Scaling Inside Sales Teams

March 21, 2017
Mark Ruthfield

- 20+ years leading technology companies in startup, turn-around, & accelerated growth.
- Recruit, build, & lead loyal, dedicated, high-performing sales teams that “do” vs. “talk about doing” via repeatable sales processes and best practices.
- Achieve record highs in year-over-year, quarter-over-quarter sustainable growth.
- Align personal career growth goals to company goals (promoted over 30 team members over last 7 years).
- Awards and Recognition:
  - “Top 25 Most Influential Inside Sales Professionals Prestigious Award” for the American Association of Inside Sales Professionals (AA-ISP) 6 years in a row.
  - “Highest Rated Presenter Sessions” scored by attendees (Denver & Boston 2016 AA-ISP events).
  - “Sales Team Growth Achievement of the Year”, “Sales Department of the Year”, “Sales Process of the Year” (Stevie Sales Awards 2014, 2016).
  - “East Coast’s Top Movers & Shakers of SaaS Sales” (Soto Ventures, 2016).
Company Overview

Zaius, Inc
- Venture capital-backed, private company ($14.3M total funding)
- Initial venture investment in 2014, commercial launch in 2015
- Focused on B2C ecommerce businesses in and around the midmarket, from SMB to Enterprise
- Offices in Leesburg, VA and Boston, MA

Product
- B2C CRM platform
- Real-time, cross-channel marketing automation and attribution built on a single customer view
- Increase repeat purchases, lifetime revenue of customers

Investors:
Now How Do We Achieve Sustained Growth Via Inside Sales?

Creating A High-Performing Inside Sales Team

1. ONBOARDING
   Repeatable process to get ‘smart’

2. STRATEGY
   Selling model, segments defined

3. PLAYBOOK
   Repeatable approach to selling

4. PRICING
   Consistent, value-based

5. WIN
   Working as a team

Inside Sales Metrics That Matter

Motivating Compensation Plans

Align To Startup’s Goal of Exhibiting Qtr over Qtr Growth:

- Ability to not just see the top of the mountain but well beyond.
- Provide the annual quota well in advance of January 1st.
- Create a sense of urgency for consistent monthly bookings.
- Reward for overachieving.
- Pay variable commission in the first pay period for the prior month.

Inside Sales Startup Example:

- 2017 Annual Quota: $x
- 2017 Monthly Quota: $x

- Standard Comm Rate Every $ Up To Quota: x% (Variable Comm/Quota)
- Accelerator Comm Rate Every $ Over Quota: 1.5x% (Standard Comm Rate x 1.5x)
- Ability to earn accelerators reset monthly.
- Concern of gaming the system is low with active management.
Inside Sales Startup Example:

- Start Day 1 of a quarter.
- For every 25% increase in legit pipeline, you get a $300 bonus.
- Bonus can be earned until legit pipeline gets to 3X quarterly quota.
- Announce results at weekly team meeting and during 1-on-1’s to drive behavior and accountability.

### Making Pipeline Building Fun Via Quarterly Bonus Spiffs

<table>
<thead>
<tr>
<th>Sales Rep</th>
<th>1/1/17 Baseline Pipeline $</th>
<th>2/28/17 Pipeline $</th>
<th>% Chg</th>
<th>$ Chg</th>
<th>3X Quota Pipeline Goal</th>
<th>To 3X Quota Pipeline Gap</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rep 1</td>
<td>$x</td>
<td>$x</td>
<td>x%</td>
<td>$x</td>
<td>$x</td>
<td>$x</td>
</tr>
<tr>
<td>Rep 2</td>
<td>$x</td>
<td>$x</td>
<td>x%</td>
<td>$x</td>
<td>$x</td>
<td>$x</td>
</tr>
<tr>
<td>Rep 3</td>
<td>$x</td>
<td>$x</td>
<td>x%</td>
<td>$x</td>
<td>$x</td>
<td>$x</td>
</tr>
<tr>
<td>Rep 4</td>
<td>$x</td>
<td>$x</td>
<td>x%</td>
<td>$x</td>
<td>$x</td>
<td>$x</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>$x</strong></td>
<td><strong>$x</strong></td>
<td><strong>x%</strong></td>
<td><strong>$x</strong></td>
<td><strong>$x</strong></td>
<td><strong>$x</strong></td>
</tr>
</tbody>
</table>
### Goal: Consistent Rep Productivity

#### Sales Quota Attainment (%)

<table>
<thead>
<tr>
<th>Sales Rep</th>
<th>10/31/16</th>
<th>11/30/16</th>
<th>12/31/16</th>
<th>1/31/17</th>
<th>2/28/17</th>
<th>Quota</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rep 1 (start date)</td>
<td>x%</td>
<td>x%</td>
<td>x%</td>
<td>x%</td>
<td>x%</td>
<td>x%</td>
</tr>
<tr>
<td>Rep 2 (start date)</td>
<td>x%</td>
<td>x%</td>
<td>x%</td>
<td>x%</td>
<td>x%</td>
<td>x%</td>
</tr>
<tr>
<td>Rep 3 (start date)</td>
<td>x%</td>
<td>x%</td>
<td>x%</td>
<td>x%</td>
<td>x%</td>
<td>x%</td>
</tr>
<tr>
<td>Rep 4 (start date)</td>
<td>x%</td>
<td>x%</td>
<td>x%</td>
<td>x%</td>
<td>x%</td>
<td>x%</td>
</tr>
<tr>
<td>Wtd Average Performance to Quota</td>
<td>x%</td>
<td>x%</td>
<td>x%</td>
<td>x%</td>
<td>x%</td>
<td>x%</td>
</tr>
</tbody>
</table>

#### Sales Attainment ($k)

<table>
<thead>
<tr>
<th>Sales Rep</th>
<th>10/31/16</th>
<th>11/30/16</th>
<th>12/31/16</th>
<th>1/31/17</th>
<th>2/28/17</th>
<th>Quota</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rep 1 (start date)</td>
<td>$x</td>
<td>$x</td>
<td>$x</td>
<td>$x</td>
<td>$x</td>
<td>$x</td>
</tr>
<tr>
<td>Rep 2 (start date)</td>
<td>$x</td>
<td>$x</td>
<td>$x</td>
<td>$x</td>
<td>$x</td>
<td>$x</td>
</tr>
<tr>
<td>Rep 3 (start date)</td>
<td>$x</td>
<td>$x</td>
<td>$x</td>
<td>$x</td>
<td>$x</td>
<td>$x</td>
</tr>
<tr>
<td>Rep 4 (start date)</td>
<td>$x</td>
<td>$x</td>
<td>$x</td>
<td>$x</td>
<td>$x</td>
<td>$x</td>
</tr>
<tr>
<td>Total</td>
<td>$x</td>
<td>$x</td>
<td>$x</td>
<td>$x</td>
<td>$x</td>
<td>$x</td>
</tr>
</tbody>
</table>
THANK YOU!

Prepared By

Mark Ruthfield
Vice President of Sales, Executive Team at Zaius
mark.ruthfield@zaius.com
508-277-8446