Predictable Revenue

HIRING & TRAINING

PART 2

Outbound Sales Learnings from 2018

A complete guide of Predictable Revenue's 2018 Podcasts

COLLIN STEWART

INTRO

Predictable Revenue is the "Outbound Success Company". We help companies grow faster with Outbound Sales.

Our Co-Founder Aaron Ross is the author of the book **Predictable Revenue** and was one of the first 150 employees at Salesforce where he built the outbound methodology that is practiced around the world in sales teams today. **Our other Co-Founder, Collin Stewart,** is the host of our weekly podcast where he interviews B2B sales leaders on the biggest opportunities and challenges in the industry.

We've taken all of our podcasts from 2018 and put them into a handy 6 part eBook. Learn how to overcome the biggest challenges facing B2B sales teams today, ensure you're leveraging opportunities, and learn from best practices from industry leaders.

Collin Stewart, Co-Founder of Predictable Revenue. Host of our weekly podcast.

CONTENT
PART 2

Editor's note: this is part 2 of a 6-part series.

Why Rigor Teaches New SDRs The Critical "Why" Behind The Role: In Conversation With Sarah Affleck

PODCAST

Because of the growing demands and often ambitious expectations of the Sales Development Representative job – accounts, contacts, emails, calls, meetings, the list goes on – it would be understandable if sales development leaders focused solely on the day-to-day tactical responsibilities of the role when onboarding new hires.

Those expectations, after all, have to be met.

Despite those very real pressures, however, not taking the time to discuss how the role fits within the larger context of the company is to do it a disservice. Yes, SDRs have to call, email, and book meetings.
But, the gig is more than just that, right? It's supporting the company – development, customer success, design, you name it – by creating pipeline. Revenue growth, a critical piece at every organization, starts with the SDR.
"What we've learned is that when a new SDR starts at Rigor, it's important to tell them not just the responsibilities of the job, but why they were hired in the first place. I want them to understand what gap they are filling, so they instantly have a sense of purpose," says Sarah Affleck, Director of Sales Development at Rigor, on a recent edition of The Predictable Revenue Podcast.
"There are pretty significant targets here as an individual contributor [50 net new contacts per day], so I want them to know this isn't some arbitrary number I'm throwing at them. We've created a formula for success – and I want each SDR to understand what went it to it, and why it will make them successful."

BACK TO CONTENT

How does Rigor teach the *"why?"*

Like any good business process, effective onboarding comes from testing different methods and systems, in order to land on a thorough practice that drives results. For example, when Affleck started at Rigor nearly four years ago, the company's onboarding process was pretty simple: new hires jumped right in and navigated their way to success. Of course, the company's managers were there to help – it wasn't entirely sink or swim – but it was hardly a detailed system.

Fast forward to today, and Rigor has developed a detailed onboarding process that not only encompasses training for a new hire's respective role, but also a holistic look at each department in the company and how each of those parts works in unison to propel Rigor forward.

Sarah Affleck.
Director of Sales Development at Rigor

This is the foundation for the *"why"* behind their job. *"Everyone learns how their jobs play a critical role art in relation to other positions in the company. An engineer, for example, will learn what an SDR's metrics are, and what their day to day looks like. It helps build a mutual respect for what everyone does,"* says Affleck.

"Bringing someone on and training them on how we work and what we do, how we're able to impact the customer is the best part of the job."

Rigor's onboarding document

To help each new hire visualize their first few weeks, Rigor designed a thorough onboarding document. From initial schedules, to departmental breakdown, to company culture and the different breakout sessions each new hire is to attend – this manual is as comprehensive as it gets.

Below are just a few examples of what's included in Rigor's sweeping onboarding doc:

- **First-week overview –** this section, designed in calendar format, highlights both the general company and SDR-specific training the new hire will take part in. Thursdays are work from home days for the entire company. During training this can be a chance for an SDR to come in and work one on one with their manager;

- **Rigor's Core Values** – Customer First, Be Genuine, Do The Right Thing, Own Your Work, Use Resources Wisely and Win As a Team;

- **Living By Rigor's Core Values** – how the company empowers its employees to live the core values;

- **Communication options / policies** – Slack is the primary internal communication channel. Email, on the other hand, is the primary channel for customer communication. If a team member has their headphones on, use Slack to communicate with them. Lastly, the *"best places to find things out at Rogor"* is to consult the intranet, Google it!, ask in Slack, and ask manager;

- ***"Who We Are"*** – a short breakdown of the C-level team, as well as senior engineers;

BACK TO CONTENT

- **Company-wide org chart –** a breakdown by team, with an explanation of what each team does. For example, sales *"converts prospects into long-term customers."*

- **A short breakdown of company mission** – why should customers care about website speed? (SEO, online sales, conversion rates, user engagement, operations costs, usability);

- **Highlight of the SDR role** – how does an SDR generate leads? Conduct a large volume of outbound sales activity (emails, calls LinkedIn etc.) Work closely with sales reps. Generate interest by being the first point in the sales cycle. Track all activity in Rigor's CRM. Schedule meetings.
  "For SDRs, we have playbooks for everything – cold calls, sales development lifestyle, and shortcuts, to name just a few," says Affleck.
  "But in the overall onboarding doc, we really want to show both how the larger picture comes together, as well what each specific role does. For example, sales development is a critical role in sales, and we want to make sure we describe why that is, and share that with the rest of the company too."

Onboarding impact

In addition to giving new hires (and every Rigor employee, for that matter) a detailed look at their specific job, and a fulsome picture of how every department in the company works together, Affleck says the Rigor's onboarding process also provides employees with one other benefit: **INSPIRATION.**
For example, with Affleck's team of SDRs, the onboarding process clearly defines their tech stack, their activity metrics, and their quotas. But, it also illustrates what those numbers mean to the growth of the company. SDRs perform a very important function, and at Rigor they are made aware of that from the moment they start.

"I think the biggest impact is that A players are willing to run as fast as they can towards the goal, but they need to know where the goal posts are. So, if you can set those expectations, you are setting those people up for success, as well setting yourself up," says Affleck.

"As a whole, it has created overall job satisfaction. Most people want to be successful, but can only reach their highest potential when they are enabled to do so."

For more on Rigor's onboarding philosophy, as well as Affleck's sales development leadership methods (including how she manages her team's activity metrics), **check out her full interview on a recent edition of The Predictable Revenue Podcast.**

DocuSign's Director of Sales Productivity, Mike Fiascone, teaches his formula for creating superhuman sales reps

PODCAST

If you're looking for help, mentorship, or specialized training to boost your sales career, it won't take you long to find what you're looking for.

We work in a very engaged industry with robust online communities, well-attended seminars, specialized trainings, informal meetups… I could go on forever.

If you need sales help, it's out there, ready to be absorbed.

As an active sales leader myself, I've long been in awe of the support the sales industry offers. And I've been on both ends of the stick – receiving help when I've needed it, and guiding others when they've reached out.

Reflecting on all those avenues of help, however, got me thinking about what is lacking in the sales support system. As I mentioned, we do the tactical, nitty gritty sales stuff really well. But what about the emotional side of sales? What do we do about all the stress we encounter on the job?

Let's be honest: our gig is a grind. Month after month, and quarter after quarter, we're under the gun. And that pressure can (and does!) take its toll. Personally, I've felt the full weight of this job more times than I count. And, once upon a time, so did Mike Fiascone, Director of Sales Productivity at DocuSign. Stress was an accepted part of his day-to-day.

That is, until he decided to change it.

> "Being in sales for so long, I've been involved in so many trainings – from negotiation, discovery, closing plans to mapping out accounts. But, there was a point in my career, about 10 years ago, were I went through some personal challenges that forced me to reevaluate who I was and how I approached stress," says Fiascone, on a recent edition of The Predictable Revenue Podcast.
> "It was then I realized that if I applied certain methodologies that I used in my personal life to my professional life – dealing with stress, developing more personal relationships, not taking stuff so personally – things would explode. And they did."

The brain

Before we get to that much-desired professional explosion, it's instructive to first understand, in basic terms, how the brain works.

The brain is divided into three parts:

The neocortex (the frontal lobe; the conscious mind): this is where we process human language, our thoughts, and our imagination. The neocortex accounts for only 2 – 10% of our brain.

The limbic brain: this is the emotional centre. The limbic brain governs our behaviours, our emotions, and our judgments. Unlike the neocortex, this portion of the brain is subconscious.

The reptilian brain (the oldest brain): this is the part of our brain that governs our bodily functions such as heart rate, breathing, and body temperature. Like the limbic brain, this part of the brain is also subconscious.

The subconscious portions of the mind, ultimately, serve as protection. For example, when we encounter moments of stress and we don't have the tools to deal with the situation in question, our body automatically goes into reflex and stores that experience in our subconscious mind. As a result, that situation, and our reaction to it, doesn't go away. We hold on to it, and it becomes part of our psyche.

According to Fiascone, we're storing countless numbers of those reflexive stressful reactions for protection.

***"We know there is a buried treasure in our subconscious mind when we are experiencing things that are automatic and we wouldn't chose it,"* says Fiascone.**

"For example, maybe we're fearful. Would you chose fear if you had a choice? Probably not. So it must be coming from the subconscious. And that could be coming from when we were 7 years old, and we felt unsafe in a particular situation. But, there's good news. There is a way to harmonize these feelings, understand the root cause, and direct it to what you do want."

Redirecting negativity

Shifting your feelings in a more productive and positive direction, says Fiascone, also comes down to three distinct steps:

- **Seeing your emotions**
- **Feeling your emotions**
- **Hearing your emotions**

For example, you've sent a contract to a potential client, and their procurement department has sent it back, challenging your quote. Your competition, they claim, is charging much less. They want you to do better, and get back to them within 24 hours.

As a result, you're feeling a rush of anxiety, and a flurry of thoughts start running through your head: how can I go cheaper? Do I want to go cheaper? And, how can I get this together in one day?

For Fiascone, this is when he closes his eyes and simply asks himself: "would I choose this anxiety?"

The answer, of course, is no. The anxiety is reflexive, stemming from our vault of autonomic reactions. But, instead of ignoring those difficult feelings, Fiascone closes his eyes and visualizes every image he can relating to this anxiety – losing the deal, getting fired etc.

From there, he starts to focus on how that anxiety is affecting his body (what is he feeling? And, where is he feeling it?)

"At this point, I start describing those feelings – in my neck, my back, wherever," says Fiascone.

"And while I'm doing this, I make sure to consciously breathe in and breathe out."

Finally, Fiascone listens closely to the parade of negative thoughts running through his head. Sure, those words can be difficult, even angry at times. But, those thoughts need space, he says.

They need to be heard.

"Listen to the volume of that inner monologue. Listen to that negative running narrative. Whatever that anxious voice needs to say, give it the space to say it," says Fiascone.

"But there is a gift here. Once you finish this, and decide to send that processed feeling towards something you do want, that's very powerful.
I get excited now, when I go through something like this. Because I know it's leading me here, to a place of better understanding, and you get to move towards this question: if I could choose the feeling, what feeling would I chose?"

Mike Fiascone.
Director of Sales Productivity at DocuSign.

Choosing positivity... and becoming superhuman

Once you've run through those steps, there's one more thing to do.... do it again. This time, however, you repeat the steps, but swap confidence for anxiety. For example, visualize what that confidence looks like, feel that confidence in your body, and listen to all of the confident things you can conceive of.
Now, you're ready to respond to that email from that client. In fact, you're ready to respond to any email, pitch in any meeting, or handle any call. Your clients, regardless of who they are or at what stage in the cycle they are at, will feel it. And they'll respond to it.
You just have to choose to do it. But once you do, you'll be superhuman in no time.
"When you're not in a reactive place, you are powerful. Really, really powerful. People can't touch you. We live in a world of highly reactive people. I'm just choosing not to be one of them," says Fiascone.
"Shifting your perspective is such a powerful gift. But, with it comes responsibility. Because once you know, you can't blame others for anything anymore. It's not for everybody, but for those that want to be superhuman, especially in sales, getting the mind, the heart, and the will, in alignment will help us come from a place of gratitude and love And that is the way we want to live our lives."

For more on Fiascone's thoughts on mindfulness – as well a discussion on his his years in sales, mentoring reps, and common traits of successful sales professionals – check out his recent edition of The Predictable Revenue Podcast.

How FLEXE's Dominic Atkatz gets his new SDRs phone-ready in two-and-a-half weeks

PODCAST

Being able to hire new team members is a truly great position to be in. As more talent joins the team, more work gets done, new ideas get out into action, and company culture is elevated. Oh, and hiring probably means your company is doing well, and is looking to continue growing.

Despite the obvious positives, bringing on new team members, regardless of whether you're hiring seasoned specialists or novice individual contributors, brings with it a host of new challenges. And with sales, in particular, onboarding new team members comes with an added critical element: these people have to get up to speed as quick as possible, and start contributing.

Let's face it – we work in a demanding industry, with quotas waiting to be hit at every turn. So although it's a great experience to bring on new sales team members and ensure they're onboarded thoroughly, they have to start selling as soon as possible.

For **Dominic Atkatz**, Sales Development Manager at Seattle's FLEXE, that means ensuring SDR candidates are evaluated for their intelligence, motivation, and hustle.

> *"Hiring is the first thing, it's where is all starts,"* says Atkatz *"So we really want to see how they prepare, and how they view the process of connecting with the prospect."*

FLEXE's three-part hiring process

FIRST STAGE

In this stage, FLEXE tries to understand what motivates their candidates to be in sales.

For example, a question a prospect would have to answer at this stage is: "what do you want to be doing in your 50s?" This gives Atkatz and his team a look into what drives them, and why they think sales is the career to get them to those goals.

SECOND STAGE

In this stage, FLEXE tries to understand how deeply a prospect understands their business model, and the space they operate in.

For example, prospects will be asked to identify 7 – 10 accounts that they would reach out as a FLEXE SDR, and why they believe those are good accounts.

Then, the prospect is asked to pitch the FLEXE team on their favourite app (any app). This sound simple, but it is deceptively challenging – prospects are forced to describe how an app helps their lives, and articulate the benefits of a product (just as they would in a demo).

THIRD STAGE

In the third stage, the prospect comes in and gives a mock presentation of FLEXE. This stage is to show how comfortable the person in a relatively uncomfortable scenario. They are presenting to strangers, and the FLEXE team makes sure to challenge them, ask questions, and gauge how the prospect responds. -->

-->

“This is something that we’re always trying to gauge in the people we want to bring on – how will they respond in uncertain circumstances? When you are on a cold call, and you’re explaining something is entirely new to someone who would rather not take a cold sales call, you have to figure out a way to resonate with them,” says Atkatz.

“So, do some thorough research up front. That’s why we ask them to have 7 – 10 accounts that they think would work for FLEXE. We want to see how they prepare, and how they view the process of connecting with the prospect.”

Engagement during the hiring process

So, FLEXE makes sure they get critical information from their SDR prospects. But that communication should go both ways, adds Atkatz. Sure, FLEXE is going to ask questions, and gauge candidates based on the answers they get back – that’s to be expected.

Atkatz, however, also expects candidates to ask him and his team questions throughout their hiring process. He wants to see how engaged potential hires are.

Prior to the presentation at FLEXE, Atkatz is judging whether the candidate is reaching out and asking questions. Are they trying to understand Flexe? And during the presentation, Atkatz is looking for somebody who will set the landscape of the industry and asks questions. They want to see if you understand the business landscape, and that you care about the prospect, and their pain.

“I think it’s important to lean on me as a resource, but one question I love asking at the end of the presentation is: “how do you think you did?” That tells me whether the person self aware, and whether they can they improve?” says Atkatz.

“I strive to be the best manager I can, but we are always looking for bootstrappers, and people who can make changes, and think on their feet.”

FLEXE's onboarding

Okay, they got the job – a new group of team members is joining the team, and it's time to get rolling. What's next?

This is when FLEXE hands their new hires the company's onboarding milestones sheet. That document has 3 major milestones, with tasks to complete within each.They typically line up by the first 30 days, 60 days, 90 days. To move on, SDRs have to complete the previous milestone.

The most critical thing the onboarding plan ensures is that it gets people practicing, and gets SDRs on the phone as soon as possible. To start, new FLEXE SDRs get on the phone and manage inbound leads, as well as shadow the 'Are We A Fit' calls the other members of the team are having.

FLEXE's revenue is dominated by outbound, but the questions asked, says Atkatz, are nearly the same in either context.

And, for further clarity, FLEXE has developed three critical planks for a successful call:

- ASK REALLY GOOD QUESTIONS
- TELL A STORY IN THE FORM OF A CLIENT CASE STUDY
- MANAGE EXPECTATIONS

"When they get started on the phone with our inbound leads, they also get a look at our process sheet – the document that helps new SDRs move through the call and determine if they are on the line with good candidates," says Atkatz.

"The process is a map of the conversation."

For each of the calls FLEXE's new SDRs are on, team leads and management review them, as well as how they handle filling out the process sheet mentioned about.

"We review at least 3 – 5 calls that an SDR is on. We want to how they adhere to the note taking template, and whether or not they are asking the right questions," says Atkatz.

"We review the new candidate calls together – managers and leads – so we ensure that the SDRs are on the right track."

FLEXE's note-taking document

FLEXE'S note-taking doc is used to record all the critical data from a call to fully understand the prospect and ensure process. The doc is typically filled out by SDRs, and passed off to AEs. SDRs go pretty deep in the sale process, they are not appointment schedules.

Below are some of the highlights from the doc:

• What is the state of the business? (What direction is the business going? How have the past few years been?)

• What are the growth initiatives? (Here they want to ensure the initiatives of the prospect align with the account as a whole. And, they want to understand some corporate directives – are they after lowering transportation costs? Improving logistics services?)

• What are the business units? Brick and mortar? Pop up stores? B2B wholesale?

• What is the nature of the supply chain network – points of manufacturing? Points of import? Points of sale?

• What are the components of variability with the supply chain? Do they sell seasonal products? Do products sell on promotion?

• Are there frequent new product launches?

• What are the typical warehousing needs? Any special requirements? Storage needs?

• Towards the end of the call, FLEXE wants to learn the options being evaluated, whether it be competition from another vendor, or sticking with the vendor / tech the prospect is already using.

• Past solutions? What have the used? What has their experience been? How fast / simple was it?

C: WHERE ARE THEY IN THE EVALUATION PROCESS?
A: WHO SIGNS OFF?
N: WHAT IS THE INITIATIVE / NEED?
T: WHAT'S THE TIMELINE AROUND THE INITIATIVE? DATE OF DECISION?

Dominic Atkatz.
Sales Development Manager at Seattle's FLEXE

Pre- and post-call research

As mentioned up top, Atkatz, and his team, are interested in the research their SDR prospects produce during the hiring process. And that interest remains when they're on the job as well.
As such, FLEXE has developed pre- and post-call templates, in order to prepare AEs for call, and ensure any follow up requirements for a prospect don't fall through the cracks. The pre-call template will highlight what the best value proposition is to focus on for the specific account, as well as any potential deal killers so the AE can prepare their objections. The post-call template, on the other hand, covers the key deliverable for what is expected from Flexe, and from the account.

"For me, one of the things I did to save myself a lot of time was writing everything down. I'm an athlete, and I've been the worst on a team, and worked my way up. I couldn't do that without a process," says Atkatz.
"So, I wrote everything down in order to start building that process."

Thanks to Atkatz, now all FLEXE's SDRs have a process so they can get up and running just weeks after they were hired.

For more Atkatz's thoughts on onboarding SDRs, check out the rest of his interview on The Predictable Revenue Podcast.

How to hire, and develop, great salespeople with Pendo's Bill Binch

PODCAST

Modern sales culture – especially amongst the ranks of sales leadership – has become a data-drive environment. If we use the right tools, and implement them as we need, there isn't anything we can't know about the performance of our respective sales teams.

Modern sales culture – especially amongst the ranks of sales leadership – has become a data-drive environment. If we use the right tools, and implement them as we need, there isn't anything we can't know about the performance of our respective sales teams.

It's made us more efficient, more nuanced in our approach to sales, and more pro-active when, inevitably, we have a slow stretch.
It's awesome.

But while we've progressed rapidly in the realm of data and sales visibility, hiring the high-performing reps to actually navigate the busy weeks, months, and quarters every business faces has been rendered a secondary consideration.

We're refining all the critical infrastructure around our sales funnels – but what about the people needed to actually fill it? If we're going to understand every last detail about our sales org, then we should make sure that we have the team in place to handle the capacity we need.

Right?

"From a big picture view, sales leadership has to make sure deals are closed, forecasting is done, and learn to demo a particular tool in order to sell it. So, when you think of the role of selling, and where we spend most of our time, as sales leaders and managers, it is in that stuff,"

says Bill Binch, Chief Revenue Officer at Pendo, on the recent edition of the Predictable Revenue Podcast.

"The other most important thing, though, is to have people in the seat and trained up. This is just as important as all the functions of the job itself. If you think about world-class selling organizations, they always put a lot of thought into hiring."

Profiling your candidates (Editor's note: we chatted with **Brian Gerrard, Outreach's Director of Sales**, about how candidates can evaluate the company they are applying to work for. You can read about our interview here, or listen to the podcast here)

BACK TO CONTENT

According to Binch, the first step on the road to successful (and efficient) hiring, is accurately profiling the kind of candidates you want to attract.

Companies, of course, already think about the candidates they want to hire, but the profile they draw is often a reflection of another company, not their own. For example, some sales teams want to hire from the big shops such as Oracle, Salesforce, or SAP because they believe the salespeople that have experience at those massive corporations come with refined skills. Other companies prefer to hire from startups because they believe those environments teach a sales team how to hustle and get the job done, by whatever means necessary.

Neither scenario, however, is reflective of the values of the hiring organization. Binch believes this is backwards – why shouldn't a company hire based on the values they establish, foster, and uphold? Why look to other shops as the template for what kind of person you should hire?

"Really, what are the values that we have? Do you want gritty, hustlers? Or, do you want polished salespeople? ***Hire the ones that match your values,"*** **says Binch.** *"And make sure you hire against those values. That's the key. Have the cultural values, make them public, and match your hiring to them."*

PENDO'S CULTURAL VALUES:

- Promote life outside of work
- Brutal Honesty
- Maniacal focus on the customer
- Biased to act
- Show me the data
- Be transparent
- Freedom and responsibility

Bill Binch.
Chief Revenue Officer at Pendo

pendo

Each of these pillars represents a component of life at Pendo. As such, the candidates Pendo hires, are attracted to those values, and are able to mesh with, and enhance, the team as a result.

"The best thing you can look for in a sales rep is a history of performance, and hustle. But, those are typical. Starting internally, and building from there, is critical," says Binch. *"That's where things can get unique and special."*

Developing a thorough interview process

Once you've established a set of cultural values, and attract candidates based on those beliefs, it's time to actually start interviewing. It is time to transition from the philosophical to the functional.

And just like the internal focus put on attracting the right candidates, it takes some strategizing to ensure the interview process yields the varied information needed to properly assess a candidate.

"You don't want to ask the same old questions, and you always want to respond in a timely fashion," says Binch. "I believe, people in the hiring process should be handled with the utmost efficiency and care, no matter where they are in the process, or for what job they are applying for."

For sales hires, the pendo team decided to split the interview process into 5 distinct sections, each guided by a different them, and led by a different person in the company. That way, a candidate gets to meet numerous members of the team, and each interview doesn't traverse the same ground as the last.

PENDO'S SALES INTERVIEW TOPICS
(not in order)

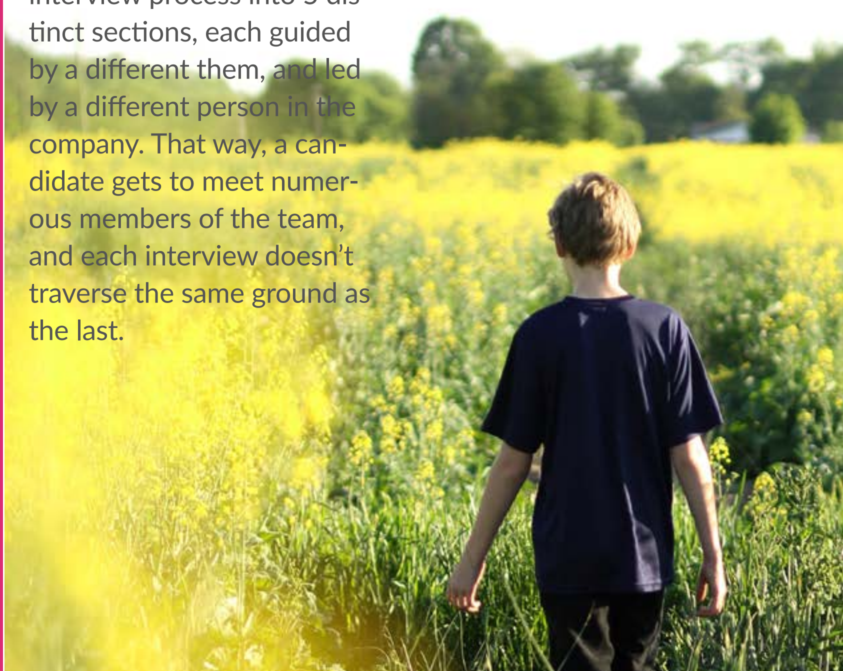
Prospecting, metrics, and discovery.

Technical acumen and intellectual curiosity.

Culture fit.

Selling against competition.

Deal management philosophy.



“

Because they’re good, detailed salespeople, the team at Pendo tracks the progression of each candidate as they would manage a sales cycle.

“We make sure we are cognizant of making sure we move candidates along to the next stage when necessary. And we have metrics, too. We track how many candidates get a job offer. Or, we track how many candidates actually get to the acceptance stage,” says Binch. *“It’s important to look at these numbers to determine the quality, or strength, of your candidate pipeline.”*

Making objective decisions on your candidates

No matter how nuanced, and intelligent, your interview process is, it’s still hard to objectively rate a candidate. Human nature is to defer surface level insights such as *“I like him or her”* too often.

Of course, it is important to like the people you hire, but that can’t be the deciding factor. Furthermore, not everyone involved in the interview process is going to feel the same way about every candidate.

In those cases, how do you establish a fair evaluation?

“We use applicant tracking system, where you have to rate the person from 5 – 1. When it is straight 4s and 5s, it is very easy. When it is straight 2s, it is also very easy,” says Binch.

“But, when the rating is all over the place, it can be difficult. For instance, I have had some serious concerns about candidates in the past. In those cases, we met as a team, the team was very persuasive. So, I don’t know I have the perfect answer for you, as it is a hard process.”

An important element, adds Binch, to consider over the entirety of the process: is a candidate’s star rising or falling? Some candidates enter the process guns blazing, and blow everyone out of the water. But as more about them is learned, and they are forced to answer more questions, their star fades. They don’t have the experience needed for some of Pendo’s core sales requirements.

Other times, a candidate start slowly, but shows resilience and grit over the course of the process. That person, as a result, proves that have what it takes to be on the Pendo team.

"Is the candidate keeping up the intensity? That can be very important," says Binch. *"I want to see them at their best, and that they want the job."*

Making tough calls

An unavoidable reality of the interview process, regardless of the system you choose to employ, is that worthy candidates don't get chosen for jobs. There aren't enough to go around, and, inevitably, someone leaves disappointed.
In those cases, Binch says it **is critical to inform the candidate that didn't get selected about your decision over the phone.** Don't send an email, or, worse yet, disappear completely. They have given a lot to try and join your team, and deserve to be told why they didn't.

It's tough, but it's a learning opportunity for both parties – you can share some insights and feedback with the rejected candidate, and they're able to ask questions that may benefit them the next time they're in an interview.
"I make the call to say we aren't going to hire them, and I'm candid on those calls," says Binch.

"I want them to hear it directly from me. It's not my favourite call, but if someone committed a lot of time to us, it is important to do that."

For more Binch's thoughts on hiring, including tips on effective training and how to keep newly hired team embers excited for their first day, check out the rest of his interview on The Predictable Revenue Podcast.

Why Sales Leadership at SmartRecruiters Invests Heavily in Training and Developing its SDRs

PODCAST

Training your staff – I mean, really training them – is hard.

Sure, you may have an onboarding process (a detailed one or, in some cases, not) and a person in charge of training new hires. But just having the basics in place, while a step in the right direction, is only the beginning of training and coaching your people. It's more than welcoming new hires, showing them where everything is, and teaching them how to discuss your product or service.

To really develop and inspire your team takes consistent and nuanced effort.
"It certainly is a lot of work. But, as a manager, you have to ask yourself 'where am I doing my hard work?'" says Chris Bryson, Head of North American Sales Development at SmartRecruiters, on a recent edition of The Predictable Revenue Podcast.
"Sometimes, we can get bogged down in doing some of the sexier things like going to meetings with executives and discussing the future of the company. But, does that move the needle? Where your time is best spent is always with your people."

SmartRecruiters' Training Journey

It all started with a compliment.
An executive at SmartRecruiters complimented Bryson on the activity the SDR team engaged in each day. They were calling like crazy.
But something wasn't right.
And once the management started digging into the numbers, says Bryson, they started to see trouble. The company wasn't getting the opportunities we needed. And 'calling like crazy' turned out to be 120 calls per week, spread across 4 reps.

"This is not what you want," says Bryson, with a chuckle.

"So, we started on a journey to find out why we weren't motivated to call. Why was this the case?"

At first, Bryson thought his team might just need a bit of inspiration. But, as Bryson and his boss Taft Love (a previous guest on the podcast as well) began to build out their reporting infrastructure to analyze where the team was falling, they realized it wasn't an issue of drive or interest in the job.
The team needed some training.

> *"So, once we had the reporting infrastructure in place to understand what is going on, we identified two things – reps were having trouble opening up calls. Or, they were talking way too much. On some calls, we had reps talking for 10 or 15 minutes, and not setting up meetings,"* says Bryson.
> *"So, we realized this was a skill gap. And, we realized we needed to put training infrastructure in place to address that skills gap. That's when we started to get the idea that we needed a framework and an actual certification program for our reps to go through."*

The Framework

When you embark on a project as important as designing a framework for training your reps, it's easy to slip into designing a lengthy, complicated process.

There's always more to teach, right?

But, says Bryson, a training framework can, and should, be rather simple. And that's exactly how they approached the training framework at SmartRecruiters. For all new training topics, regardless of what they are, reps at SmartRecruiters follow a four-step plan.

STEP 1

Talk to the team. SmartRecruiters sales leaders discuss what the particular problem(s), identify issues and set specific next steps for training from there.

STEP 2

Presentation time. It's at this point that training is conducted, and homework is assigned.

STEP 3:

Review. Each rep goes over his or her homework with a manager. And, where necessary, management discusses where people did well, and where there is room for improvement.

STEP 4

Analysis. Once everyone has been worked with, leadership takes all the results (from the entire team) and analyzes it. At this stage, they make sure to make the results anonymous so they can pinpoint any trends in the work and highlight overall strengths and weaknesses. From there, management will address what it needs to address.

Chris Bryson. Head of North American Sales Development at SmartRecruiters, *on a recent edition of The Predictable Revenue Podcast. "Sometimes, we can get bogged down in doing some of the sexier things like going to meetings with executives and discussing the future of the company. But, does that move the needle? Where your time is best spent is always with your people."*

Training Topics

As mentioned above, this straightforward framework is applied to any and all training topics for SDRs at SmartRecruiters. But, as well know, there's a lot of potential areas on which to train an SDR.

So, what are some of the training areas tackled by leadership at SmartRecruiters?

1) Opening up a cold call.
"If you can't get past the first 15 seconds of a call, you're not going to go anywhere. So, this is a great place to start," says Bryson.

2) How to transition to qualification.
"The focus here is to teach how to not make this transition jarring. That can be difficult for people, and we spent quite a bit of time on it," adds Bryson.

3) Building interest in the call and establishing pain.

4) Objection handling.
"In our industry we have a fairly specific set of objections that generally come up, so we review the in depth," says Bryson.

5) Training SDRs on how to seamlessly loop in customer stories for social proof.

6) The close...and next steps (either setting a meeting for an AE, or a follow up call for themselves).

"When we onboard people we have the run through a mini bootcamp of that. And, those topics come up every two quarters as part of standard review. We also have special sessions on issues like pricing, and how to handle brush offs. We'll do those every 1-3 months," says Bryson.
"Our reporting infrastructure allows us to determine how often we need to revisit these topics. It always come back to the data. It will tell us whether we need to coach the entire team on a certain issue, or whether it's an individual coaching situation."

Keeping It All On Track

As simple and straightforward as SmartRecruiters has made their training process, when you have a big team of reps, all of whom have aggressive quotas to hit, finding the time to review and coach your team can be challenging.

You don't want your reps learning, and not not having enough time to implement that knowledge, right?

At **SmartRecruiters**, training sessions are booked around call times – either at lunch or in the afternoon. Generally, **SmartRecruiters** holds 2-3 team training sessions per month, each of which lasts between 45 minutes and one hour. That said, as the quarter draws to a close, management may only schedule one session in the final month to make sure reps are full steam ahead on closing the quarter strong.

The company also started hosting fireside chats with its **CEO**, about one year ago. The fireside chat, hled bi-monthly, is a chance for the SDRs to ask about topics such as varied as product vision or objection handling.

"The reps are required to come up with questions based on the topic of the chat. It's great for quick learning, and to give reps confidence asking an executive questions," says Bryson.

"The impact on our team has helped them speak to executives better – more confident and more concise. That's been great."

And, ultimately, that confidence Bryson mentions is what this is all about. Yes, the more you train your reps, the better the chance they have at making numbers. And making numbers is a good thing.

But, stresses Bryson, this is also about helping people. It's about giving them the tools to succeed, for themselves and for the company.

> *"The goal is to make your people great. In sales development, there is so much opportunity for those folks. So, you should want to create sales people for the organization. You are the steward of that journey,"* says Bryson.
>
> *"We're advancing our craft in the best way we know how."*

For more on Bryson's detailed SDR training methods, check out his recent edition of The Predictable Revenue Podcast.
check out his recent edition of The Predictable Revenue Podcast.

Why Collibra's Joe Bisagna Stresses Developing Business Acumen for SDRs

PODCAST

When you're as fascinated with the world of sales development as we, and our listeners, are, you end up talking about training often.
(Check some more thoughts on detailed training here)
That focus, of course, is warranted. After all, if we want new meetings, pipeline and, ultimately, revenue, then the new SDRs coming onboard at companies need to understand their product and how to sell it. And for the most part, the industry is holding up that end of the bargain. Messaging workshops, demo training, discussions of value propositions, intense studying of buyer personas – all routine parts of sales training.
But according to Joe Bisagna, New York-based Regional Sales Manager at Collibra, the industry is missing a critical competency when training SDRs: business acumen.
"We're great in this era of sales development at teaching sales cadences. We're great at teaching the features and the benefits of our complex solutions and offerings," says Bisagna, on a recent edition of The Predictable Revenue Podcast.
"We're not great at developing a grasp of how our customers' businesses operate."

The Importance, And Development, of Business Acumen

For Bisagna, business acumen comes down to having a nuanced understanding of the needs, wants and goals of the businesses one sells to. And that understanding is cultivated to prove to customers that you know you can help them.

Even the best value prop, or the most beautifully written email, can fall short in this area because both tend to focus specifically on what a particular good or service does. But, in a world full of emails and phone calls, even the most "well done" prospecting can get buried if it doesn't include examples of your leads' businesses.

It will help you cut through the noise.

We've become obsessed with scale. So, there are great SDRs out there trying to get to the same executive, even if they aren't competing in the same market as you. So, there are a lot of really good emails, voicemails etc. that sound somewhat the same being delivered," says Bisagna.

"There are a lot of product focused messages out there. And, people want to intrinsically know that if they buy your solution you are going to help their business. So, an easy way to show that is that you at least have a hypothesis about how their business operates. That builds trust, rapport and helps people think they want to do business with you."

But don't mistake the development of business acumen as simply another teachable piece on an onboarding checklist. Bisagna has made that mistake in the past.

Rather, business acumen, he says, is a critical thinking skill that each SDR needs to develop on their own, with guidance from a manager or sales leader.

"This really is a critical thinking exercise. But the way I've seen it approached before was a top performing SDR is ready for the next step, and they ask for help. They want to know more about their market and the customers," says Bisagna.

"So, sales goes to customer success, because they are considered the experts, and a meeting is scheduled for three weeks later, attended by half the people it could have been, and it's full of case study presentation. And the case study are delivered through the lens of how we helped this customer. It's great content, but how does that describe the business challenge that the customer was facing? Storytelling is critical to sales, but I want the folks on my team thinking about the customers business."

To facilitate this kind of critical thinking, Bisagna designed a process to stimulate his company's SDRs to look at a business with an inquisitive eye, and in an -depth fashion.


BACK TO CONTENT

Collibra's method:

1. Choose a vertical Collibra does business in, and a dream company to sell to within that vertical.

2. Research ways that company makes money, and ways they can save money (3 ways for each).

3. Design a tailored pitch for three named executives at that company (5 messages per executive).

4. Present the tailored pitch in a one-on-one meeting.

5. Along with a manager, analyze the messages sentence by sentence (and make any edits necessary).

6. Go to market with your with your work.

Of course, *"research"* is a broad term, adds Bisagna, and can be challenging for new SDRs who don't yet know all of the tools available to them. If necessary, Bisagna stresses the importance of showing reps where they can access valuable company info – The Wall Street Journal, Squawk Box, financial news or company disclosures.

> *“I do think that some folks are learning very interesting things in school. But, I don’t think students fully understand how the customer business operates. They may understand some business functions – like how to do basic accounting,”* says Bisagna. *“It’s really important for us, though, to look to an SDR role to break through the clutter. It is an area of focus for us, to understand how our customers do business and where to look to learn that.”*

Joe Bisagna.
New York-based Regional Sales Manager at Collibra

Business Acumen for SMBs

So, you might be thinking, the Wall Street Journal or press releases might be good sources of information for enterprise level prospects. But, what if you sell to to mid-market companies? Or, what if startups are your ideal customer? Little, if any information, is easily available for such companies.

So,where does one look?

“We knew we had to change things up, when we started looking at SMBs,”
says Bisagna.
“We found SMBs didn’t have a wealth of information in the press, but they were more streamlined. They had a less complicated org structure, and typically and very focused product with their mission statement posted right on their website. So, we used that in our messaging.”

By incorporating specific vocabulary used by the company, you show your prospects that you did your research and that you understand what they want to accomplish.

In addition to a shift in research, SMBs also present a change in behaviour. For example, while enterprise level executives generally have assistants reply to your requests for a meeting, executives at SMBs can be reached directly. And, if and when you do get a decision maker on the phone, they will often give you time to pitch right then and there.

As such, it is important to be prepared for that shift in organizational behaviour, and be ready to share the information you've gathered in your research, as well as discuss your company in detail quickly.

The Inspirational Qualities of Business Acumen

Yes, developing business acumen in your SDRs means more work – more work for your SDRs, and more work for your managers and sales leaders. So, how do you position, and include, that extra work so everyone involved (in particular the SDR) is excited, inspired and understands what's expected of them? After all, those cadences need to be run, right?

Bisagna says SDRs should be given a clear illustration of what a year in the life of the SDR role looks like. By doing so, you're able to discuss the importance of business acumen, and show how it makes the role a more nuanced and elevated position.

> *"When outlining the SDR role, what we say is that you're gonna do three things – learn the job and start hitting quota, actively work with AE to close deals put in place, and proactively bring ideas back to the business because you have so many conversations with prospects,"*
>
> says Bisagna.
>
> *"By doing this, it shows the development possible. Candidates get excited. And, it shows that you want more from them, instead of just hitting the phones and sending emails. They get excited about the future, and where they can grow in the company."*

For more on Bisagna's views on business acumen and developing the SDR role, [checkout his edition of The Predictable Revenue Podcast.]

Playing the field: how to evaluate your next sales job with Outreach's Brian Gerrard

PODCAST

I read something recently that made me smile.

Brian Gerrard. Director of Sales at Outreach

Ryan Holmes, Hootsuite CEO, wrote a terrific piece in The National Post (one of Canada's national newspapers) about the current roaring Canadian job market for salespeople, brought on by an ever-growing innovation boom. Even though I've been in the industry my entire professional life and spend my days in knee-deep in business development, I'll admit this idea caught me a bit off guard.

As Holmes discussed in his piece, so often when we discuss the need for tech talent, we focus on recruiting top tier developers and designers. But at every growing firm, there's a growing sales team. And they too need good people. But, as any sales professional will attest, not all sales gigs are created equal. Far from it, in fact. And as we navigate the new roles and responsibilities that unfold for salespeople over the next handful of years, understanding how to judge, and ultimately pick, the right roles will be critical. A lot is coming our way, and we need to be ready.

"My ultimate goal was always to be part of startup that had a great story. I wanted to be a part of those stories you here – the Googles or Facebooks of the world. You join a small team and grow until you're a billion dollar organization," says Brian Gerrard, Director of Sales at Outreach, on a recent edition of The Predictable Revenue Podcast. "But, finding that can be really hard to see when you're young, and you don't yet know what to look for."

What to look for

So, you're playing the professional field, and your resume has piqued the interest of a few companies. Both look okay on the surface – no red flags, knock on wood – but you can only choose one.

How do you know which is the best opportunity?

Well, naturally, a lot of that depends on where you're at in your career. For example, are you looking for a senior sales role? Or, is it time to head into management and move on from your quota carrying days? And, what's your appetite for risk? Have you caught the early stage startup bug, where you can make your mark on small team? Or, do you prefer an established company with less risk?

For every job hunter, there's a different answer for those questions, and a litany more.

But, according to Gerrard, there are some fundamental features everyone should look for in a new gig:

PRODUCT

BOSS

CULTURE

"In my journey, I always thought evaluating the product was the first place to start, but I realized I was missing all of the other stuff. For example, was I considering the boss as just as a boss, or as someone I really wanted to work with?," says Gerrard.

"And, what's the culture like? Is this a job where I will have the freedom to be myself, or are they so stuck on process that they are going to force me into something that I'm not comfortable with?"

Evaluating the product

Good salespeople can do a lot of things... and meet a lot of quotas. But even the best in the profession struggle when trying to sell a less-than-stellar product. To avoid that pitfall, and a major one at that, it's critical you learn all you can about a company's product before joining the team.

Beyond speaking directly to customers – which you could do, of course – gathering information about a product can come from a number of different angles.

For example, clients, reviews

and competitors. That will help you better understand the particular market, and how people are assessing both the product in question, as well as the others in that space.

Another important product related question: how clear is the value proposition being conveyed? If the company you're looking at isn't doing a great job talking about its product, or they have too offerings and their messaging is convoluted, that's a problem.

In fact, Gerrard faced that very issue years ago and struggled as a result.

> *"Probably the biggest company I worked for in the past was called Reach Local. It was in their heyday, but for me that wasn't really a good thing. Territories were basically diminished, and there were so many product lines it was hard to focus, especially when you are working full sales cycle, start to close,"* says Gerrard. *"Also, during the time when search engine marketing was on the rise, so it was hard to distinguish what they were doing on the backend versus the thousand other agencies out there."*

Evaluating the boss

Of course, a great, in-demand product will take you a long way. But, what if you work for a tyrant? What if your boss makes your job a nightmare?

Sigh. We've all been there. And, it's tough.

***"We're all different personality types. You have to determine if you vibe with the person, or these people,"* says Gerrard.**

"Because you're going to be spending a lot of time together. And, sometimes, it just doesn't click."

But, Gerrard says, you have an opportunity during the interview phase to actually interview them and find out what kind of boss you'll be working for.

To do that, there are some of the tell tale signs to look, adds Gerrard.

For example, is this the type of person that talks about how they help the team succeed? Or, is this the type of boss that only talks about numbers and nothing else?

Does this person talk about mentoring team members, and helping them grow and mature as professionals? Or, are they focused on helping themselves?

"I saw a post recently that said to be a good boss you always have to be asking your team what you can do to help. On the flip side, I've worked for people that told us once that he was going to get a lower commission cheque because we missed our goals. I've seen both sides of the coin," says Gerrard.

"So now, I do a lot of training and team building work, even though I still carry a bag. And I wouldn't be able to do that if someone hadn't been that way and taken the time to help me."

Evaluating the culture

In fairness, the type of boss you work for, and the tone they set, has a lot to do with the culture of the company. If they're a kind, giving mentor, that will trickle down to the rest of the team.

But the company, aside from the caring nature of its people, will espouse a set of core values. It's become a somewhat routine trope – few organizations these days don't do this – but they do give you a glimpse into what is important to them.

For Gerrard, there are three values he always looks for: trustworthiness, support, grit.

Does the company say it what it means? Do its employees help each other out when necessary? And, will the company do what it takes to ensure its people have the resources necessary to get the job done? Yes? Well, then, you may have a winner on your hands.

"If you can, go spend a day at the company and see how willing people are to help you there. Go put their values to the test," says Gerrard.

"If they are willing to help you, you'll know *that they truly want a new person that can help get them to the next level."*

For more on Gerrard's job hunting tips and tricks – including his thoughts on evaluating compensation, growth potential, and the founding team – check out his edition of The Predictable Revenue Podcast. heck out his edition of The Predictable Revenue Podcast.

Why Revenue Operations is a Critical Piece to Your Growing Sales Org

PODCAST

If you're in the enviable position of scaling your sales team – and, by extension, your company – it's an understandable urge to just pour gas on your sales org to support that growth.

More sales people means more meetings. More meetings means more opportunities. And, more opportunities means more revenue. Right?

Not so fast.

Yes, scaling your sales team hiring more sales professionals. And, yes, when fully ramped, high-performing salespeople bring in meetings, opportunities and revenue. But, scaling a team brings with it more concerns than just growth – there are operational issues that must be considered during such times as well. You don't want key company processes to fall through the cracks as you scale.

To prevent such mistakes, you need to put a revenue operations person (and system) in place, says growth strategist and sales advisor **Brian Wilson** (Wilson is now an advisor at MOBI, where he is working to design and scale a sales team, along with a revenue operations component).

"As your company grows up and you go up market a bit, you start adding the channel, and customer success and sales development. So, when I think of revenue ops, I think of taking all of those pieces and making sure they are aligned," says Wilson, on a recent edition of The Predictable Revenue Podcast.

"It's not about siloing sales development or marketing operations, for example."

Defining Revenue Operations… And Finding The Right Person For The Gig

As Wilson illustrated above, revenue operations is somewhat of an umbrella term for the processes needed to support an efficient and effective sales organization.

That said, what those processes are will be determined by the needs and goals of each individual company, adds Wilson.

Are you hoping to grow by 4x? Or, are you looking for more modest 5% growth? How ambitious your sales plan is, for example, will determine the influence and the scope of your revenue operations function.

"I would start with asking these questions: what are the goals? What are we trying to achieve? And, then, I would reverse engineer process to that goal," says Wilson.

"Then, I would do a gap analysis – how do operate? What system are we utilizing? Are there Redundancies? Do we have overlaps? Is there any leakage? What are the results of our processes?"

Once you've decided on the scope required for your revenue operations process, it's likely time to bring on someone to handle those responsibilities. Of course, you may already have someone on the team that will assume this role, but most growing teams likely have to bring on a new person for this role.

For smaller teams, adds Wilson, you may be able to get away with having someone handle revenue operations on a part time basis, but for companies with aggressive growth goals, you'll need a full time person.

When searching for the right candidate, Wilson says, he looks for people with advanced analytical skills, as well as people with a strong work ethic. A revenue operations position, after all, requires people to quickly diagnose and fix operational issues.

> "Right from early on, you will want to test how analytical this person is. I'm looking for proactive people, people who know the goals, see gaps and leakage right away and address it," says Wilson.
> *"If you are not seeing those traits early, there could be challenges there."*

Brian Wilson
Advisor at MOBI.

Brian's Work With Mobi

Currently, Brian is working as an advisor to Mobi, an Indianapolis-based mobile device management software company.
In his role there, he's had to design and implement a revenue operations function, which included instilling a culture of ownership around revenue ops, as well ramping up lead gen. Mobi needed to fill the top of the funnel.
And thus far, the result have been terrific. Their revamped lead gen machine **(with the help of Predictable Revenue)** has increased results by 10x, and the culture surrounding revenue operations has been strengthened.

But, adds Wilson, as the team began to add more meetings and opportunities, the need to standardize metrics and reporting downstream became more apparent. For example, the team now needs to better understand metrics such as how many phone calls it takes to get a meeting, and how long after a meeting does an opportunity become revenue.
"There was ad hoc activity in the sales pipeline, needed to standardize processes for sure," says Wilson.

"We needed to track that and understand those inputs fully. It's about standardizing metrics and holding people accountable for the consistency and clarity that come from those metrics."
Revenue operations truly is an interconnected system.

Connecting With the Team

So, as you dive into the world of revenue operations (and, subsequently, begin implementing the function at your company) it's critical that your sales team understand why you're doing so. There will be process changes as a result, and your sales team will need to buy into those changes.
Wilson says he's had to build those bridges throughout his career.
"The key is, when I've come on board, we immediately discussed that we are going to do ramping up lead gen and putting some new process in place as a result. But, we were also very clear about the fact that everyone is going to have do do extra, during the transition. More was going to be asked of everyone," says Wilson, adding that *"But, the will come with benefits. And, we delivered on that.*
When you deliver, it makes it much easier to discuss changes etc."

For more on Brian Wilson's thoughts on revenue operations – including some Salesforce best practices – check out his recent interview on The Predictable Revenue Podcast.

What it really takes to get a successful SDR team off the ground with Aaron Ross

PODCAST

How long should it take to see results from a new outbound sales team?

For many entrepreneurs, business leaders, and executives the answer to that question is often simple: not a second longer than it needs to take (and, hopefully, immediately).

This is an understandable response – new revenue is critical to the growth of any business. But while outbound can be a powerful source of incremental revenue, expecting too much too soon from a new outbound team is a trap businesses fall into, time and time again.Building a successful outbound function, no matter how you slice it, takes time.

In fact, if you're starting from scratch getting an outbound team up and running, and, of course, producing can take between 6 – 12 months.

That's right...6 – 12 months.

"Outbound, like any major initiative, won't work until you give yourself to it. And that can can take a year to get an outbound program up and running," says Aaron, on a recent edition of The Predictable Revenue Podcast.

Aaron Ross.
Int'l Keynote Speaker, Author of "From Impossible To Inevitable" and "Predictable Revenue"
Co-Founder of Predictable Revenue.

"There are some businesses that don't need outbound – some in the consumer space, for instance. And some need to nail their niche before they even look at outbound. But, by and large, most companies need to do outbound, and they need to be prepared to go the distance."

BACK TO CONTENT

Going the distance

Of course, it's easy to say you have to give everything you can when building your new outbound sales team. Any business leader worth their salt should work hard to ensure their company is successful.
Defining what a new outbound sales team needs to be a success, on the other hand, can be more elusive.
The first step to outbound success, says Aaron, is committing to having full-time sales reps working outbound leads. Part-time just won't cut it.

"The magic happens when you get someone in full time. I know I've said this before, but I hear this time and time again," says Aaron. "If you want the magic to happen, you need someone in full time. Everything else is a warm up."

That isn't to say that you can't deploy a member of your sales of management team to explore outbound on a part-time basis, you absolutely can. But that's an experiment – a fact-finding mission, really – and won't produce the results you need to grow your company. Someone doing outbound off the side of their desk isn't enough to get your outbound function up and running.

How do you define up and running, then?

Great question! The sweet spot, staff-wise, for a new outbound team is hiring one manager, and two SDRs. Depending on where your company is based, three new team members in those roles likely represents an investment of about $250,000 (more if you're located in the Bay Area, less in other locales). Then there are investments in prospecting tools such as Outreach or SalesLoft, and a CRM system, if you don't have one already, such as SalesLoft.
Your tech investment, however, represents a fraction of the cost of your new hires. As for the results of your new outbound team, it's safe to say you're up and running is when you are confident that you can make money from it, says Aaron.

That doesn't mean you are making money from outbound yet, but you are seeing positive results along the entire outbound process:

YOUR TEAM IS

- SENDING EMAILS;
- GETTING RESPONSES;
- GETTING POSITIVE RESPONSES;
- HAVING CONVERSATIONS;
- BOOKING MEETINGS FOR AES;
- GENERATING PIPELINE.

To get to the pipeline creation portion of this process, says Aaron, it may about 4 months. Then, depending on your sales cycle, it could take another 6 months before revenue starts to trickle in.

"You may not be seeing revenue right away – you may sell to the government, for instance, and have super long sales cycles – but you believe you will see revenue. The opportunities you are getting are confirmed," adds Aaron.

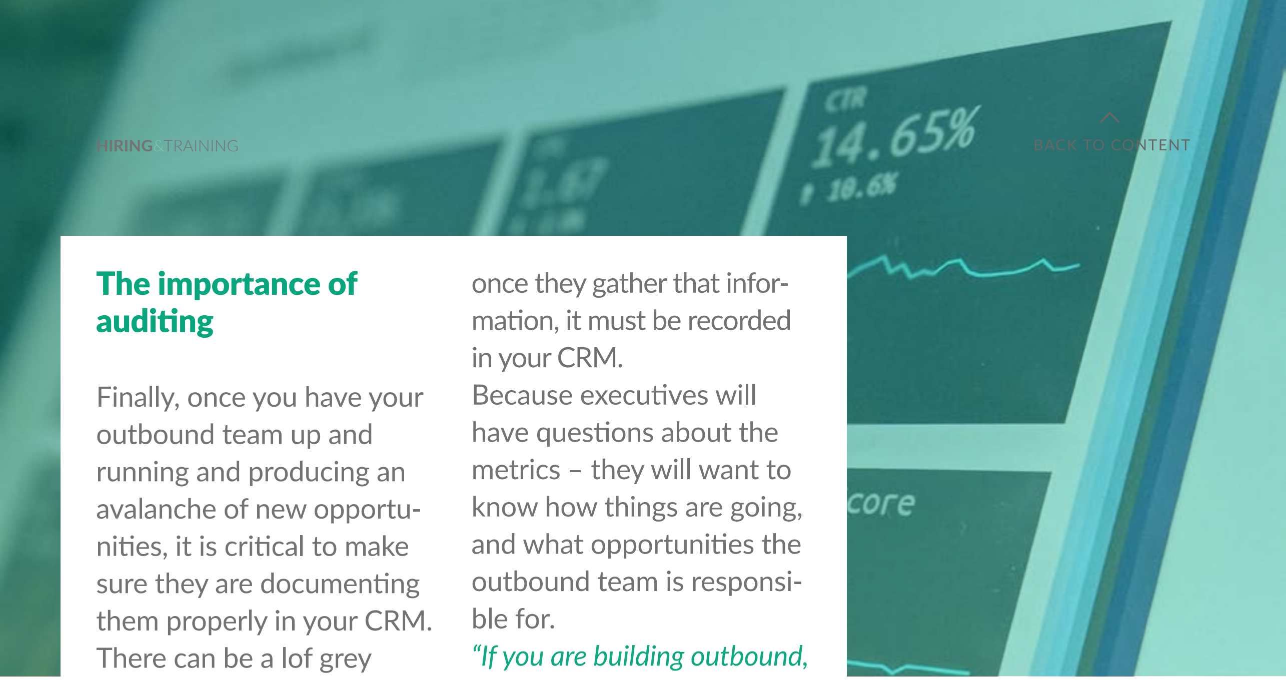
"And if you work your way through this, and make sure what you need to happen is happening at every stage, revenue will happen."

Reactive sales culture

In addition to new business, revenue, and, likely, company growth, building a successful outbound team also has philosophical benefits. So much of today's sales culture, says Aaron, has become reactive in nature. The popularity of inbound leads, and the importance of renewals, has led sales professionals (and companies!) to depend heavily on inbound leads.

But inbound and outbound have entirely different rhythms (that's why it's always best to separate them). And the hunter mentality required for successful outbound teams is infectious. And when you have that kind of rhythm in the office, it can inspire other teams to follow suit.

"I spoke with a 10,000-person, famous company recently. Their sales function has been all about renewals, up until now. It's all been reactive," says Aaron. *"But, not they are establishing outbound. They are doing that for new revenue, yes, but it's also for a mentality change. It creates a more proactive environment. And, as that sales team continues to develop, it will affect the greater company as well."*



The importance of auditing

Finally, once you have your outbound team up and running and producing an avalanche of new opportunities, it is critical to make sure they are documenting them properly in your CRM. There can be a lof grey areas when a company if fielding both inbound and outbound leads. For example, cold inbound leads are often given over to the outbound team to work to see if they can rekindle some interest.

Likewise, outbound teams can prospect to one person in a company, while another person at the same company can sign up and become an inbound lead. In that case, it's tough to know until your reps talk with the lead whether the outbound work was the catalyst for the eventual inbound signup, or whether it was all coincidence. And once they gather that information, it must be recorded in your CRM.
Because executives will have questions about the metrics – they will want to know how things are going, and what opportunities the outbound team is responsible for.
"If you are building outbound, and you aren't the CEO, then it is critical that you can prove what you claim in incremental revenue is actually incremental revenue. It's easy to claim something that was inbound was outbound. And what you don't want is to have two years pass by and the revenue you think generated wasn't the revenue you thought," says Aaron. *Marc Benioff used to do this all the time when I was at Salesforce. He would email me and ask for proof about different opportunities. So be diligent, and make sure you are documenting everything. Executives need to believe in what you're doing, and trust your results because outbound is an investment.*
This is the ultimate test, so when you have the program up and running, make sure you are doing this."

For more Aaron's chat about building an effective outbound machine, [check out the rest of his interview on a recent edition of The Predictable Revenue Podcast.]

How to develop and hire people with a winning mindset: In conversation with Matt Millen, Outreach SVP of Revenue

PODCAST

It's unclear when the trend started, but it's become a prerequisite for all startup / technology / sales jobs to include a provision for "culture fit."

Aside from the product a company builds, or service it offers, organizations go to great lengths to define themselves by the corporate culture they try to instill.
Asking for candidates and, ultimately, new team members to fit a particular company culture is the easy part, however. Building, and growing, that inclusive environment is a bit more tricky.
At best, shepherding company culture is a tightrope walk, with countless important factors constantly at play – empowering your staff, avoiding prescriptive top-down approaches to work, and providing some semblance of work-life balance, just to name a few.

Underpinning all of these different considerations, however, is leadership. It's the tie that binds culture together. It's the north star that gives team members the template for how to fit, and enhance, the company they work for.

But, how do leaders learn to set the right example for their team? How do they ensure the right blueprint is being put in place?

"I interview a lot of people, and this is a question I get a lot. I used to try and put an answer together on the fly, but one night I figured I'd really start thinking about this," says Matt Millen, Senior Vice President of

Matt Millen.
Senior Vice President of Revenue at Outreach

Revenue at Outreach, on a recent edition of The Predictable Revenue Podcast.

"And I decided to think about the leader I want to work for."

Matt's three-part leadership philosophy

The leadership template that Millen ended up drafting, and putting into practice, is comprised of three core planks:

Giving everyone permission to just have fun. *"It's about recognizing how hard people work – and understanding the need to have fun while doing it. I mean, I want to have fun. So, I think people should be able to get a release at work. You just have to do this, and provide space for it to happen."*

Empathy for the team. *"This is an understanding and appreciation for how hard people work in customer-facing roles. This is a hard job. I carried a bag myself during my 31-year career, and I remember what it was like. I never want to have amnesia about my experience and where I came from, so this is an important plank for how you relate to your team."*

Do the right thing. *"This applies to both your team and the customer. When your team knows you have their back, they will perform for you. Not everything is perfect – so you have to step and make sure you do the right thing. And, it's also about entering every deal with the mindset that we are going to make* ***'yes'*** *happen."*

The S.A.M. model

Once a proactive and inclusive leadership style is in place, it can then be applied to, and expanded upon, by any number of company disciplines.

For Millen, of course, that application was developing high-producing, positive, and engaged salespeople. To do so, he's devel-oped a sales philosophy he calls the S.A.M. model (Story, Activity, Mindset).

"I used to drive a race car in the late 80s, and I learned something really quick on the race track: the best car and the best driver doesn't always win. A lot of things have to go right for you to win on a race track, including having a good car and being a good driver," says Millen.

"There were, however, three things I could control:

- HOW MUCH I TRAINED AND PRACTICED
- HOW MUCH I INVESTED IN MY CAR
- HOW MUCH PREPARATION I PUT IN FOR EACH RACE

"In sales, I started learning the same lessons (except there are no medals for second and third place, of course). I could control these elements in sales:

- WHAT COMES OUT OF MY MOUTH, OR MY STORY
- WHAT I DO ALL DAY, OR MY ACTIVITY
- HOW I APPROACH THE DAY, THE OPPORTUNITY, AND THE THINGS THAT HAPPEN, OR MY MINDSET

Millen's S.A.M. model, broken down:

STORY:
"Whether you are an SDR, AE, manager, or customer success professional – we tell stories all day long at work. So, tell your story with compassion. If you can do that, the better chance you have of moving someone, and helping them."

ACTIVITY:
"We understand the activity levels necessary to win today. That's a discussion we've been having for years. And those activities have a quality conversion tied to them. In sales, there is no replacement for daily activity. You have to do the work. And it's great."

MINDSET:
"Mindset is where you win or lose the game. It's your desire, hunger, and commitment to your goals. It's your internal motivation, your drive. It's what gets you in the office earlier than everyone else, and keeps you there later than everyone else. And, it's the accountability you put on yourself. It's owning your job and everything that comes with it."

"It's a success system. When you put these principles to work in your job, think of the zeal you take on tasks with," says Millen.

"You have the right story, the right activity with the right metrics behind it, and the right mindset – you're unstoppable. It's basic, but this works for anyone in a customer facing role."

Finding people with a winning mindset

So, how does this proactive leadership – and it's granular applications – inform on hiring practices?

According to Millen, the two processes can mirror each other: candidates should be able to discuss their story, illustrate they understand the principles and activity levels necessary for the job, and how important a positive mindset is to success.

"Hiring is so critical. But what I have found with salespeople, is that they can sometimes sell themselves better than your product. So I go through their resumes and ask them if they have done all the stuff on their resume. Then, I ask them to give me a pitch," says Millen.

"We need to test for selling when hiring salespeople. If they can pitch me, than they can sell my company's product. But, if they can't pitch me, there is no need to move on."

From there, adds Millen, he looks for resiliency because it's a great indication of whether the candidate can maintain the mindset needed to excel in sales, and juggle what can often be a challenging workload.

If you've determined that your candidate has sales skills, than you must also determine of they have personality to slug it out each and every day.

"We ask our candidates what they think is the most important attribute for an Account Executive is. They often say grit. I agree with them, but then I say, 'well I haven't seen grit.' And I wait to see how they respond," says Millen.

"If they don't respond, they don't have it. If they defend themselves, they have resiliency."

Finally, as a candidate moves through the interview process, Mllen says he, and other sales leaders, make sure to paint an accurate picture of what the daily expectations of the job are. They even make each new hire write a promise note to themselves saying they commit to handling everything that's throw their way.

"it becomes clear what the minimum activity level is for the job throughout the interview process. The emails, calls, hours – what's expected of you, at a minimum, is shared," says Millen.

"So, we have the candidate send a promise note saying they promise to do all of that. So, on their first day, you can print it off, and have it as a great reminder of what you promised."

For more Matt's thoughts about leadership and hiring successful salespeople, **check out the rest of his interview on a recent edition of The Predictable Revenue Podcast.**

Want to learn if outbound is a fit for you?

Talk to one of our Outbound specialists today and they'll do a quick assessment over the phone to help determine if Outbound will work for you.

Start growing faster with outbound sales.

predictablerevenue.com