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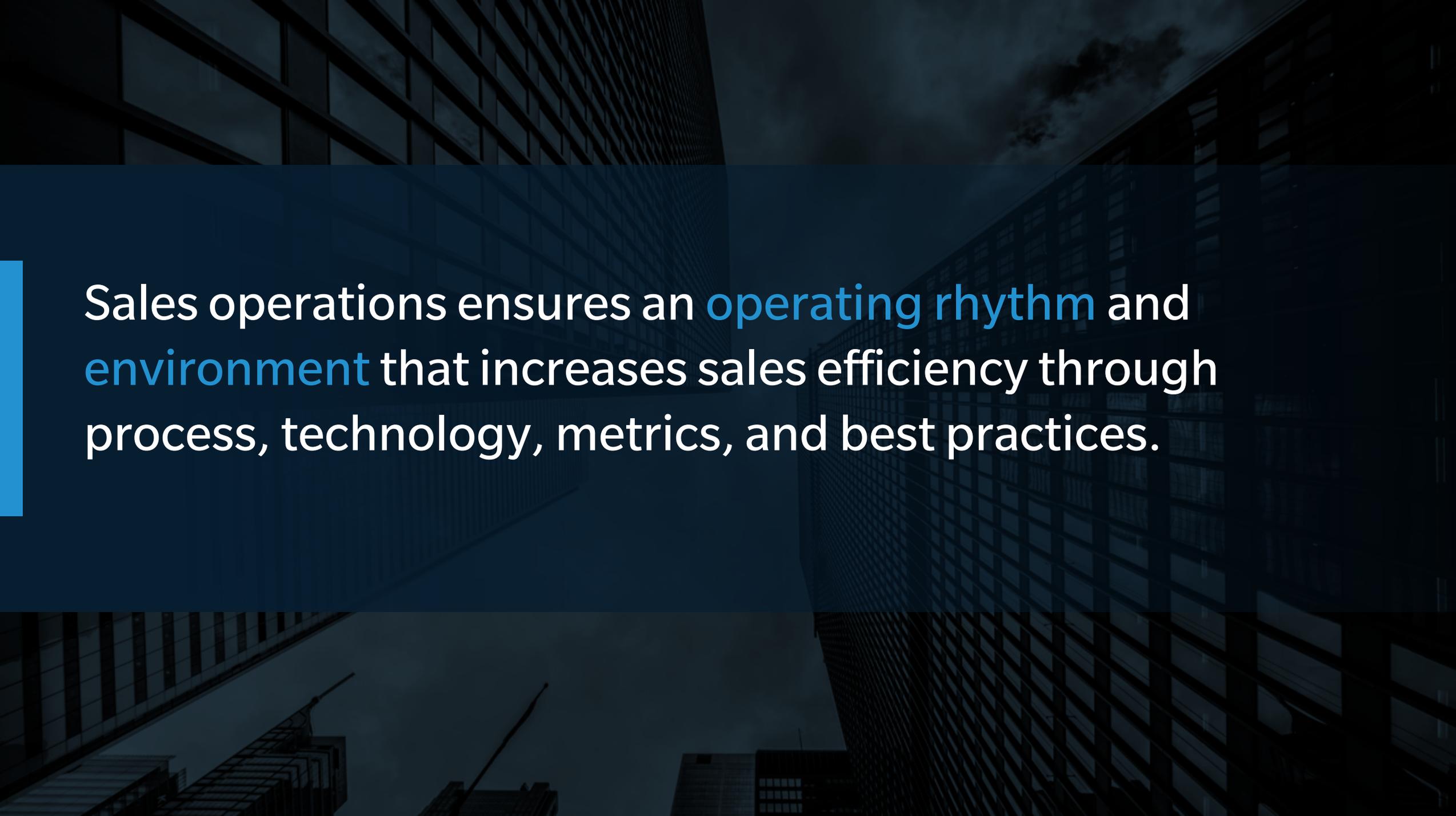
Driven by Insights
Delivered from Experience

Sales Operations Charter and Strategic Review

Sales operations ensures an operating rhythm and environment that increases sales efficiency through process, technology, metrics, and best practices.

What is sales operations?

Sales operations provides transparency and fuels productivity.

→ **Transparency** involves supplying management with the analytics that guide decision-making.

→ **Productivity** involves maximizing selling time and effectiveness across routes to market.

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Sales operations framework

01

Sales Ops Charter

Includes clearly defined guiding principles, mission, and objectives.

02

Data Strategy

The system of record and data required to drive the quickest and best sales decisions.

03

Analytics Strategy

How you measure the business and derive actionable insights.

04

Reporting

Includes the standardized set of key business measures, as well as getting those to the right audience at the right time.

07

Sales Ops Organizational Design

The optimized structure, roles, development plans, and KPIs to execute the charter and other supporting functions.

06

Support

Act as a conduit between sales and other corporate groups to allow the company to be easy to do business with.

05

Systems

The underlying systems and technology roadmap for driving efficiency and effectiveness across the sales organization.

ACME sales operations charter

ACME's global sales operations team executes the sales strategy and drives productivity by focusing on five key business outcomes for the business.

01
Easy to sell for and buy from

Sales ops can implement processes to improve efficiencies for the sales org (selling time) and processes for customers and prospects to consume ACME's solutions.

02
Increase productivity per head

By optimizing routes to market coverage (via org design, territory design, and headcount allocation) and driving efficiencies, sales ops can increase productivity per head.

03
Improve forecast accuracy

Improving business understanding and forecast accuracy is achieved through the implementation of effective forecasting and pipeline processes, along with a strategic approach to driving the sales process.

04
Increase new logo acquisition and cross-sell

By optimizing coverage and territory allocation, and appropriately balancing focus across prospects and existing customers, sales ops can enable the revenue growth that's dictated by the sales strategy.

05
Increase retention

Providing data, implementing processes, and allocating insourced and outsourced resources reduce the cost of retention rates.

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Sales ops charter — easy to sell for and buy from

How Will Sales Ops Support This Initiative?

Data Strategy: Define data required to make sales decisions. Represent the sales team in the master data management function and maintain/clean data from the field, making the data easily available and accessible to the sales team via tools and systems.

Sales Systems: Automate core business processes to remove the administrative burden and increase the productivity of the sales organization via direct and indirect channels.

Reporting and Analytics: Create reports/dashboards that are role-specific to drive visibility and decision-making for the user.

Sales Support: Represent the field within other corporate functional groups to ease the administrative burden. Implement a sales concierge service, which is a combination of self-service and sales ops support to reduce sales drag.

Deal Support: Create a deal desk that reduces quote time and provides clarity to the end customer. In addition, create a review process for big deals that provides the field with support in growing deal size and increasing win rates.

How Will Sales Ops Be Measured?

→ Percentage selling time (improvement)

→ Time to quote (improvement)

→ Data cleanliness (e.g., percentage of records that are duplicates)

→ CRM usage

→ Dashboards and tools/systems

→ On-time reporting and analytics output

Sales ops charter — increase productivity per head

How Will Sales Ops Support This Initiative?

Account Segmentation: Create and maintain the account segmentation process, which determines the accounts that'll be allocated based on potential to spend and propensity to buy ACME's solutions.

Sales Structure And Coverage: Structure the sales organization and determine the accounts to cover by segment, the right sales channels to cover said segments, and the right number of sales resources needed to achieve the plan.

Territory Design: Allocate accounts and create balanced territories by placing the right sales resources in the right territories.

Sales Processes: Implement a sales process that focuses on account (current accounts) and opportunity management (new business) that aligns to both the buyer's journey and best practices of prospecting. Ensure that the process is replicable throughout the organization. In addition, it should be enabled with job aids, tools, content, and systems. Establish a sales concierge service portal.

Forecast And Pipeline Process: Implement a consistent and accurate forecast process that is used throughout the organization based on best practices. In addition, create a pipeline process that focuses on out-quarter (not current) pipeline activity and top-of-funnel actions.

Reporting And Analytics: Create reports/dashboards that are appropriate by role to drive visibility and decision-making for the user.

Quota Setting: Translate the growth goal(s) into sales quotas that reflect the potential of each territory.

Compensation Design: Develop an incentive compensation program that stays within the corporate budget, attracts/retains top talent, and motivates desired behavior.

Sales Enablement: Get the right training, tools, and content in the hands of the sellers to improve their overall effectiveness.

How Will Sales Ops Be Measured?

→ Pipeline coverage (CQ, CQ+1, CQ+3)

→ Pipeline by type, i.e., new logo and up/cross sell

→ Data cleanliness (e.g., percentage of records that are duplicates)

→ Pipeline average deal size

→ Sales process adoption

→ Bookings/head
- New bookings
- Up/cross-sell
- Retention/renewals
- Services

Sales ops charter — forecast accuracy

How Will Sales Ops Support This Initiative?

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Reporting And Analytics: Create reports/dashboards that are appropriate by role to drive visibility and decision-making for the user.

See forecast and pipeline process slides in the Appendix for additional detail.

How Will Sales Ops Be Measured?

→ Sales process adoption

→ Forecast accuracy

→ Pipeline coverage (CQ, CQ+1, CQ+3)

→ Pipeline growth in line with plan

→ New forecast and pipeline process adoption

Sales ops charter — increase new logo acquisition and cross-sell

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Compensation Design: Develop an incentive compensation program that stays within the corporate budget, attracts/retains top talent, and motivates desired behavior.

How Will Sales Ops Be Measured?

→ New business pipeline coverage CQ, CQ+1, CQ+3

→ Pipeline by type – new logo

→ New business pipeline average deal size – annual contract value and total contract value

→ New business bookings/head

→ New logo acquisition compared to per year and plan

Sales ops charter — increase retention

How Will Sales Ops Support This Initiative?

Retention Intelligence: Create a customer 360 view into the customer base to effectively provide sales resources with intelligence on retention dates and amounts. In addition, create a process to automate notifications and touchpoints for customer lifecycle management.

Sales Systems: Automate core business processes to remove the administrative burden and increase the productivity of the sales organization via direct and indirect channels.

Service Source Liaison: Develop service-level agreements and processes with partners, ensuring they act as an effective sales channel; including but not limited to systems integration, lead management workflows, and sales process handoffs.

Account Segmentation: Create and maintain the account segmentation process, which determines the accounts that'll be allocated based on potential to spend and propensity to buy ACME's solutions.

Sales Structure And Coverage: Structure the sales organization and determine what accounts to cover by segment and the right sales channels to cover said segments. In addition, determine the right number of sales resources needed to achieve the bookings plan.

Territory Design: Allocate accounts and create balanced territories by placing the right sales resources in the right territories.

How Will Sales Ops Be Measured?
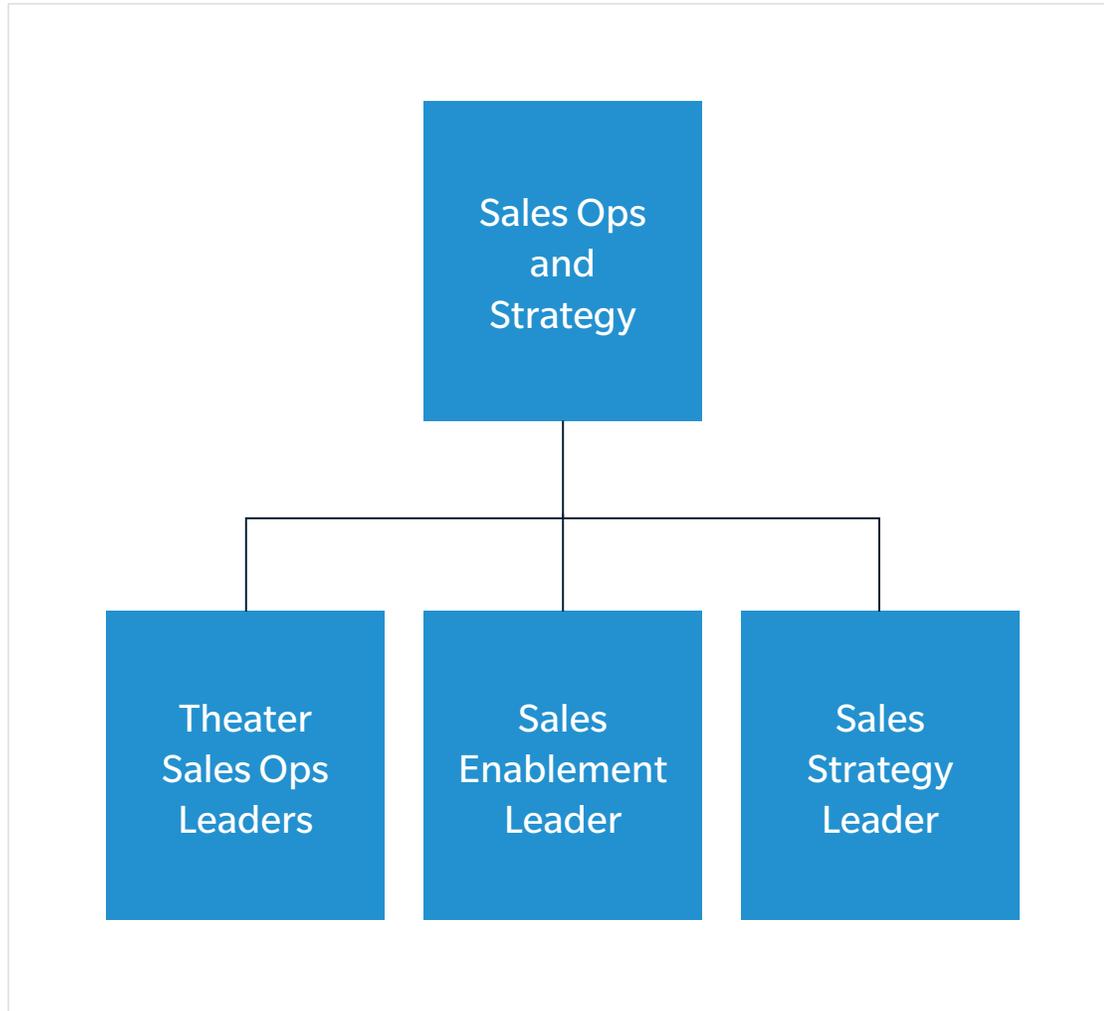
→ Retention rates by customers

→ Retention rates by dollars

→ Salesforce.com usage

Sales Operations Structure

A global organization will drive efficiency and productivity for the entire sales organization

Sales Ops and Strategy
- Theater Sales Ops Leaders
- Sales Enablement Leader
- Sales Strategy Leader

Sales Operation And Strategy

Sales Planning	Engagement	Sales Support
Markets	Prospecting	Sales Operations
Accounts	Sales Process	Sales Enablement
Buyers	Org Design	Systems
	People Plan	Back-Office Support
	Channel Optimization	
	Territory Alignment	
	Quota Setting	
	Compensation Planning	

Key ↓

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A global organization will drive efficiency and productivity for the entire sales organization

Sales Operations and Strategy

- **Theater Sales Ops Leads**
  - Field Ops – Territory Management
    - Local Management of Sales Ops and Enablement Initiatives
    - Liaison to the field
- **Sales Enablement Leader**
  - Coaches
  - Content Design
  - Sales Trainers
- **Sales Systems and Analytics**
  - CRM
  - Sales Reporting and Analytics
  - Sales Data Management
- **Renewal Operations**
- **Sales Strategy and PMO**
  - Account Segmentation
  - GTM Motions
  - Sales Programs (Win/Loss, G2K, Global Accounts, etc.)
- **Sales Compensation**
  - Comp Design
- **New Logo Programs**

Forecast and Pipeline Process

Goal of the pipeline and forecast process

Pipeline	Forecast

Pipeline

→ Drive visibility and accountability to out-quarter (not current) activity.

→ Increase pipeline by injecting marketing, product, and technology personnel into top-of-funnel motions.

Forecast

→ Drive adherence to the sales process.

→ Drive discipline and accountability to in-quarter sales motions.

→ Give an accurate number to the executive team.

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Forecast call overview

Forecast call cadence should be every two weeks, and the last month of the quarter should involve weekly check-ins.

	Theater VP meetings	Theater RD meetings
Meeting leader	Theater sales ops. leader and VPs	Regional directors
Meeting attendees	Regional directors	Sellers and channel managers

What	How	Why
Current commit, upside, and non-forecastable	Total rollup and individual opportunities that are clustered in each of the forecast categories	This will be the foundation for providing a forecast to the business.
Gap to quota	• The delta/shortfall of commit opportunities measured in dollars, as compared to quota/plan • Individual and total opportunities in upside that bridge the gap to quota/plan	• Visibility into the total commit and upside deals allow for a strategy to be formed on what needs to be done to make the number. • SMART next steps will need to captured, documented, and brought to the next call for accountability.
Risks in commit	Dollars at risk to deals in commit and those that could cause the region to fall short of quota/plan	If there is risk in the forecast, then specific actions should be captured to mitigate the risk (see next step).
Specific, measurable, achievable, relevant, and time-bound (SMART) next steps	• Managers should offer suggestions and next steps to help sales reps progress deals. • Sales manager and sales ops capture SMART next steps to ensure deal progression.	• The forecast calls should not only be about reporting activity and numbers. They should also drive actions to ensure plan is hit or exceeded. • Each SMART next step from the previous call should be addressed before the next one is added. • At the end of the call, a recap of SMART next steps should be given by the sales ops team to ensure everything was captured and understood.

Pipeline call overview

Pipeline call cadence should involve weeks 1, 5, and 9 of every quarter.			
Meeting leader	Global sales leader	Sales operations leader	Sales finance leader
Meeting attendees	Theater leaders	Marketing management	Channel management

What	How	Why
Pipeline change from previous call	• Rolling four-quarter pipeline (includes current quarter) • Amount ($) change (i.e., new and lost opportunities, pushed and closed deals, and reduced and increased dollars in opportunities) • Change in number of opportunities (new – [closed + lost])	• This will provide visibility and accountability into out quarter activity • The management team should be managing the pipeline growth in both dollars and number of opportunities to ensure there is a healthy pipeline mix
Opportunities created	Number and amount ($) increase for net-new logos and existing customers along with average opportunity size	• The sales teams should be adding opportunities in both existing customers and net-new logos. • Average opportunity size should start to gradually increase over time. This metric will be a leading indicator for future deal sizes.
Pipeline by stage	• Amount ($) in each stage of the sales funnel, or buying stages per quarter • Number of opportunities in each stage of the sales funnel or buying stages per quarter	This will provide visibility into deal progression and sales process adoption.
Pipeline multiplier (i.e., pipeline-to-quota ratio)	Pipeline compared to quota/plan	Pipeline should maintain a minimum of the inverse of close rate. Meaning, if the opportunity close rate is 20%, the minimum multiplier should be five times the quota/plan. A drop in the multiplier will be a leading indicator to bookings shortfall.
Marketing and sales prospecting efforts	• Past and upcoming events/efforts • Number of new qualified leads passed to sales since last call and comparison to historical run rate	This activity will identify gaps in execution and capture best practices from the field.

Pipeline and forecast stages

We recommend disconnecting forecast stages from sales stages.	→ **Sales stages:** Reflect where the buyer is in the sales process. → **Forecast stages:** Reflect chances of winning the decision based on the buyer preference and timeline.	**Key Questions To Ask** • Why buy anything? • Why buy now? • Why buy from ACME?

Forecast Category	Definition
Non-forecastable	Project/opportunities are typically early in the buying process. The problem and solution are being developed. The engagement team is getting to know the entire buying decision team (BDT). The deals are non-forecastable and usually not closed within the current quarter. Budget discussion has not occurred. *This will provide an answer to one of the questions posed in the Why category on the previous slides.*
Upside	Project/opportunity is typically in the mid-stage buying process. Deal is competitive in nature and outcome is unclear. Funding is still ambiguous and needs further justification. For example, internal business case is not finished and approved. There is major risk in committing the deal. *This will provide answers to two of the questions posed in Why category on the previous slides.*
Commit	Customer has committed to the project/opportunity, and either the funding has been defined or the path to funding is clear. Project timelines are clear and understood. Decision-makers — i.e., the BDT — and decision process are understood. Risk is understood and manageable through risk migration strategies. Decision will be made within 30 days. *This will provide answers to three of the questions posed in the Why category on the previous slides.*

Quick Wins

Recommended actions

Action	Why?
Move theater sales ops under a global sales ops function and create centers of excellence to leverage the field ops resources.	Doing this will drive efficiency and consistency throughout the organization, allowing you to effectively execute on global initiatives in a cost-effective manner.
Operationalize a new forecast and pipeline format in global theaters.	Currently, there is little visibility to out-quarter pipeline because there is no process/accountability on the sales team to capture this. By implementing the process, we will drive sales methodology/process adoption and provide visibility for both out-quarter pipeline and current quarter activity.
Clearly delineate field and central reporting.	The field sales ops teams are typically asked to provide ad hoc reporting, which results in a reactive approach. If a set of reports and dashboards can be developed centrally while being augmented in the field, the team can focus on other higher valued activities.
Centralize the data cleanup process.	The field sales ops team is spending an inordinate amount of time cleaning up bad data, and this doesn't scale. By centralizing the function, the field team can be more proactive in territory/whitespace analysis and support.
Reframe reporting/dashboards/KPIs to emphasize the importance of new business along with behavioral and leading indicators.	Most of the current reporting metrics do not emphasize new business. From a valuation perspective, a dollar of new business bookings is more valuable than services (as an example). By shining a light on new business from a reporting perspective, we can effectively hold the team more accountable to the growth levers that are valuable to the organization.
Move the sales strategy team under the sales ops function.	The functions performed on this team (programs, compensation, etc.) typically reside under the sales ops umbrella. By putting this under sales ops, synergies can be had, which would reduce cost within the function.
Move quote operations to finance.	The quote operations team is performing a multitude of tasks beyond quote support, to include fulfillment. By moving this function into finance, the sales ops team can focus their efforts on making the sales team more efficient.

Potential KPIs

Having defined key performance indicators (KPIs) will improve sales performance and predictability by tracking forward-looking behavioral/leading indicator metrics.

Short-term results   **Long-term results**

Behavioral Indicators

1. Number of buyer persona interactions
2. Penetration to the entire BDT, e.g., not single threaded to a single persona
3. New pipeline generated by type, e.g., new logo, upsell and cross sell
4. New pipeline generated by product family
5. New pipeline generated by source, e.g., marketing, partner, sales
6. Opportunities with marketing captured leads (MCLs), marketing qualified leads (MQLs), and sales qualified leads (SQLs)

Leading Indicators

1. Pipeline coverage, current quarter (CQ), CQ+1, CQ+3
2. Pipeline by type, e.g., new logo, upsell and cross sell
3. Pipeline by product
4. Pipeline by source, e.g., marketing, partner pull, sales
5. Pipeline exceptions, e.g., stuck, old, big deals
6. Pipeline average deal size
7. Forecast by stage, e.g., best case, upside, committed, won
8. At-risk retention/renewals
9. Gap to annual quota

Lagging Indicators

1. Bookings by type, e.g., new logo, upsell and cross sell
2. Bookings by product
3. Bookings by source, e.g., marketing, partner pull, sales
4. Customers, e.g., total, new, lost, growing, at risk
5. Average deal size
6. Customer and dollar churn
7. Customer acquisition cost (CAC)
8. Customer lifetime value (CLTV)
9. Productivity per Rep, by bookings type
10. Cost per rep
11. Win/loss/no decision rate
12. Discount rate

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Appendix

Pipeline inspection

Overall view of the pipeline

The goal is to ensure the pipeline is a healthy size/shape

- Total size of the pipeline (e.g., four times the annual quota)
- Total shape of the pipeline by sales stage and close date (e.g., four times the quarterly quota, distributed across appropriate stages for CQ+1- CQ+4)

Inspection of exception deals

The goal is to ensure exception pipeline deals are not giving a false view of the overall pipeline

- Very large deals (over $1M)
- Very old deals (over 1 year old)
- Deals stuck in a given stage (over 90 days)
- Deals with no activity (over 30 days)
- Deals with past due dates (close date prior to today)

Ongoing health of the pipeline

Set an action plan to stay on track to have healthy out-quarter pipeline (CQ+1, CQ+2, etc.)

- New pipeline generated in last 30 days (by product/region/source)
- Pipeline lost in the last 30 days (by final destination of win/loss/no decision)
- Gap to plan for CQ+1 - CQ+4 pipeline (based on historical close rates and average sales price, determine gap in the number of deals for each quarter)

Forecast inspection

Deal inspection

What is the status of this deal?

- What is the compelling event?
- Is the sales stage correct based on the customer behavior?
- Is the forecast stage correct based on answers to the three Why questions?
- When was the last customer-facing activity?
- When was the last update to the close date and/or close amount?

Win-plan inspection

What is our plan to win?

- What's our win plan?
- What are ACME's next steps?
- What are the customer's next steps?

Trend inspection

What trends are emerging in the forecast?

- Which forecasted deals have moved into another category (i.e., commit to upside)?
- What deals are pushing (every deal must either be won, lost, have no decision, or get pushed, but they should never disappear)?
- What are the new forecasted opportunities, and why are they real now?
- Is the forecast healthy in terms of distribution (i.e., it isn't determined by one or two very large deals)?
- Is the forecast healthy in terms of product mix (i.e., it isn't made up of too much of one product)?
- For those territories with a gap, what are we doing to generate out-quarter pipeline?

Functional support

Data Strategy	Analytics	Reporting	Systems	Sales Support
Ongoing data structure, storage, refresh, hygiene, and quality control	• KPIs • Pipeline • Forecast • Sales efficiency • Big deals • Quarterly business review data • Systems/tools effectiveness	• KPIs • Pipeline forecasts • Dashboards for all levels • Ad hoc and marketing reporting	• Measurement and management of customer relationship management (CRM) use and accuracy • Management of configure, price, quote (CPQ) systems and processes	Measurement and management of sales support functions owned by the group

Sales operations best practices

15 Appointments a Day

300 Emails a Day

35 mobile Calls a Day

20 Sales Reps Pursuing Simultaneously

Working 70 Hours a Week

30 Text Messages a Day

15 Desk Calls a Day

500 Advertising Impressions a Day

WEBSITE

RESEARCH

SOCIAL MEDIA

CONTENT MARKETING

→ Complexity and noise are increasing exponentially

→ Increasing buyer sophistication and expectations

→ Art -> Science

→ Increasing cost of sales demands more efficiency

Sales Operations Framework
Sales ops charter includes a clear mission with prioritized set of key objectives and deliverables.
Data strategy includes data gap analysis and current state assessment, along with the identification of systems of record, improved data quality through hygiene inspection, better forecast accuracy, and improved win rates.
Analytic strategy includes faster and better decisions through specific KPIs, business review cadence, and pipeline/forecast processes.
Reporting strategy includes having a master set of dashboards and reports and a socialized and adopted single source of truth.
Systems strategy includes using automation to increase selling time and having an action plan for getting the most out of current systems and a prioritized roadmap for evolving the tool set for more efficiency, giving time back to the sales team.
Sales support strategy includes making it easier to do business internally and across the organization with other functions such as contracts, legal, pricing, and finance, as well as managing access to the sales team and creating a process for their engagement.
Sales ops organizational design includes creating an org chart, roles and responsibilities, and performance metrics. This also involves having the headcount required to execute the charter and sales strategy.

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A global organization will drive efficiency and productivity for the entire sales organization

Sales Operation And Strategy		
Sales Planning	**Engagement**	**Sales Support**
Markets	Prospecting	Sales Operations
Accounts	Sales Process	Sales Enablement
Buyers	Org Design	Systems
	People Plan	Back-Office Support
	Channel Optimization	
	Territory Alignment	
	Quota Setting	
	Compensation Planning	

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Example sales operations leadership structure with role descriptions

Sales Ops and Enablement

Sales Analytics and Reporting

Is responsible for the design and creation of reports, predictive models, and thorough analysis designed to provide actionable intelligence

SFDC Systems

- Are accountable for the effective and efficient use of SFDC
- Responsible for the design of the sales database and systems to increase field sales effectiveness
- Maintain data quality process to ensure accurate information

Theater Leads

- Are responsible for providing day-to-day support and oversight to theater sales leaders
- Act as the voice of sales with all internal functions (i.e., product, marketing, HR, legal, etc.)
- Own sales process adoption

Sales Enablement

- Owns new hire onboarding and sales leader enablement
- Is responsible for the buyer's process map and persona training
- Works closely with marketing on personas, positioning and collateral review

Example sales operations structure with detailed responsibilities by area

Sales Ops and Enablement

- Salesforce effectiveness strategy owner
- Data sales discipline and compliance measurements
- Timely and consistent execution of growth initiatives
- Flawless organizational collaboration and leverage
- Sales forecasting accuracy and productivity metric improvements

Sales Analytics and Reporting

- National Ops reviews
- Monthly operating report/QBR templates
- Sales performance reporting
- Sales commissions analysis
- Sales analysis
- Monthly forecasting
- Annual plan
- Sales module analysis
- Sales quota planning/analysis
- Sales budget analysis and mgmt.
- Channel commission mgmt.
- Product pricing analysis
- Predictive models and statistical analysis
- Other sales analysis tasks
- Sales forecasting analysis

SFDC Systems

- Data/sales systems strategy and execution
- Liaison with FTR IT
- SFDC strategy
- SFDC mgmt. and admin.
- Data migration
- SFDC systems maintenance
- Data cleansing
- SFDC sustainability/adoption
- SFDC dashboard mgmt. and admin
- SFDC reporting and analysis

Theater Leads

- All sales communications - field
- Sales commission admin
- Sales module alignment/mgmt.
- Sales process design and mgmt.
- Lead generation mgmt.
- Sales policies and procedures
- Liaison with other FTR functions (i.e., marketing, product, legal)
- Retention and growth programs
- Productivity tool mgmt.
- Rewards, recognition and sales commission admin.
- Sales forecasting mgmt.

Sales Enablement

- Sales enablement strategy and execution
- New hire onboarding
- Learning and enablement development and admin.
- Regional sales manager coaching and development
- Field sales audits
- Field sales mgmt. productivity
- Region sales enablement plans

Creating the sales operations charter

With the sales ops charter, it's pivotal to answer how salespeople will be measured and how their impact on initiatives and the charter itself will be quantified.

Behavioral Metrics

- CRM adoption
- Customer product usage and renewal touchpoints
- Prospecting activity
- Account planning, tool adoption, and manager effectiveness
- Process adoption
- Process adoption and process simplification

Leading Metrics

- Pipeline coverage
- Proactive approach (contact time and renewal timeliness
- Pipeline and lead quality/quantity
- Time to close, selling time, ramp to productivity, and pipeline ratio
- Increased deal size, increased selling time, decreased time-to-close, and decreased quote-to-order time
- Wallet share, sales cycle length, Net Promoter Score, cross-sell, retention

Lagging Metrics

- Forecast accuracy: pipeline quality metrics, i.e., time in stage, etc.
- Higher renewal rate/lower churn rate
- New logo acquisition
- Increase productivity per head
- Easy to sell for
- Easy to buy from

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