Talk Track
Qualification Criteria
Objection-Handling Research

CHANNELS

MARKETING
SEM/SEO
Direct Mail
Paid Content
Email Marketing
3rd-Party Review Sites
3rd-Party Content Syndication

PROSPECTING
Live Chat
Phone Calls
Social Selling
Touch Patterns
Email Messages
Physical/Virtual Gifting

CONVERSION

WEBSITE
Landing Pages
A/B Testing
Free Trial
ROI Calculators
Case Studies
Industry Reports

DIGITAL ADVERTISING
Paid Search
Account Based Ads
Display Ads
Paid Social – LinkedIn

EVENTS
High Value Offers
Virtual Events
Executive Dinners
Conferences
Webinars

AWARENESS
White papers & eBooks   Videos   Blogs   Articles   Podcasts   Speaking Engagements   Resource Center

MESSAGING
Thought Leadership   Value Props   Competitive Differentiation   Buyer Personas   Customer Stories

PROGRAMS & PLAYS
Always-On   Account Based   Volume Marketing   Customer Marketing Program
Field Marketing Program   SDR-Assisted PLG   "Grassroots" Outbound

ROLES & RESPONSIBILITIES
Sales Development Qualifications   Marketing-Led Inbound   Community-Led Engagement   Sales-Led Outbound

OPERATIONS
Handoff Process   MQL/SQL Definition   Pipeline Source Model   SDR Quota & Compensation
Data Strategy   List Building   Rules of Engagement

TARGET MARKET
Ideal Customer Profile   Target Account List   Buying Committee   Target User

SCALE

Today's Speakers

Daniil Kretts
Dir Global Sales Dev,
Esper

Kasper Valgren
Dir of Sales Development,
Spot.ai

Help is always available

- Scale GTM Platform team is here to help
- You'll make incredible connections today
- Call or email anytime
- Schedule time or a recurring meeting with our team

- My contact information
  - matt@scalevp.com
  - 310-592-9680

SCALE

Esper.io SDR Org
People, Process, Technology

Daniil Krets - Director, Sales Development

Daniil is a recent transplant from Europe and has spent the last decade in business development.

Daniil's experience encompasses multiple personas like Marketing, L&D, HR, and most recently IT and Engineering as well as multiple segments and industries.

Most recently, Daniil has been helping scale top of the funnel at Esper.io where he built out SDR teams in NA and APAC from scratch and scaled the org from 4 SDRs to 20 over the last 2 years.

Esper and our ICP

Esper is Android DevOps for dedicated devices. We help companies deploy, manage, and support Android devices at scale.

We're focusing on dedicated devices rather than employee or BYOD use cases.

Esper works best with large size (1000+) homogenous device fleets and dedicated device use cases: self-service kiosks, restaurant order consolidation tablets, etc.
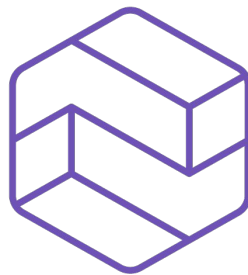
esper

Industries:
- Hospitality, Healthcare, Retail

Titles/Personas:
- Engineering
- IT (Infrastructure)
- Product

People

People

Team Structure - Hybrid, 2 days in the office

- **A team of 9 in APAC (Bangalore, India)**
  - Inbound (1)/Outbound (4)/Market Research Team (3)
  - Supported by an SDR Manager (internal promotion)

- **A team of 11 in NA (Bellevue, WA)**
  - Inbound (2)/Outbound (8)
  - Outbound Team is supported by an SDR Manager (outside hire)
  - Commercial (less than a 1000 employees) and ENT (1000+ employees) segments in Outbound (7 and 1 SDRs)

People

Hiring Profile

- 6+ months in the role
- Technical experience a big plus
- Personalization experience is a big plus
- Good Account research skills a big plus
- Founding SDR/Startup experience is a big plus

We use an assignment to test all of the above skills:

- Find 5 accounts
- Build out one of them with contacts
- Write and outbound email to one of the contacts
- Send a LinkedIn message based on that
- Leave a voicemail

People

Tenure

- Average tenure before promotion into other roles outside of SDR org is 13 months
- Promotions to Sr SDR, Commercial AE, SE
- 100% of the Commercial AE team are currently former SDRs

People

Promotion Plan

- Broken down into 6 months review cycles
- Exceed or hit quota 4 out of 6 non-consecutive months to get to Sr SDR role (5-10k base increase)
- Once you get the Sr SDR role (at least 6 months in the role) - identify your career path and get promoted into the role you'd like based on same level of performance, business need, and interview process

People

Enablement Plan

- 3 month ramp time (currently 2 on average)

- 4 week onboarding
  - First 2 weeks - product and process
  - Mock calling daily
  - Team members shadowing
  - 2 product training/enablement sessions (4 hrs)
  - Week 3 - start prospecting and calling
  - Week 4 - ramp all metrics
  - Onboarding Mentor Assigned

People

Ongoing enablement

- Weekly Team Meeting
  - Team/Process updates
  - Training
  - Everyone shares how they're tracking to quota
- Daily 8 30 AM standup
- Biweekly Bookings Review
- Biweekly Call Review (groups of 3 or more)
- Biweekly GTM Enablement Meeting (owned by Enablement team)
- Weekly 1:1s with Manager
- Skip level 1:1s with Director

Process

Process

Inbound

- 3 forms, free trial, RR based on geography
- SLAs - 10-15 minutes SLAs based on the form
- Sequences:
  - Based on forms
  - Nurture sequence (generic task every 30 days based on the trigger)
  - Trial start and close sequences

Outbound

- Commercial and ENT segments
- Commercial has 5+ industries
- ENT currently only 1 industry (Hospitality)
- Every segment/industry has 3 persona-based sequences

Process

Outbound

Outline of the
Outbound sequence:

Days	Step	Content
Day 1	1	Manual Email
Day 1	2	Call 1
Day 2	3	Call 2
Day 3	4	Call 3
Day 3	5	Bump
Day 5	6	Call 4
Day 5	7	Automated email
Day 7	8	Call 5
Day 7	9	Manual Email
Day 10	10	Call 6
Day 10	11	Referral email
Day 12	12	Call 7
Day 12	13	Automated email
Day 15	14	Call 8
Day 18	15	Call 9
Day 18	16	Automated email
Day 2	17	Automated email

Process

Account selection and prioritization:

- Accounts are assigned weekly, 50 for Commercial and 25 for ENT is the number each SDR maintains

- Based on new meetings, disqualified accounts, recycled accounts numbers each SDR gets respective net new number of accounts weekly (12 for Commercial, 6 for ENT on average)

- 3-5 contacts per account on average for Commercial, 9+ for ENT to prospect

- Account priorities: P1/2 - based on the number of buying signals and P3 is the TAM

- Accounts are pre-researched by the tool we use - Relevvo, then manually processed (validated) by market research team in India, and distributed to the managers and then to SDRs weekly.

Process
Sequences

- Sequence committee meets quarterly to look at the data and update the sequences
- Sequences have 7 calls and 7 emails on average, multi-channel
- Up to 3 steps personalized and focused on the social proof, industry, persona, use case

Technology

Technology

- Sales Nav, Zoominfo, LeadIQ for data
- Outreach for sequencing
- Salesforce and Hubspot - CRM
- Leandata for lead routing
- Avoma for call listening
- Relevvo for account prioritization
- Spekit for enablement
- Slack/Zoom/Gmail for communication
- 6sense

Working on:

Moving away from Zoominfo and find an alternative tool - doesn't work for US (LeadIQ for commercial segment and our personas works really well because we target a lot of startups)

Secret Sauce

Targeting and Account Prioritization

- Moved from hundreds of accounts to 50 a month for Commercial and 25 for ENT segments.

- Moved from refreshing accounts every 60 days to every week.

- No personalization to all first emails personalized (and eventually more steps personalized)

- Rolled out account prioritization:

  - Created a scoring mechanism based on the buying signals

  - Created a team that researches and prioritizes accounts for the team and passes them on with notes to SDRs

Account Scoring Mechanism

The account scoring mechanism takes a cohort's TAM (thousands of accounts), and scores and prioritizes them based on different ICP signals, resulting in hundreds of best-fit accounts for SDRs.

Due to our niche solution, not one signal alone is enough to qualify an account.

Our mechanism quantifies positive signal instances, which are then totaled to a final score that is assigned to each account.

Based on the score each account is assigned, the account is then prioritized into one of the following buckets and examples:
* P1: Accounts that without a doubt, match Esper's ICP
* P2: Accounts that narrowly match Esper's ICP
* P3: Accounts that broadly match Esper's ICP
* DQ: Accounts that are not within Esper's ICP

Account Scoring Mechanism

Each account is QAed by an MDR, who corrects false signal positives and adds additional notes about the account to help SDRs tailor their outreach.

Weekly feedback sessions are held between involved teams to further dial in our signals and improve account quality.

Marketing also uses the account priority buckets to target accounts for campaigns and to provide ad air cover, so that our messaging is aligned across our prospect's journey.

Account Refresh Process

- Takes place every week - 12 accounts for every rep in Commercial segment

- Run by product marketing

- On top of 12 net new accounts, every rep gets replacement for any accounts:

    - SQO'd

    - Booked

    - DQ'd

    - Recycled

Market Research Team

- A team of 3 focused on APAC (1) and NA (2)
  - Full time employees
  - Roll under product marketing org
  - Managed by Product Marketing Manager in the US
  - 1 MDR (Market Development Rep) supports 4 SDRs
  - Every MDR has industries they specialize in to ensure subject matter expertise and domain knowledge
  - Every MDR has specific account sourcing metrics to hit weekly
 - MDRs have a career path to SDR over in APAC

# Targeting and account prioritization change results

- Email reply rates doubled over 2022 (1,4% to 3,6% most recently)
- Pipeline volume and SQO generation increased exponentially (see next slide)
- ACV has increased
- Predictability, focus, and consistency
- 80% average quota attainment

Targeting and account prioritization

Pipeline 2021/2022

■ Pipeline — Pipeline 3 Month Moving Average

SQOs 2021/2022

■ SQOs — SQOs 3 Month Moving Average
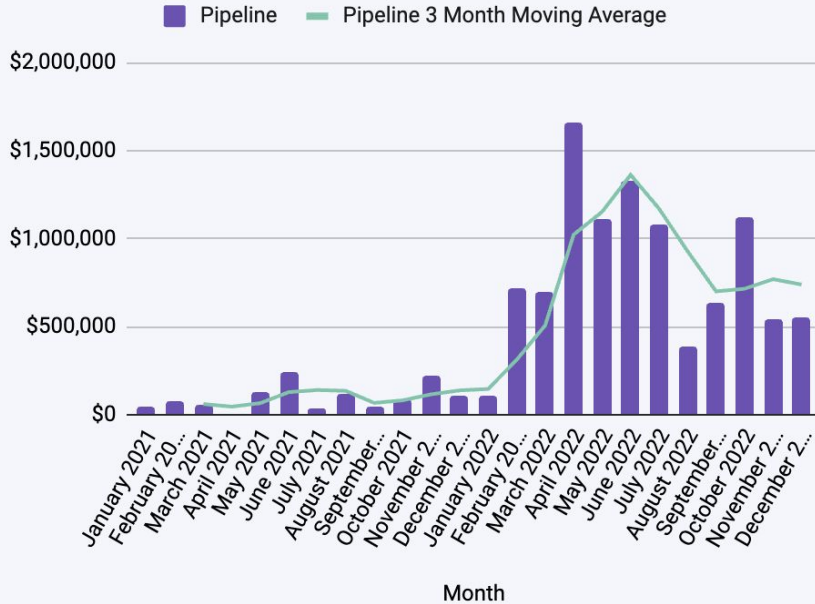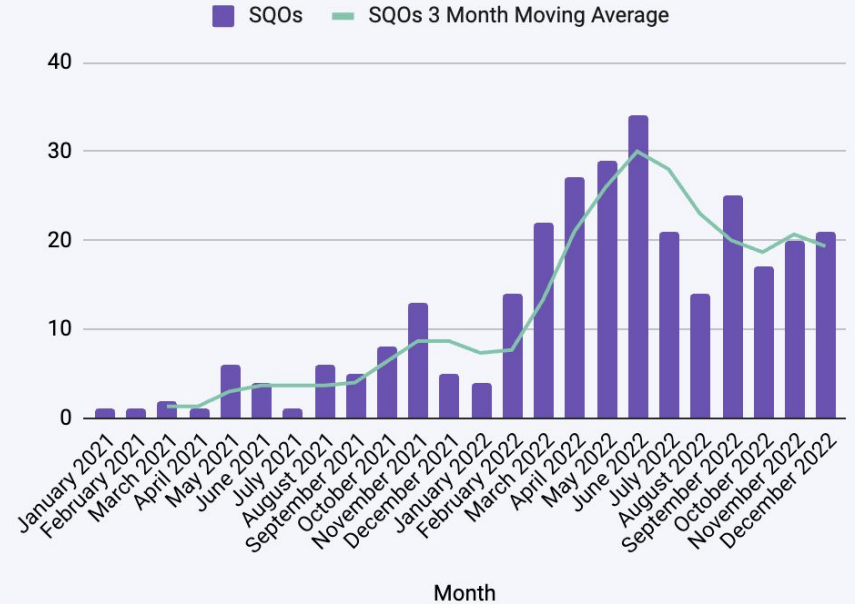
Event Strategy

We run 6-8 industry events at Esper every year and send SDRs to all the conferences.

Our process:

- If we have a list we prospect before the conference to schedule meetings at the conference floor
- At the conference, we typically have more meetings than what we've already scheduled
- We get the best conversion when we schedule meetings AT the conference floor instead of following-up post-conference
- SDRs are comped on SQOs the same way we handle any other meetings
- We found that conference are a great way to boost SDR confidence on the phones and make them feel like SMEs
- Conferences are extra - we still expect everyone to hit quota from regular meetings and treat conferences as an opportunity to exceed expectations

SDR org as a talent pipeline for Esper

- 8 promotions in 2 years
- Variety of roles and career paths
  - SE, Commercial AE, Channel BDM

How did we do it?

- Ran our own recruiting and proved we can hire well and have great retention rates
- First 2 people we promoted helped us prove that we can develop people into Esper champions that make a difference when they grow
- Initial success and crisp career pathing led to a lot of interest in SDR candidates internally for a variety of roles

Connect with me:
https://www.linkedin.com/in/daniilkrets
danilkrets@gmail.com

SCALE

spot.ai

Sales Development Team

Kasper Valgren
Director, Sales Development
Spot.ai

- Originally from Denmark
- Married to Regan and together we have Mattias and ???
- Former chef
- Former Army Sergeant (Danish Royal Guard)
- Over the last 5 years, I've built several successful Sales Development Organizations in the startup space.

Our Customers & ICP

Our Customers & ICP

We serve <u>multi-location business</u> with movement of people, vehicles, & things
as well as classic video security use cases.

Our goal is to create
"Safer Workplaces,
Smarter Operations"
We help businesses turn video footage into actions with our AI camera system.

Industries focused on are:
- SLED
- Retail
- Industrials

\+ we are category creating right now. Video Intelligence is still a new concept much like BI was 10 years ago.

People

My Team

All SDR's are based in the Lehi,UT office - Hybrid schedule

Current Team is 14

- 2 inbound
  - Inbund, Events, & Webinars

- 12 outbound on 3 verticals
  - 8 ramping & 4 Sr. SDR's
    - SLED
    - Retail
    - Industrials
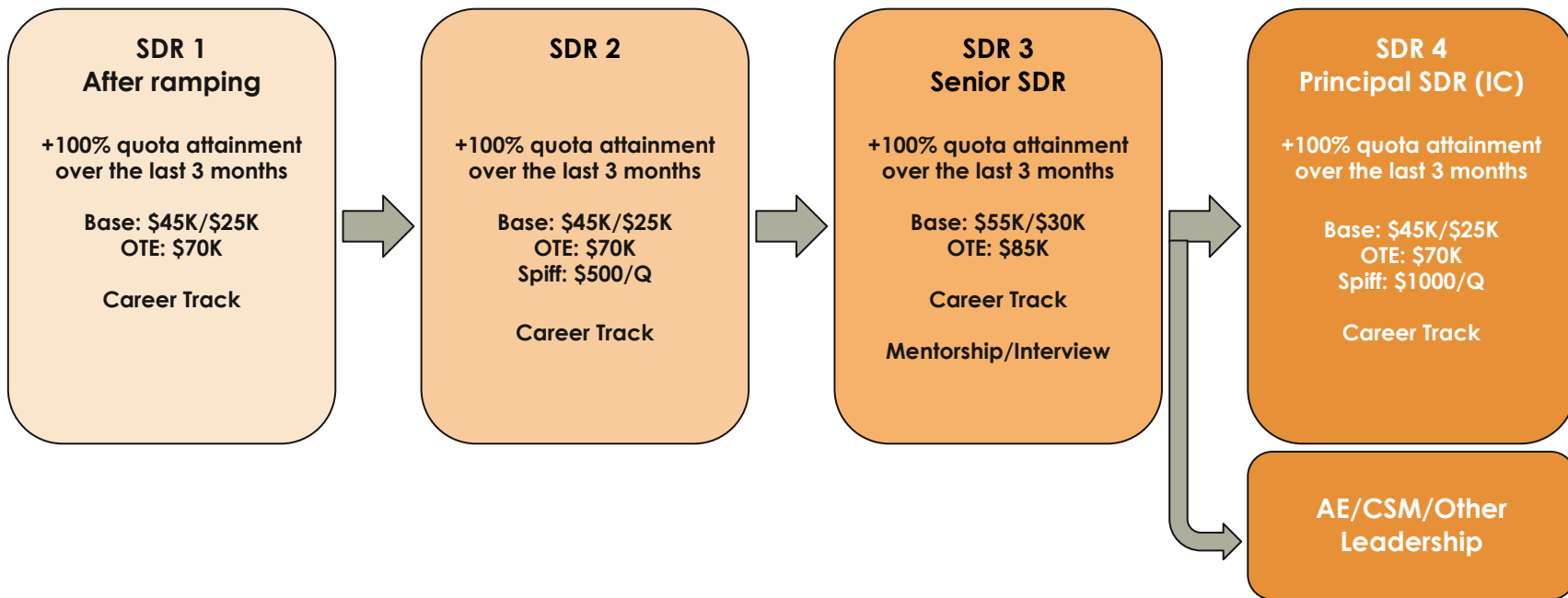
MM focused (+251 emp./11 loc)

Hiring & Onboarding

Hiring profile:

- Former SDR or customer facing background
  - ABH (some of the best hires have been from the service industry)
  - NO SDR experience is needed(Some might argue that former SDR's are harder)

- Onboarding (90 days)
  - Product does not matter, it's all about the persona! (First 3 months especially)
    - My reps do no sell SPOT AI, we sell meetings **to people!!!!**
    - Reps get on the phone on day one!
    - Apprenticeship based model
  - MBO Plans in the first 90 days + ramping quota with accelerator plan built in

Promotion Paths

SDR's should have micro promotions along their first 12-19 month

SDR 1 After ramping	SDR 2	SDR 3 Senior SDR	SDR 4 Principal SDR (IC)
+100% quota attainment over the last 3 months Base: $45K/$25K OTE: $70K Career Track	+100% quota attainment over the last 3 months Base: $45K/$25K OTE: $70K Spiff: $500/Q Career Track	+100% quota attainment over the last 3 months Base: $55K/$30K OTE: $85K Career Track Mentorship/Interview	+100% quota attainment over the last 3 months Base: $45K/$25K OTE: $70K Spiff: $1000/Q Career Track

AE/CSM/Other Leadership

Ongoing Enablement

SDR Table Talks

Weekly Meetings where SDR's can hear from other leaders of the organizations within the company.

We have had table talks with team members from

- Sales
- Product/engineering
- CS
- Exec Team
- Customers

Book Club

We have an ongoing book club as an SDR Team to improve their knowledge of the SaaS, SDR, Sales, & loads of other relevant things.

Weekly reading & presentation

Process

Alignment

Daily

Morning meeting at 9am

- Creates alignment daily
  - 90% recognition & people focused
  - 10% business focused

Daily team call blitz

- Daily my reps sit down for a 30 min call blitz within their smaller teams to share knowledge and learnings from the previous day.

Weekly

Team call blitzes

- Mixed team call blitzes allow for learnings from other team members

Call Review

- Team Members submit calls for review by peers

Team meetings for sub-teams

Outbound Strategy
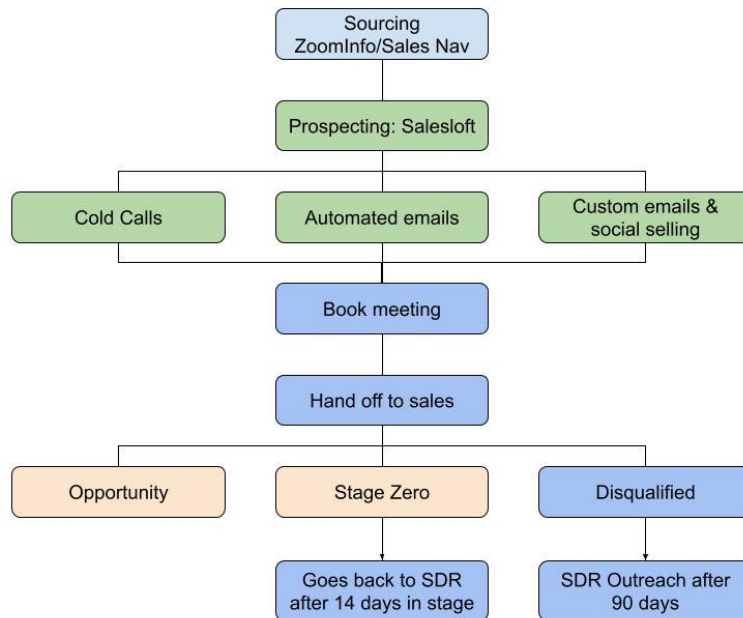
Targets varies from vertical to vertical.

Generally we like to surround our prospect with competitive intel before we approach them.

So we will reach out to 3 front-line leaders and gather information about issues they face.

Then reach out to correct persona

Playbooks are key tools in the outbound process.

SDR Workflow - Cold

- Sourcing ZoomInfo/Sales Nav
- Prospecting: Salesloft
  - Cold Calls
  - Automated emails
  - Custom emails & social selling
- Book meeting
- Hand off to sales
  - Opportunity
  - Stage Zero → Goes back to SDR after 14 days in stage
  - Disqualified → SDR Outreach after 90 days
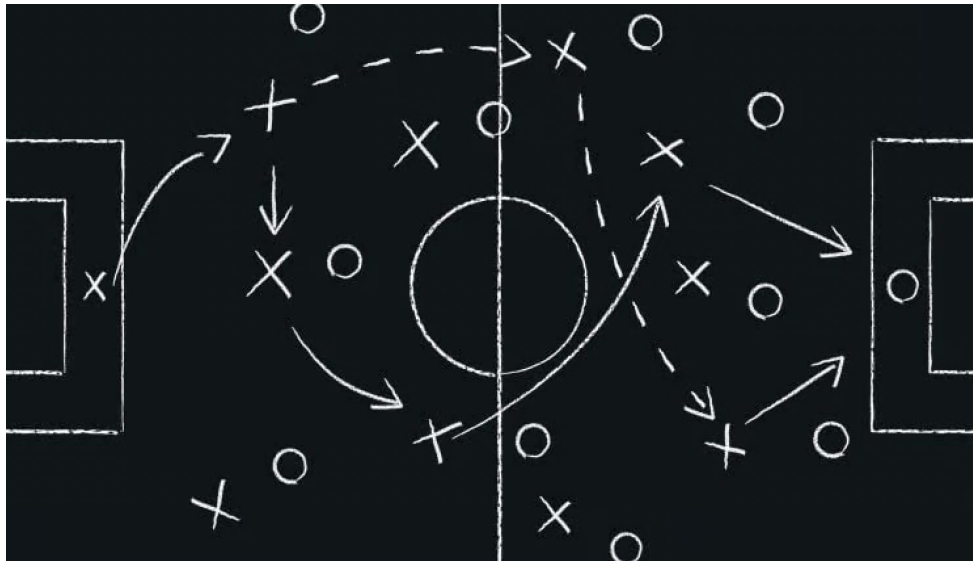
Playbooks

Segmented & Specific

I never go after any lead without having a playbook ready to go!

For many a playbook is an onboarding guide or a SDR Handbook.

For me they are tactical handbooks that are used on a day to day.. and recently been key to unlocking new verticals.

Without a playbook my reps are at a disadvantage since their lips won't be loaded for the calls they are about to make.

Taking the I, out of sales

Typical email which has been sent out - 37% open rate & 5% reply rate

Hi George,

On a whim, I Googled your company and came across your profile. Sending a cold email hoping you're the person to chat with.

I'm writing to introduce the Spot AI camera system which uses advanced tech for **people counting** and heat mapping for insights into foot traffic, busy times, and areas of your store that need attention.

Spot AI helps retailers like All Star Elite and Strand Books make data-driven decisions to **reduce loss, identify risks, and increase efficiency.**

Our tech works with your existing cameras, unifying all locations onto a single cloud dashboard.

Feel free to say no if you don't see a fit, but would you like to learn more?

Best,

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Best,

Tech stack

Current Technology

Scrapped Technology

Keys To Success

Motivation & Incentive Strategy

Effort vs. outcome

Outcomes	Effort
0 demo	130 dials / 40 emails
1 demos	110 dials / 30 emails
2 demos	90 dials / 20 emails
3 demos	x dials / 10 emails

Motivation & Incentive Strategy

Freedom is free

Soft incentives are super valuable in the SDR Space!
- SDR's want 3 things:
  1. Money
  2. Promotions
  3. Not to be at work

NOT BE AT WORK:
If my SDR's hit 3 demos booked/day they get to go home.
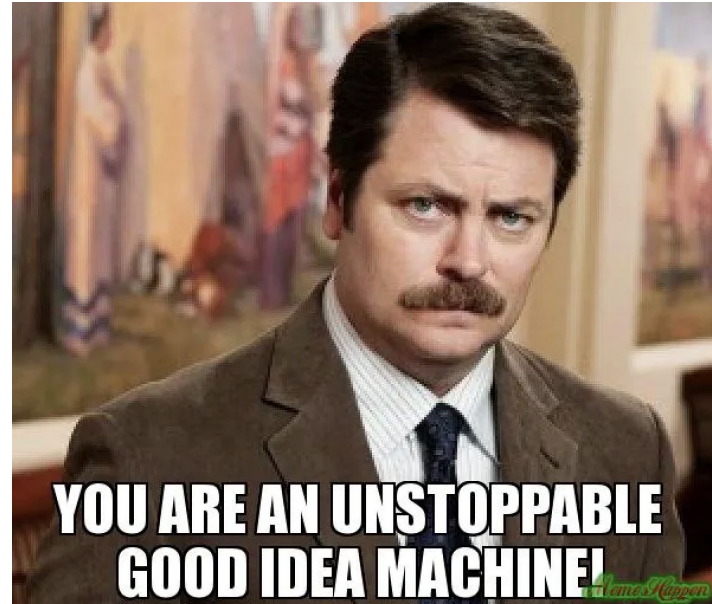
BUT

They can also choose to bank these demos and if they hit 12 by Thursday EOD

Then they can take friday off! **AND it does not count as their time off!!!!**

Takeaways

- Teams need stronger bonding & alignment than we think
- Persona is everything
- Build & use your playbooks
- Taking the I, out of sales
- Effort vs. outcomes
- Freedom is free!

YOU ARE AN UNSTOPPABLE GOOD IDEA MACHINE!

I'd love to connect!

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Questions?