

SCALE

SDR Council

Diagnosing missed quotas: A framework for leading SDRs

August 9, 2024

Today's SDR Council leaders



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Today's Agenda

- Welcome, Introductions, and Survey (30 min)
- SDR Council: Diagnosing missed quotas: A framework for leading SDRs (30 min)
- Open discussion (30 min)

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

Advisory

Been-to-Market Expertise



Advising our portfolio
companies with bespoke
GTM consulting

Content

Step by Step Guides



Distilling decades of
experience into concise
GTM playbooks

Events

The Power of Community



Connecting our network
of EIRs, Exec Advisors
and portfolio execs

Introductions

1. Name
2. Title
3. Company
4. Favorite Olympic sport





Survey

What are your top GTM challenges today?

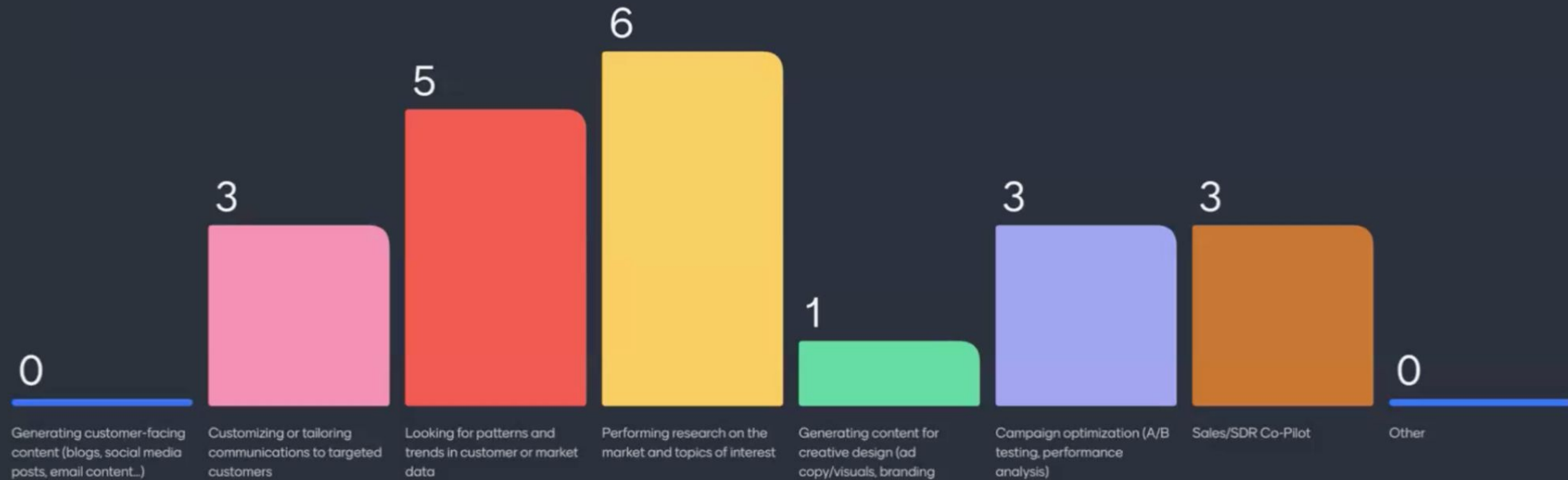
17 responses



What impact is AI having on the tools and processes you currently employ in your department



To the extent that you are using or planning to use AI in your department, which of the following are use cases you are pursuing?



What is favorite tech in your stack?

9 responses



A word cloud of favorite technologies in a stack. The words are arranged in a roughly rectangular shape, with some words oriented vertically. The colors of the words are: demandbase (green), fathom (yellow), sfdc (orange), attio (blue), robert (red), plaid (purple), regie if approved (blue), its still chat gpt (pink), and qualified- looking into (purple).

demandbase
fathom
sfdc
attio
robert
plaid
regie if approved
its still chat gpt
qualified- looking into

It's rough out there.
It's *also* an
opportunity.

Topline Strategy

- **Off the rails:**
 - *Categorize & quantify* what just happened
 - *Validate & Enrich* hypothesis
 - *Communicate & Collaborate* to possible solves
- **Early Warning System:**
 - Macro
 - Team
 - Rep



Part I

Quantitative Review

The Metrics Story

- **Waterfall: Which metric(s) down?**
 - Sales Accepted Opportunity (least control)
 - Completed Meetings
 - Booked Meetings
 - Activity (nearly full control)
- **Context:**
 - Delta to norm
 - Trend & Seniority
 - Team/AE Capacity
 - Other factors: PTO, Seasonality, etc



Part II

Qualitative Review

Mapping the numbers to the narrative

- *Avoid Confirmation Bias – don't tip your metrics hat, esp early.*
- **Start with rep**
 - Where they notice change?
 - What's working?
 - Magic Wand?
 - What story do metrics tell? What's the truth behind it?
 - Your Customer lens
- **Go to customer's customer**
 - (especially if later funnel break)
 - SQL to SAO the classic chasm.
 - Dispositions
 - Forecast



Part III

Comms

How you deliver is as important as *what* you deliver

- ***Visibility + consistency = dependability***
- **Identify Stakeholders**
- **Anchor the reality**
- **Power of a plan: What, so what/why, now what**
 - **Detail**
 - **Root Causes**



Part IV

Early Warning Systems

From React to Preempt

- The importance of regular metrics keeping
- 1:1 Cadence inclusion

Metrics per Rep / Territory / Aggregate Team

- Total Usage/Penetration %

- Nurture Account %

- 3+ signal account %

How is our capacity?

- AE # active Opps

- AE % dormant Opps

How is our effort & what's working?

- Activity Levels (by channel) & by tenure

- Touches per booked call

- Marketing attribution % rate

Now what?

Calculate Rep ROI to start ([link to template](#))

Perform diagnostics for missed quotas ([link to template](#))

Build the reporting house & SDR forecasting

Thank You!