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A SALES OPS LEADER'S FIRST 90 DAYS

How to Accelerate Your Success in a New Role

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Chapter 1

The Rise of Sales Operations – Why Has Interest Increased?

When Dave Fulham stepped into his new role as Senior Director of Global Sales Operations and Enablement at JDSU, his first priority was to develop a deep understanding of the JDSU sales organization. Dave spent several weeks interviewing key stakeholders to understand the business from their perspective. He then commissioned an assessment of the sales team's go-to-market strategy, processes, tools, and key sales metrics – from Symmetrics Group as an objective third party.

This proactive, fact-based assessment helped build buy-in from sales leadership and solidified the priorities for his first 90 days in the new role. For the next eight years, he and his sales operations team successfully navigated multiple acquisitions, a divestiture, and ultimately JDSU's rebranding to VIAVI Solutions. By partnering with top sales leaders, they also developed a sophisticated, data-driven approach to pipeline management and forecasting, which is a key component to how the company is managed. Today, Dave is the VP of Sales Operations for the $1B+ organization.

Symmetrics Group increasingly receives inquiries from new sales operations leaders on how best to transition into this role. Separately, we've noticed an uptick in the sheer number of sales operations leaders and with it, a rise in the amount of influence and decision authority granted to them by the C-suite.

What's behind the elevated focus on sales operations? We see five reasons:

1. Sales Discipline has Finally Become a Must-Have, Not a Nice-to-Have

Corporate leaders increasingly recognize that sales growth doesn't magically happen with a talented sales team alone. The more a company can improve sales productivity, eliminate friction in the sales process, and drive sustainable and scalable growth, the better. But doing that absolutely requires support. We've heard many metaphors for sales operations – the pit crew for race car drivers, the coxswain on the crew team, the line chef in the 5-star restaurant. All point to the importance of building strong fundamental processes and developing robust discipline so that sales organizations can succeed.

2. The Data and Analytics Revolution

A study by McKinsey notes that "47% of business leaders say data and analytics have significantly or fundamentally changed the nature of competition in their industries."[1] Sellers and sales leader must leverage analytics to stay competitive, but many of our clients are drowning in large amounts of data that lack enough accuracy or completeness to make it useful. Since we particularly find this in clients with multiple CRM instances, we think this is another driver of the increased focus on sales operations.

3. A Proliferation of Sales and Marketing Technologies

According to Seismic, there are now 7,000+ applications available to support sales and marketing functions. 27,000! Sales leaders simply don't have time to unravel the myriad options available to them. They need consulting partners or an internal organization to help them manage that task.

4. B2B Selling is Increasingly Virtual

For most companies, 2020's global pandemic was a massive work-from-home shock to the system. We don't expect the percentage of sellers working remotely to decrease drastically, even after the pandemic. A Forbes article about the future state of remote works says "by 2025, an estimated 70% of the workforce will be working remotely at least five days a month."

The pandemic simply accelerated a trend in virtual selling that was already underway. But it also highlights the need for better infrastructure and virtual tools so that sellers can be effective. See our blog, 4 R's of Building Trust and Customer Relationships in a Virtual Environment. Companies must continue investing in virtual collaboration tools as well as tools for accurate forecasting and pipeline management so that sales leaders always have visibility into seller performance, regardless of whether they're working remotely or not.

5. The Scope of Sales Operations Has Expanded Far Beyond Enablement

It became clear as we interviewed leaders for this eBook that the scope of the sales operations function itself varies in nearly every organization. Quite often, sales ops leaders have a "side job," such as managing the pipeline or forecasting, owning the pricing strategy, managing the customer service arm of the business, or even owning the L&D function.

This expansion of traditional sales ops responsibilities seems to essentially cover just about any activity that is adjacent to sales. Gartner finds that "today, 57% of sales operations functions support marketing departments, 38% support product, and 35% support finance."[4] That's a lot of hats. It also explains the uptick in inquiries to us from leaders stepping into the sales operations function. These roles aren't just about enablement anymore.

Are Sales Strategy and Organizational Structure Really the Sales Ops Leader's Responsibility?

In some cases, yes, in others, not so much. This often depends on the maturity and size of the organization, as well as how closely the sales ops leader works with the internal strategy team. In a complex sales organization (i.e., multiple business units, multiple routes to market, matrixed or siloed sales teams due to M&A activity), the sales ops leader may support the chief revenue officer or chief strategy officer in making tough decisions about go-to-market strategy, channel strategy, sales resource optimization, etc.

When multiple products, services or business units are involved, sales and sales ops leaders must orchestrate how all sales resources (including inside sales, sales engineers, channel partners, etc.) can work seamlessly to make the company easy to buy from.

For more on sales strategy and organizational structure, see our Guide to Sales Resource Optimization.

If It Isn't Just About Enablement, What Is It?

In its purest form, sales operations is the function that manages the people, process, and technology needs of a high-performing sales organization. Sales ops helps sales VPs and the C-suite keep their "eyes on the prize," which is revenue. Most vitally, this function includes:

- **Defining the metrics for sales org success**
- **Supporting healthy pipeline development**
- **Continually improving seller and sales leader capabilities**
- **Other essential non-selling activities that can be as varied as managing CRM, setting sales strategy, defining territories, suggesting compensation structures, etc.**

But make no mistake. A high-functioning sales operations team is the glue that binds the sales organization together and ensures it also gets optimal support from sales-adjacent business functions like finance, IT, marketing, product management, HR, and legal.

We should note, however, that in many companies the function of traditional sales operations is expanding and transforming to encompass the much larger role of revenue operations. Leaders of this expanded function must manage all stages of the customer journey including customer-facing activities that are both above and below the sales funnel, in addition to supporting the health of the sales funnel itself (see Figure 1).

The responsibility of attracting prospects through high-quality lead generation, in addition to delighting customers post-sale or post-implementation, now falls into revenue operations. That means leaders stepping into this role must be incredibly intentional about cultivating relationships with their counterparts in sales-adjacent business functions. Failure to do so increases the odds these functions will not be aligned enough with sales to help them drive revenue. And that affects the success of the entire enterprise.

Our goal with this eBook is to help new leaders in either traditional sales operations or revenue operations roles begin improving the effectiveness of the sales organizations they support – within their first 90 days on the job.

Is it "Sales Enablement" or "Sales Operations?

Rebecca Muse-Orlinoff, Head of Distribution Enablement at asset management firm, Harbor Capital Advisors, Inc., offered one of the best explanations about the difference between "enablement" and "operations," saying "sales operations" is typically focused on fixing internal barriers to improve efficiency while "sales enablement" is more focused on improving customer-facing skills or assets that drive sales effectiveness.

Chapter 2

Before Day 1: Assess Your Fit with the Organization Before Accepting the Job

Having discussed trends, and with the assumption we'll be sticking with the term "sales operations," let's dig into the first 90 days of a new leader by starting before they even commit to taking the role.

In the interview stage, it's important to develop a level of transparency about the position you're taking and the skills you're bringing to it. We asked sales ops leaders how best to do that and not surprisingly most said, "ask the right questions before you take the job." Here are some of our favorite recommendations for setting a solid foundation for your new role.

When Aarti Kumar took on her role as VP of Sales Operations at ChargePoint, the largest network of electric vehicle (EV) charging stations in North America and Europe, the company had a lofty goal of going public in 1. years. When she was approached about the role, Aarti was not shy about telling her future employer what resources she would need to help the company achieve that goal. Her advice to those beginning the interview process is to be forthright in saying, 'this is what I need, can you support me?" Aarti recommends defining the ground rules upfront with the sales org and senior leadership, which sets an immediate tone of "you give me what I need and together we win." (The company did in fact go public in 1. years.)

Sam Watkins, experienced sales enablement leader and now Vice President of Sales Renewals for Renaissance Learning, advises sales ops leaders to be sure to understand the situation they're walking into. Sam says you should ask one simple question: "What's the biggest barrier to
my success at this organization?" Throw that question out and just listen to what they say and, more importantly, to what they do not say. Sam cautioned that "sales operations initiatives can be difficult to drive when the tail is wagging the dog and not the other way around."

Get a Deep Understanding of the Role

Before taking a new role, sales ops leaders should research their new company's strategy, market position, business and product lines, financial performance, executive officers, geographic structure, and any recent changes to the company or other major news.

In addition, new leaders must build a full understanding of the scope of their responsibilities. You need to ask about the composition of the sales organization and sales ops team.

You should be briefed on any high profile, in-flight projects, as well as the sales team's performance. And you should obtain any available documentation on existing sales processes, applications, reporting tools, etc.

If possible, collect org charts or get a basic understanding of key sales decision makers, stakeholders, and your counterparts leading any sales-adjacent functions. Consider proactively requesting an informational interview with some of these stakeholders, as well.

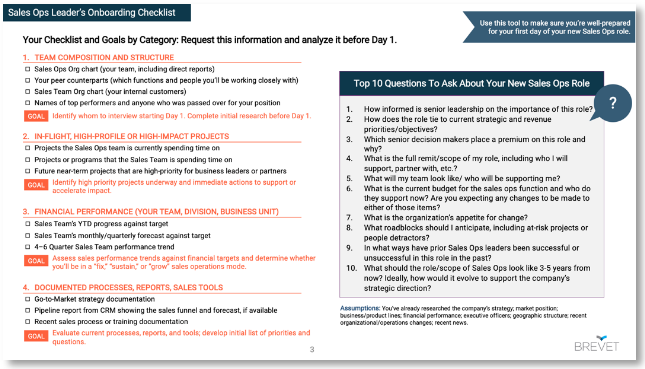
If politically practical, reach out to your predecessor to gain any additional insight. The sharper the picture of both the opportunities and barriers to success, the better prepared you'll be in your first 90 days and beyond.

To help with this, we've developed a list of questions to ask:

1. How informed is senior leadership on the importance of this role?
2. How does the role tie to current strategic and revenue priorities/objectives?
3. Which senior decision makers place a premium on this role and why?
4. What is the full remit/scope of my role including who I will support, partner with, etc.?
5. What will my team look like/ who will be supporting me?
6. What is the current budget for the sales ops function and who do they support now? Are you expecting any changes to be made to either of those items?
7. What is the organization's appetite for change?
8. What roadblocks should I anticipate, including at-risk projects or people detractors?
9. In what ways have prior Sales Ops leaders been successful or unsuccessful in this role in the past?
10. What should the role/scope of Sales Ops look like 3-5 years from now? Ideally, how would it evolve to support the company's strategic direction?

These questions matter because they give you information about your access to budget, political buy-in, and receptivity to future change by sales and sales-adjacent departments. The earlier you can find answers to these questions, the better!

You can refer to this list of questions in addition to other recommendations on what information to collect and analyze before day 1 in the Sales Ops Leader's Onboarding Checklist.



Sales Ops Leader's Onboarding Checklist

Use this tool to make sure you're well-prepared for your first day of your new Sales Ops role.

Your Checklist and Goals by Category: Request this information and analyze it before Day 1.

1. TEAM COMPOSITION AND STRUCTURE
- ☐ Sales Ops Org chart (your team, including direct reports)
- ☐ Your peer counterparts (which functions and people you'll be working closely with)
- ☐ Sales Team Org chart (your internal customers)
- ☐ Names of top performers and anyone who was passed over for your position

GOAL Identify whom to interview starting Day 1. Complete initial research before Day 1.

2. IN-FLIGHT, HIGH-PROFILE OR HIGH-IMPACT PROJECTS
- ☐ Projects the Sales Ops team is currently spending time on
- ☐ Projects or programs that the Sales Team is spending time on
- ☐ Future near-term projects that are high-priority for business leaders or partners

GOAL Identify high priority projects underway and immediate actions to support or accelerate impact.

3. FINANCIAL PERFORMANCE (YOUR TEAM, DIVISION, BUSINESS UNIT)
- ☐ Sales Team's YTD progress against target
- ☐ Sales Team's monthly/quarterly forecast against target
- ☐ 4–6 Quarter Sales Team performance trend

GOAL Assess sales performance trends against financial targets and determine whether you'll be in a "fix," "sustain," or "grow" sales operations mode.

4. DOCUMENTED PROCESSES, REPORTS, SALES TOOLS
- ☐ Go-to-Market strategy documentation
- ☐ Pipeline report from CRM showing the sales funnel and forecast, if available
- ☐ Recent sales process or training documentation

GOAL Evaluate current processes, reports, and tools; develop initial list of priorities and questions.

Top 10 Questions To Ask About Your New Sales Ops Role

1. How informed is senior leadership on the importance of this role?
2. How does the role tie to current strategic and revenue priorities/objectives?
3. Which senior decision makers place a premium on this role and why?
4. What is the full remit/scope of my role, including who I will support, partner with, etc.?
5. What will my team look like/ who will be supporting me?
6. What is the current budget for the sales ops function and who do they support now? Are you expecting any changes to be made to either of those items?
7. What is the organization's appetite for change?
8. What roadblocks should I anticipate, including at-risk projects or people detractors?
9. In what ways have prior Sales Ops leaders been successful or unsuccessful in this role in the past?
10. What should the role/scope of Sales Ops look like 3-5 years from now? Ideally, how would it evolve to support the company's strategic direction?

Assumptions: You've already researched the company's strategy; market position; business/product lines; financial performance; executive officers; geographic structure; recent organizational/operations changes; recent news.

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Days 1 Through 30: Meet Your New Organization and Manage Transition Chaos

Month 1 should focus on gaining a clear understanding of your new role in the organization and building key relationships with people who are in the best position to help you succeed.

Start by Investing in Key Relationships

All sales ops leaders we interviewed agreed that it's important to set the foundation for your own success by building the right relationships.

Chris Iorio, Director of Sales Operations for residential and commercial paint manufacturer, Benjamin Moore, emphasized relationship building as the primary focus of his first 90 days. A huge fan of "The Profit" on CNBC, Chris believes in Marcus Lemonis's 4 P's for business success: People, Process, Product, and Passion. For Chris, the most important of these is people.

When Chris transitioned from a sales manager role to sales operations, he knew he had to work to build relationships with both functional partners and his new team. "You have to have the right team members in the right roles. There should be no surprises for your new team. Set goals and expectations right up front so you can get the most from the team and empower them to make decisions."

We recognize that building relationships can be more difficult for new leaders, especially if they've joined an entirely new organization, because sales ops often sits in the middle of so many other functions. You must fluidly interface across functions while understanding the motivations and sensitivities that these functional partners typically have.

Here are some key considerations to think about as you begin building stakeholder relationships.

Who You Are Accountable To?

Typically, sales ops leaders report to the most senior leader in the sales organization, the SVP of Sales or Chief Revenue Officer. But they may also be accountable for delivering results to others in the C-suite. If that's the case, we suggest meeting with these stakeholders in your first 30 days to clarify their expectations.

Below are some suggested questions for these meetings:

- What are the biggest opportunities for both field sales and sales operations this year?
- What are the biggest obstacles to achieving those opportunities?
- Which performance metrics does sales operations currently report to you? Is that still your expectation?
- How will my performance be measured?
- In what ways was my predecessor successful or unsuccessful?

Who Do You Serve?

Think about your internal customers – the functional teams you are serving. When building your interview list make sure you talk to a cross-section of high, average, and low performers on these teams. You want to hear the good, the bad, and the ugly about how sales operations performs today. Demonstrate that you're there to help everyone, not just the all-stars. Here are some questions to ask your internal customers:

- **What people, process or technology barriers make it harder for you to close business?**
- **Roughly, what percentage of your week do you spend with clients?**
- **When you are not with clients, what types of things do you spend time on?**
- **Which tools and technologies are most useful to you?**
- **What training or coaching has been most impactful in your career?**
- **In what ways can we help make you more effective?**

Who Reports to You?

Assuming you are joining an organization with an established sales ops function, it's time to get to know the team you've adopted.

Beyond the team structure, it's critical to find out which team members are high performing and well-respected within the business, and who can act as your biggest advocates. On the other hand, you'll need to identify pockets of potential resistance and the reasons behind it. Lower performers or team members who were passed over for your role may present a risk to your success. We suggest you invest the time to learn more by asking questions such as:

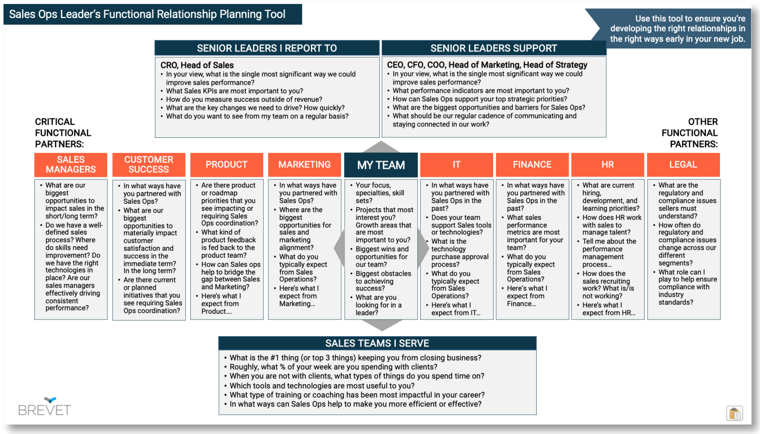
- **What has been your focus/specialty in sales ops?**
- **What barriers to success have you encountered in the past?**
- **What types of projects would you like to focus on going forward?**
- **What are you passionate about? What makes you excited to come to work?**
- **What are the biggest opportunities for sales performance improvement?**
- **Where do you foresee the biggest obstacles to achieving those opportunities?**

Who Are Your Functional Partners?

In addition to the key relationships, we discussed above, meet with any additional functional partners you're going to be working closely with. Be on the lookout for either supporters who can become allies or detractors you may need to approach with caution.

There are many, many areas you'll want to probe with functional partners. So many, the number of topics can seem overwhelming, and of course you're going to prioritize which ones are a priority for you.

We've categorized the critical functional partners in the Sales Ops' Functional Relationship Planning Tool and encourage you to use it to plan what you want to learn both from sales and the sales-adjacent functions.



Sales Department

- Sales team structure and roles (by BU, geography, and/or product line)
- Customer segments
- Territory map
- Customer assignment process
- Sales process
- Pipeline management process and cadence
- Forecasting process and accuracy
- Sales skills training and coaching approach
- Sales recruiting and onboarding process
- Sales tools and technologies
- Sales reporting, metrics, and compensation structures
- Key win/loss drivers

Customer Success Partner

- Customer satisfaction and feedback
- Issues with supply chain or logistics
- Sales crediting issues as a result of supply chain or logistics

Product Department

- Buyer personas, needs, and value messaging
- Product differentiation and competitive intel
- Product training
- Product development roadmap
- Win/loss data and other ad-hoc customer feedback

Finance Department

- Revenue booking/accrual processes
- Forecasting process and historical forecasting accuracy, by segment
- Quota setting process and historical quota attainment, by segment
- Financial reporting for Sales, Marketing, etc.
- Sales crediting and/or dispute process

Marketing Department

- Market size and penetration targets
- Ideal customer profile
- Buyer personas, needs, and value messaging
- Selling collateral effectiveness
- Effective customer promotions or campaigns
- Marketing tools and technologies
- Marketing KPIs and success metrics
- Channel approach
- Lead generation responsibilities

HR Department

- Sales team structure and role definition
- Compensation and incentive plan design and communication
- Talent management strategy
- Recruiting and onboarding plan and processes
- Training and development programming
- Significant business changes when applicable, e.g., acquisition or layoffs

IT Department

- Degree of support or administration for sales-related tools and technologies (e.g., CRM, sales enablement /content management)
- Tools and technologies that support adjacent functions like Marketing, Customer Experience, e-commerce
- Development roadmaps for internal or external tools and technologies
- Territory assignment tools and process
- Project approval/PMO process

Legal & Compliance Department

- Rules and regulations impacting sales process or storage of customer data
- Reviews of large or custom customer contracts, when applicable
- Leveraging customer quotes or testimonials

Meeting with these different groups will take much longer than your first 90 days! Your goal for the first month, however, is to make a plan to develop these critical relationships. Figure out who you need to prioritize, then start to build discussion topics and questions for these individuals.

Put Yourself in Your Partner's Shoes

Ted Colpo, Sr. VP Sales Operations and Customer Service for Essilor, the world leader in eyeglass lenses and eyewear, notes that your relationship with functional partners evolves from the starting point of your background. "The sales ops leader should be aware of where they might have a deficiency in meeting their business partner needs. They should quickly make a plan to understand as best as as possible what it's like to have the role and responsibilities of their partner. For example, if the sales ops leader does not have applied sales experience, he or she should go on sales visits, listen in on customer calls, use the sales tools and understand the compensation plans as if it were their own pay plan - in other words, to 'walk a mile in their shoes'. This is critical to truly being of service and to building the trust that is needed to be successful."

Drive Buy-In for Your Team by Making a Sales Ops Charter

We encourage new leaders to develop a sales operations charter, or mission statement, and use it to help drive buy-in for your team's function. An effective charter includes both what the sales ops function aims to achieve, and how. HubSpot's sales operations mission statement is to "enable data-backed decisions that drive growth." They aim to achieve this by:

- "Automating operational tasks and challenge case queue with a new workload"
- "Producing high-quality output and seeing projects through to completion and enablement"
- "Prioritizing our time for high business impact activities (long and short-term)"5

Within the first 90 days of his role, **Eric Filowitz, Global Head of Sales Operations and Enablement in the Data & Analytics Division at the London Stock Exchange Group**, set three strategic objectives: 1- Drive global consistency, 2- Ensure collaboration across the global team, 3- Hit our sales plan. In addition to these strategic objectives (which he sets annually for his team), Eric develops a Mission, Vision, Theme, and Mantra for him and his team:
Mission: Enable the global sales organization to act with a single identity.
Vision: The rest of the world will look to our company as the best in sales operations.
Theme: Be comfortable being uncomfortable.
Mantra: Don't confuse activity with progress.

Pat Ferretti, Head of Sales Operations and Partner Programs at B2B sales consulting firm, Force Management, also shared how important it is to establish credibility early in the role. “Putting together a sales operations charter will force you to have both strategic and tactical conversations with a variety of people across the organization. Do not be afraid to take one step back so that you can take two steps forward. The sales operations charter will need buy-in from teams across departments, including marketing, finance, IT, and customer success.”

Top Pitfalls to Avoid in Month 1

The first month of your new role should be focused on meeting your new organization and minimizing transition chaos. Here are three common mistakes to avoid during this period:

1. Making assumptions about your new role. Sales operations looks different at every organization, and the requirements of your new role will inevitably vary from your previous one. Ensure you validate your understanding of the new role by getting clear on scope, performance expectations, and how you will interact with other departments.

2. Taking people-related feedback at face-value. While we highly recommend asking for feedback about supporters, detractors, or potential obstacles in the organization, reserve the right to form your own opinion. People dynamics can be complex. As a new leader you have an opportunity to start fresh with a new direction that can drive stronger performance, engagement, and better overall working relationships.

3. Making decisions too quickly. Take the time you need to learn, understand, and build relationships within the organization before making any big decisions; it’s still only month 1, after all. You may think you’ve immediately identified what needs to change, but we suggest holding on to those decisions just a little longer to make sure you are taking the right early actions.

Days 30 Through 60: Identify Sales Operations Priorities

Take a Deeper Look at the Sales Organization

In Chapter 2 we offered a list of potential topics to discuss with the head of sales at your new organization. You will have crossed some of the items off this list in your first 30 days, but we now need a more in-depth assessment of the sales organization to identify how sales ops can have the most impact.

Below is the Sales Op's Guide to Understanding the Sales Organization Tool to help you go about this in an incredibly structured way.

Sales Ops Leader's Guide to Understanding the Sales Organization

Use this tool to ensure you're developing the right relationships in the right ways early in your new job.

		SALES DEFINITON	QUESTIONS FOR SALES OPERATIONS LEADERS	ASSESSMENT
STRATEGY	Market / Sales Strategy	A go-to-market strategy that outlines the offerings to sell to customers and channels, and the best routes-to-market to reach them.	• Is our market and sales strategy clearly defined? • Can our sales teams articulate their respective sales strategy?	
	Target / Ideal Customers	Identification of the best, or most ideal, customers to target that are a strong fit for your offerings and where you can create mutual value.	• Are our "ideal target customers" clearly defined for each market? • Can our sales teams across markets/regions articulate who their "ideal target customers" are?	
	Sales Coverage & Capacity	How you cover your market opportunity – with what resources and with how many.	• Have we identified our addressable market opportunity (new, upsell, retain)? • Are we confident in the level of resources in seat to sell to and support customers?	
	Org Structure & Role Definition	The right org structure given your market / sales strategy, as well as whether the roles are clearly defined and distinct.	• Is the business confident we have the right roles to sell to and support our addressable market? • Do our sales teams have a clear understanding of their roles/responsibilities?	
PROCESS & TECHNOLOGY	Territory & Account Planning	Creating, reviewing, acting-upon and measuring performance as it relates to territory and account management.	• Are formal Territory and Account Planning practices established and effective within teams? • Are sales teams regularly revisiting and updating their Territory and Account Plans?	
	Objective Setting & Forecasting	The way objectives (e.g., quotas or budgets) drive alignment top down and how quality forecasts act as inputs to that objective-setting process.	• Are our sales teams forecasting in a consistent and reliable manner? • Are business partners/leaders leveraging the sales team forecasts to drive business decisions?	
	Defined Sales Process	The end-to-end sales process and overall account management and growth – stages, activities, skills, and tools utilized.	• Are clear and effective sales process(es) defined for sales teams? • Are sales teams leveraging the sales process to drive customer interactions?	
	Selling Tools & Technologies	The sales tools (e.g., SharePoint, Seismic) and technologies (e.g., Salesforce.com) that the sales team uses to effectively execute their job.	• Do sales teams have the right tools and technology to sell to, and support, customers? • Are sales teams leveraging CRM in an effective and value-added manner?	
PEOPLE & ENABLEMENT	Talent Acquisition & Mgmt.	The acquisition of talent (e.g., recruiting, hiring, etc.) and managing that talent during their tenure with the organization.	• Do we have accurate job descriptions for our various sales team roles? • Is our recruiting process effective at hiring high-quality, high performing talent?	
	Learning & Development	The learning and development plans and curriculum for the sales organizations – leaders, managers, sellers, etc.	• Is there a L&D strategy that aligns to the needs/strategy of the sales organization? • Is sales training effective (drives real outcomes) and engaging for our sales team?	
	Value Prop & Messaging	The company's value proposition to the market and the value messages for different audiences.	• Is the value proposition for each market/region clearly defined? • Are there buyer personas developed for each market/region with tailored messaging?	
	Sales Content & Aids	The sales-ready content available for sellers, along with the sales aids to use in the sales process to be more efficient and effective.	• Are the right sales content pieces and aids created for our sales team? • Is the sales team able to easily and quickly find the right sales content and aids for customers?	
MGMT. & METRICS	Mgmt. Cadence & Coaching	A defined management cadence, and whether coaching is executed to improve people development and sales performance.	• Are sales managers holding regular and effective meetings with their sales teams? • Are sales managers actively coaching their sales team members against personal development plans?	
	Reporting & Analytics	The key reports, metrics and analysis that are developed and deployed to guide the sales org. in the short, medium, and long-term.	• Do sales managers receive the reports they need to understand performance/ make business decisions? • Are managers confident in the data and analytics offered to them through technology/IT?	
	Compensation & Incentives	How comp and incentives are aligned with the sales strategy and whether they are driving the right behaviors for sellers to reach objectives.	• Are sales managers confident that the total sales comp. strategy is commensurate with the job? • Is there clarity about how the total sales comp. is comprised, incl. metrics required to maximize total comp.?	
	Performance Management	How to proactively manage sales performance and accountability to minimize surprises and drive the performance-to-plan.	• Do managers effectively communicate performance expectations, objectives, and metrics? • Do managers communicate how their salespeople are doing against expectations, at least twice per year?	

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For each of 16 sales org assessment areas, we've provided a definition and recommended questions. Choose a rating system you prefer to give your assessment an overall score. A scale of 1 to 5, high/med/low, or green/yellow/red are all simple and effective choices.

The questions we included are by no means exhaustive, and the assessment should be tailored to your organization, but otherwise, this framework is an excellent way for sales ops leaders to get a clear understanding of the sales organization they will support.

Being Clear on the Definitions of "Go-to-Market"

Sales effectiveness consultant and thought leader, Tom Martin, emphasizes the importance of understanding the sales organization's go-to-market strategy. He once worked with a sales ops leader who started at a new organization with an incorrect assumption about their customer segmentation. At all of this individual's previous companies, "small businesses" were defined as those with less than 1,000 FTES, "middle market" as 1,001-9,999 FTEs, and "large enterprise" as 10,000+ FTES. It took this person months to realize that the company segmented their customers much differently – they defined "large enterprise" as any company over 1,000 FTE! You can imagine how this might impact the leader's assumption of the effort required for a strategic sale at a "large" enterprise.

We absolutely recommend collaborating with the head of sales since information may already exist, and it is his or her organization that you're assessing. At the very least, share your findings and solicit feedback.

Don't forget that you also have options as to how the assessment gets done. You can…

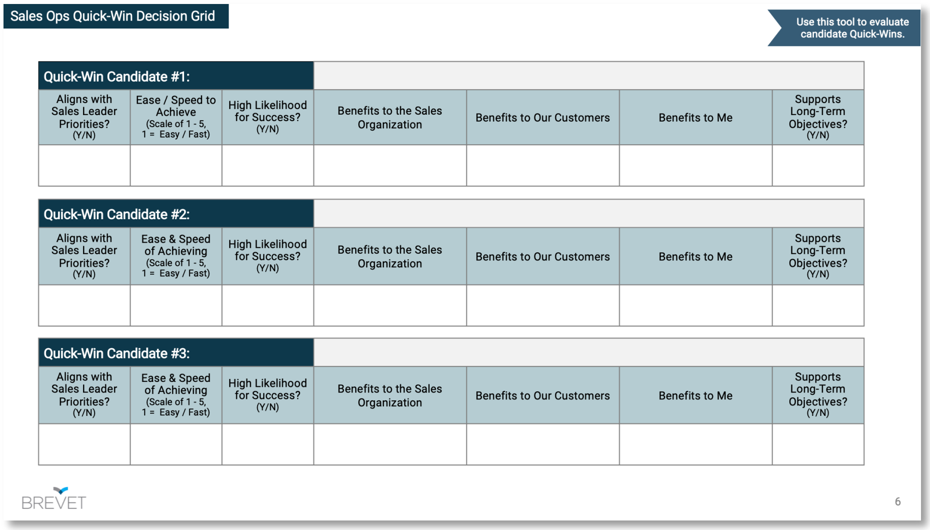
- Conduct your own research using a tool like the one we provided above.
- Collect responses from a small circle of sales leaders to identify the biggest opportunities for improvement.
- Use a third party to complete an assessment for you. An outside perspective reduces the risk of offending key stakeholders at a time when relationship building is so critical for success.

Identify Quick-Wins and Begin Implementing Them

Once you've completed your assessment of the sales organization, you can identify quick-wins that can be executed swiftly for immediate benefit.

These decision criteria make it easy to uncover quick-wins. We've added them to the below Sales Ops' Quick-Win Decision Grid that follows so you can check all that apply to prioritize or discard ideas quickly:

- Aligns with the sales leader's priorities
- Is relatively easy and quick to achieve
- Has a high likelihood for success
- Clearly benefits the sales organization, customers, and the Sales Ops leader
- Supports any potential longer-term objectives



Sales Ops Quick-Win Decision Grid

Use this tool to evaluate candidate Quick-Wins.

Quick-Win Candidate #1:						
Aligns with Sales Leader Priorities? (Y/N)	Ease / Speed to Achieve (Scale of 1 - 5, 1 = Easy / Fast)	High Likelihood for Success? (Y/N)	Benefits to the Sales Organization	Benefits to Our Customers	Benefits to Me	Supports Long-Term Objectives? (Y/N)

Quick-Win Candidate #2:						
Aligns with Sales Leader Priorities? (Y/N)	Ease & Speed of Achieving (Scale of 1 - 5, 1 = Easy / Fast)	High Likelihood for Success? (Y/N)	Benefits to the Sales Organization	Benefits to Our Customers	Benefits to Me	Supports Long-Term Objectives? (Y/N)

Quick-Win Candidate #3:						
Aligns with Sales Leader Priorities? (Y/N)	Ease & Speed of Achieving (Scale of 1 - 5, 1 = Easy / Fast)	High Likelihood for Success? (Y/N)	Benefits to the Sales Organization	Benefits to Our Customers	Benefits to Me	Supports Long-Term Objectives? (Y/N)

BREVET 6

Our favorite quick win from a sales ops leader we interviewed was this: Eliminating a sales metric that salespeople hate, is outdated, or has minimal value to the business. (Immediate value to the sales team!)

Aarti Kumar, VP of Sales Operations at ChargePoint, was able to accomplish several quick wins in her first 90 days, including improving the forecasting process, implementing a new forecasting tool, updating the sales compensation and incentive structure, and restructuring her own sales operations team to distinguish order operations activities from the more traditional "sales operations, forecasting, and systems" activities. Amid high expectations from company management and their steady drive toward IPO, Aarti and team accomplished these goals within 3 months.

Top Pitfalls to Avoid in Month 2

By the end of month 2, you should have a prioritized to-do list related to stakeholder relationships and the sales and sales ops organizations. You should also have identified and be working to implement quick wins. Here's what we want to avoid:

1. **Choosing quick wins that aren't that quick**. Make sure you're being entirely realistic when choosing quick wins. Be especially cognizant of political headwinds that could affect your success.

2. **Making too many changes too fast**. The quickest way to alienate the sales team is to force too many changes on them too quickly. Be smart and selective about what issues you choose to address in your first 60 days.

3. **Making too many assumptions or leaving large gaps in your understanding**. Plan to close any large gaps in your understanding of the sales organization as quickly as possible. Taking the time to deeply understand the sales organization now makes you that much more effective later and has the added benefit of building trust with both the field and internal partners.

Chapter 5

Days 60 Through 90: Determine Long-Term Objectives

Set Long-Term Objectives in a Thoughtful, Collaborative Way

Tackling quick wins in your first 60 days is a great first accomplishment. Spend days 60 – 90 defining the right long-term objectives. Think about quick wins as actions that can be identified, implemented, and will bear results within a sales planning year, while long-term objectives are going to take longer to either implement or return a result.

Separate quick wins from long-term objectives by being realistic about the amount of effort involved in making a change. For example, if a pipeline management process already exists, and you just need to clarify some of the stages and get the team to use the process, that may take just a few months. But if a pipeline management process does not exist, and you need to build one from scratch, starting with the customer's buying journey across multiple business segments, and then roll it out to multiple teams in multiple geographies, that's a different story.

Making the Change to Process-Driven Technology

When Kelley Blakewood accepted her new role as the Senior Director and Global Head of Sales Operations and Enablement for derivatives marketplace CME Group, she already knew there was a huge opportunity to leverage their existing CRM to better empower their sales team. Her previous experience with CME Group in a marketing capacity had already shown her the importance of avoiding silos and having well-defined requirements. This approach ensures that any changes being made are always connected directly within the sales process to avoid any friction with customers and clients. "CRM or sales technology itself is not going to solve your problems. If you build a CRM on top of a non-existent sales process, it will not work. It may even do the opposite— amplify your problems." She makes sure that any new technologies built are supporting well-defined sales processes.

Common Long-Term Objectives Mentioned in Our Interviews

- Restructuring the sales team to better align to channel opportunities
- Building out an inside sales team to gain sales and service efficiencies
- Defining, implementing, and training on a new global sales process
- Integrating multiple instances of CRM post M&A activity
- Building and launching a multi- year sales skill development program
- Designing and implementing a multi-year sales incentive and rewards program

As with quick wins, we recommend using a set of criteria to determine what your long-term objectives should be. Your resources are limited. You want to deploy them on high-impact initiatives with the best chance of success, so it pays to take the time to get this right. We like the classic BCG "Impact" vs. "Effort" matrix for this exercise.

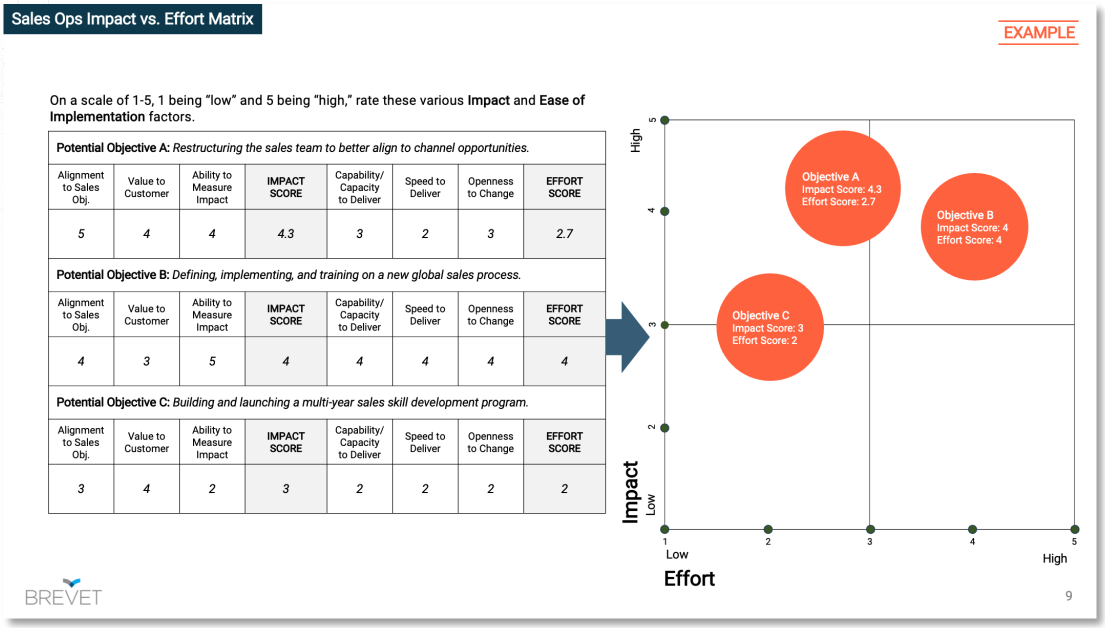
For "Impact," consider the following three factors:

1. Alignment to sales objectives
2. Value to the customer
3. Ability to measure impact

And for "Effort," consider these factors:

1. Capability to deliver
2. Speed to deliver
3. Openness of the organization to this change

Here's an example of how we've leveraged the Sales Ops Impact vs. Effort Matrix to plot three sample long-term objectives:



Potential Objective A: *Restructuring the sales team to better align to channel opportunities.*

Alignment to Sales Obj.	Value to Customer	Ability to Measure Impact	IMPACT SCORE	Capability/ Capacity to Deliver	Speed to Deliver	Openness to Change	EFFORT SCORE
5	4	4	4.3	3	2	3	2.7

Potential Objective B: *Defining, implementing, and training on a new global sales process.*

Alignment to Sales Obj.	Value to Customer	Ability to Measure Impact	IMPACT SCORE	Capability/ Capacity to Deliver	Speed to Deliver	Openness to Change	EFFORT SCORE
4	3	5	4	4	4	4	4

Potential Objective C: *Building and launching a multi-year sales skill development program.*

Alignment to Sales Obj.	Value to Customer	Ability to Measure Impact	IMPACT SCORE	Capability/ Capacity to Deliver	Speed to Deliver	Openness to Change	EFFORT SCORE
3	4	2	3	2	2	2	2

Improving Sales Manager Coaching Skills at a Private Equity-Backed Organization

David Szen, VP of Global Sales Enablement and Business Development, joined software company insightsoftware while they were setting a pace of adding up to 20+ acquisitions in a 2-year period. Like most private equity-backed companies, its BOD expects revenue results quickly, and sales performance, specifically organic growth, needed to improve. One of the first things David did was assess whether sales performance challenges were due to an enablement gap or a coaching gap. After building out dozens of enablement tools – quality sales playbooks/sales processes, messaging, and collateral – David concluded he had a coaching gap with many of the sales leaders in their first coaching role. So he immediately implemented weekly training, a manager's playbook, skill building tools and dove into 1:1 coaching to help managers learn how to leverage existing tools and to improve their skill at coaching sellers.

Top Pitfalls to Avoid in Month 3

In month 3, you should be executing on quick-wins and determining long-term objectives. While this seems straightforward, here are a couple of pitfalls to be aware of:

1. Taking on too many priorities. *Many leaders we interviewed expressed frustration with the common challenge of sales operations becoming the "dumping ground" for initiatives that aren't already being tackled by other parts of the business. Having clear objectives, a sales ops charter, and a formal way of prioritizing projects guards against being saddled with initiatives that should not be within your scope. If you need to turn down a project, making sure you can clearly articulate "why" will make life a lot easier.*

2. Not having stakeholder buy-in or support. *We see lots of client situations where sales operations has an initiative they want to drive but just doesn't have buy-in from the rest of the organization. A common situation is the desire to make necessary CRM changes. If sales leadership isn't willing to get behind the change and hold the sales team accountable for doing things differently, the initiative will fail. If you cannot get the stakeholder support you need for a long-term objective, reevaluate whether it should be a priority.*

Involve Your Team in Setting Long-Term Objectives

Collaborate with your sales operations team to evaluate and prioritize long-term objectives. It demonstrates your commitment to understanding the organization before making plans to change it. There is nothing worse than having a new leader arrive with a pre-determined agenda and a plan to execute it without bothering to understand whether it makes any sense!

Involving your team gains buying and reduces the risk of active or passive resistance to implementing your plans. As a new leader, you genuinely need your team's insight. Leverage their history and knowledge when setting long-term objectives. There's no downside!

90 Days and Beyond:
Develop a Sales Ops Strategic Plan & Roadmap

Develop the Sales Ops Strategy and Align KPIs to Measure Success

You've learned your new organization, developed key relationships, activated quick wins, and set long-term objectives with the appropriate buy-in from needed stakeholders. Now you're ready to build a sales operations strategy and roadmap that can be shared with the broader organization.

All leaders should ensure their respective functional strategies and objectives cascade, or at least align with those of the company. The full cascade of strategy and objectives should look something like this:

Rebecca Muse-Orlinoff, Head of Distribution Enablement for asset management firm Harbor Capital Advisors, Inc., shared a clear example of how organizational objectives should cascade down to sales operations and enablement objectives.

"At Harbor Funds, the distribution organization had three main objectives: to hit a gross sales number, a net sales number, and to add a target number of new types of clients to the business. Our strategies and objectives for the year clearly cascaded from these three highest level objectives.

Some examples of our objectives included increasing reporting and transparency against the gross and net sales targets, tracking the number of activity metrics against the targeted client segment, and offering education to the sales team to better sell into that new client segment. Everything we worked on supported the higher-level vision of the distribution organization."

Setting Metrics and KPIs for Sales Operations

Your strategic plan is only as strong as your ability to track progress. It's important to identify a core set of metrics that will help measure your success in your new role. Choose 5-7 metrics that the entire sales ops team can rally around.

Here are some examples:

- *Cost of sales (including sales commissions as a % of revenue)*
- *Forecast accuracy*
- *Win rates*
- *Quota attainment (what % of sellers)*
- *Seller retention*
- *Survey scores for things like sales training satisfaction and sales manager coaching effectiveness*

Everything Should Reinforce the Core Competencies of the Business

Ted Colpo, Sr. VP of Sales Operations and Customer Service for Essilor, advises that everything from projects and quick wins to long-term objectives to KPIs should align with and reinforce the core competencies of the business. "If you're Dell, you're focused on helping to sell the best computers; if you're Gartner, you're focused on helping to deliver the best research; if you're Essilor, you're focused on helping to provide the best lenses and eyewear." Ensure your plans and strategy clearly reflects the organization's core purpose and competencies.

Example Organizational Objectives to Align With

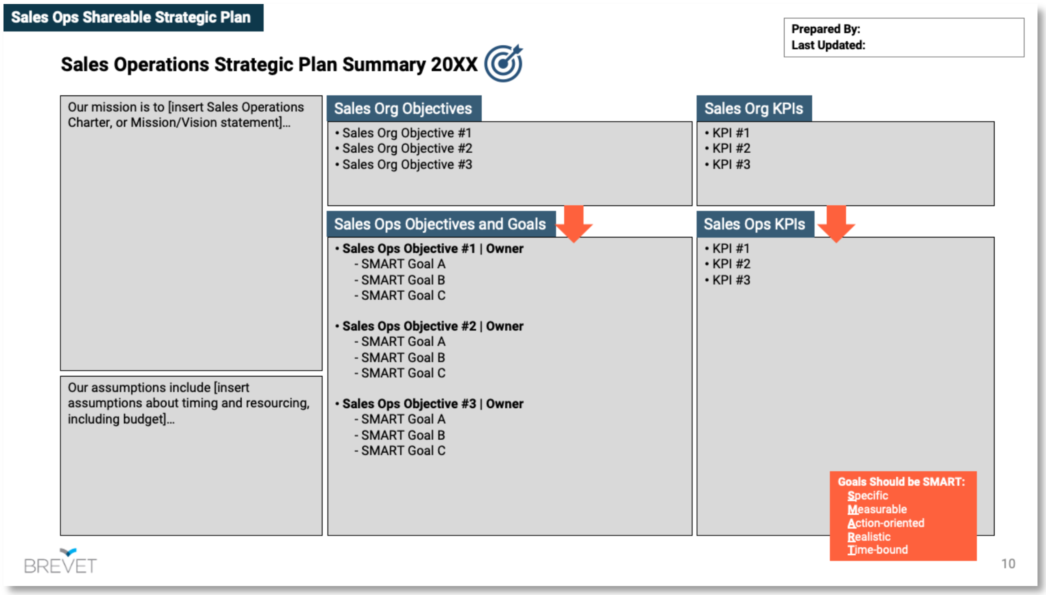
- *Hitting overall revenue targets*
- *Achieving growth within a specific segment or geographic region*
- *Launching a new product or service*
- *Defending a core part of the business against competitors*
- *Managing or minimizing business costs in response to economic pressure or upcoming opportunity (e.g., an IPO)*

Template for Building Your Shareable Strategic Plan

To make your strategy easy to articulate to stakeholders, summarize it in a limited number of pages with just a few critical components like those listed below:

- Charter or mission/vision statement
- Summary of the field sales organization's objectives and KPIs
- Summary of sales ops objectives and KPIs, showing alignment with the sales organization
- Any assumptions you're making that impact success
- High-level Gantt chart showing the sequencing and timing of each objective

Check out the Sales Ops Sharable Strategic Plan Template to see how these various pieces can come together:



Continually Reassess and Realign Your Sales Operations Strategy

Set a cadence to revisit and realign your sales operations strategy with the field sales as it undergoes any changes. We recommend building your strategy annually and reviewing it quarterly to determine if adjustments must be made. Don't be afraid to shift strategy when necessary, but be crystal clear on the reasons why. Strategies have to be communicated effectively so that people know what to do individually to execute on it, and a constantly shifting strategy will breed confusion.

Russ Walker, SVP Sales Operations & Enablement for IT service management company, Datasite, emphasized the importance of a well-thought-out communications cadence. "If you don't have a sales communication plan, you're missing the boat," Russ says. And we know he means it. His Sales Enablement team spends significant time and effort crafting and communicating sales success stories, best practices, and executive video messaging to reinforce the winning and collaborative sales culture at Datasite.

Pitfalls to Avoid When Setting a Sales Operations Strategy

Pulling together a strategy, communicating it effectively, executing on it, and being disciplined about measuring progress is a tall order. Here are a few common pitfalls to avoid:

1. Developing an Overly Complicated Sales Operations Strategy.
A strong sales operations strategy clearly aligns with the rest of the organization. As you socialize your strategy with others, if it seems hard to articulate, you may have overcomplicated things. Limit the number of top-level objectives and maintain a tight list of associated KPIs. Goals and implementation items then cascade down. Structure like this allows you to share the appropriate level of detail based on the audience. Your boss and sales ops team may need the detailed version of the strategy, but it's likely that other functional partners just need a good summary.

2. Not Aligning Sales Ops Objectives and KPIs with the Field Sales Organization.
Regularly check to ensure you're holding your team accountable for achieving the right things. Be especially careful to ensure KPIs line up to what field sales and the overall company are trying to achieve.

3. Getting Distracted by Day-to-Day Requests.
In a recent interview with SBI[6], Steve Rutledge, SVP Global Sales Ops & Enablement at Genesys said "we can do anything, but we can't do everything. Everyone has an opinion. We have to be able to say 'we have a strategy and it's informed,' otherwise you'll get bogged down with distractions." Most of the sales operations leaders we interviewed expressed a similar sentiment. Creating a "parking lot" for the requests that come in daily and setting a cadence for evaluating them will help keep your team focused on the thoughtful strategy you've put together.

Final Advice to Sales Ops Leaders Embarking on Their New Role

• "Show that you have love and passion for the job and your customer's job. Do that by showing that you are a trusted leader with a strong work ethic. Jump right in and get involved with as many people as possible."

• "Be sure to demonstrate empathy in your partnership with sales; make sure you are living in the shoes of sales reps. Before you roll out a new technology, or best practice, make sure to 'sense-check' things. Test everything and make sure it makes sense."

• "Ultimately, you are problem solving with people every day. Your mindset has to be ready to change the tools you choose to adopt and make available to the sales team. You have to keep teaching yourself and be on the forefront of new tools and technologies. And you need to know how to use what your salespeople are using inside and out."

• "Be comfortable in gray areas and with situations that are fluid. Particularly in an operations role, you'll be getting under the hood and will have to figure out what is working and what is not. The inclination is to want to fix things right away, but you have to have patience and be ready to absorb the organization and learn what they do on a day-to-day basis."

Footnotes

[1] Gottlieb, J. and Weinberg, A. (2019, September 19). Catch Them If You Can, How Leaders in Data and Analytics Have Pulled Ahead. McKinsey & Company. https://www.mckinsey.com/business-functions/mckinsey-analytics/our-insights/catch-them-if-you-can-how-leaders-in-data-and-analytics-have-pulled-ahead

[2] Dent, C. and Dunham, C. (2020, September 12). Sales Operations: The Secret Weapon to Every High Performing Sales Organization. Bain and Seismic. https://learn.seismic.com/ondemand-the-secret-weapon-to-every-high-performing- sales org.html?utm_source=twitter&utm_medium=social-organic

[3] Castrillon, C. (2020, December 27). This is the Future Of Remote Work in 2021. Forbes. https://www.forbes.com/sites/carolinecastrillon/2021/12/27/this-is-the-future-of-remote-work-in-2021/?sh=675892691e1d

[4] Gartner for Sales. (2020). State of Sales Operations Report: Key Findings. https://www.gartner.com/en/sales/trends/state-of-sales-operations-report-key-findings

[5] Frost, A. (2020, November 2). The Ultimate Guide to Sales Operations in 2021. HubSpot. https://blog.hubspot.com/ sales/sales-operations

[6] SBI: A Quick Guide To Implementing a Sales Operations Strategy - https://salesbenchmarkindex.com/insights/a-quick-guide-to-implementing-a-sales-operations-strategy/

About The Brevet Group

The Brevet Group is a sales effectiveness and consulting firm that builds amazing sales teams. Our unique approach applies modern sales enablement practices to customized sales performance solutions.

We partner with clients who have the vision and guts to reimagine their approach to sales. We combine the discipline and insights of management consultants with the practicality of sales training to deliver impactful programs that move the needle quickly.

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