

# THE SALES OPS HANDBOOK



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# WELCOME - TOM HUNT HEAD OF MARKETING

@EBSTA

I joined Ebsta knowing nothing about sales ops.

Ebsta has been serving this great profession since the launch of Ebsta in 2014, but I knew nothing.

I could have spent hours quizzing our sales and product teams, or annoying our 1,500 customers with really simple questions.

Or...

I could have found the best sales ops professionals in the world on LinkedIn, and then pinged them a direct message asking if they would be happy to share their wisdom.

Can you guess which I chose?

The latter. And the Sales Ops Demystified podcast was born. Multiple times per week, I jump on a video call with a Sales Ops Ninja.

At the time of publishing this eBook, 30 interviews have already been recorded. Around a month ago I sat down to summarize some of the key insights to publish on our blog.

After reviewing a couple of episodes I was astounded by the amount and quality of insights... the blog post kept getting longer and longer.

And it's now morphed into what we believe to be the most comprehensive handbook for sales ops professionals to date.

We hope you enjoy reading it as much as we as we enjoyed creating it.



# FOREWORD - JEFF SERLIN, GLOBAL VP OF SALES OPERATIONS

@INTERCOM

My first role after school was as an industrial engineer...

I was working for General Motors in a new team which was simply shown a problem and instructed to "go fix this". It was just me and a manager and we had to figure out how to fix this "thing". The details aren't important but the directive involved:

- Applying some creativity and innovation.
- Leveraging our data analysis skills.
- Pulling stakeholders together to agree a solution.

We drove a lot of change and in many ways, I described that first job as simply "fixing something".

Making something better... which is also how I like to describe sales ops. In my first "sales ops" role (it wasn't called that back then), at GoldenGate Software (acquired by Oracle in 2009), I was the person that said, "Well, geez, shouldn't we manage our pipeline somewhere?"

I started with an Excel spreadsheet and that was it. We started building a repeatable process around our sales process and demos. After wrapping some flowcharts and stages around that



**Jeffrey Serlin**  
VP Sales Operations of Intercom

we had a clear journey to executing deals.

Nowadays, sales ops is significantly more complex and seems to be growing every month by necessity. Our sales ops team at Intercom just reached 25 people and are responsible for:

- Sales strategy.
- Sales planning
- Territory mapping.
- Coaching/onboarding.
- Sales enablement.
- And much more...

I was honoured to be interviewed on Sales Ops Demystified and can't think of anyone better than the Ebsta team to pull together the wisdom from us podcast guests to produce the go to guide for sales ops professionals.

# CHAPTER 1 - HOW DO YOU GET INTO A CAREER IN SALES OPS?

A career in sales ops can be exciting, challenging, and highly rewarding. In recent years, the corporate world has gradually started to recognize the irreplaceable value of a well-integrated, highly focused, and efficiently managed sales ops team to support overall sales objectives.

As a consequence, increased emphasis has been placed on filling out sales ops roles with highly qualified, experienced, organized, and personable candidates.

## HOW CAN YOU BREAK INTO A CAREER IN SALES OPS?

The good news is that roles in sales ops embrace a wide variety of requisite skills, education levels, work experiences, and personalities.

Lets first define sales ops, it's importance, and discuss some examples of how our expert guests got into a sales ops career.

## WHAT IS SALES OPS?

The primary role of sales ops is to reduce friction in the sales process in order to empower reps to hit and surpass their targets. Sales ops encompasses a large number of support functions for the customer-facing sales team, including training and development, creation of compensation schedules, lead management, territory structuring, process optimization, and many other activities.

## WHY IS SALES OPS IMPORTANT?

While employees in sales ops typically work behind the scenes to support the customer-facing sales team, they play a vital role in identifying performance levels and meeting important benchmarks.

For instance, sales ops managers that take time to train and develop the skills of average or below average selling team members have a huge impact on the company's overall profitability.

Accelerating a larger group of average performers in the sales team will almost always yield far more revenue than the equivalent gains among the smaller demographic of top performers. One report found that the different impact on revenue was as much as 91%.

This only serves to illustrate the positive impact that sales ops can produce marginal gain in the right areas.

## HOW TO GET INTO A CAREER IN SALES OPS

There are a number of possible routes to take that will lead to a career in sales ops. We've catalogue how some of the most successful executives, managers and associates began their journeys.



## SALES

Perhaps the most “organic” way to start a career in sales ops is to first work in a customerfacing sales role. You gain an insider’s perspective of the daily challenges that salespeople face, their major motivators, and how the end-to-end sales process works.

There are many examples of successful transitions from sales to sales ops.

For instance, Katyusca Barth, Sales Operations Manager at Intralinks, started out as a salesperson at 15 years of age in Brazil. She made cold calls, then began creating graphs and reports, and even designed a CRM that would streamline her company’s sales process.

Finally, with her on-the-ground experience in the sales world, she was able to successfully move to a role in sales ops.

## ADMINISTRATION

Transferring out of an admin role is, in a sense, a “backdoor” option for gaining entry into the world of sales ops. If you’re currently in an administrative role, it’s a good idea to ask if you can spend a portion of your time shadowing salespeople, or working on a small project with your organization’s sales ops team.

This will allow you to gain valuable insight into the sales process which, when combined with the organizational and interpersonal skills you’ve gained from your admin role, can help make you a very attractive candidate for a sales ops position.

Solomon Jehu-Appiah, Business/Sales Ops Analyst at Talkdesk, graduated school as an engineer, but initially found employment as an admin at a materials company. This position “was literally like a sales support/associate role, and it never changed.”

He performed whatever tasks the company needed at the time, from administrative duties, to supporting sales calls and customer service activities.

The CRM he used was outdated and would frequently crash, so Solomon asked if he could find a better solution. He was able to implement a better, faster CRM system, and even train colleagues to work with the new software.

This resulted in a passion for finding and implementing optimal solutions for sales processes, and very naturally led into a position in sales ops.

**Brandon Bussey**  
Director of Sales  
Operations of Lucid



## FINANCE

Sales ops and finance may seem like two completely different worlds at first glance, but many of the same principles that apply to financial and strategy work also hold true for roles in sales ops.

Brandon Bussey, Director of Revenue and Account Operations at LucidChart, graduated as a finance major from college. He realized that in the financial industry, roles generally fell into one of two basic categories: the back-office, support type of jobs that focused heavily on rigid regulations and compliance, and the more strategic, partner-type roles that involved broader planning and consultation skills.

Brandon always preferred the second category to the first. When contemplating a role transition, he would always make sure that he was “doing the due diligence to understand, what type of financial organization is this?”

While on vacation, he visited Amazon HQ at the urging of a friend, and during his visit discovered the world of sales ops. He immediately became fascinated by the elements of strategic planning, analysis, and collaborative consultation that are so essential to this field. His experience in the financial sector gave him a key advantage as a prospective player in sales ops, and he transitioned to Amazon shortly thereafter.



## INDUSTRIAL ENGINEERING

Transitioning from an engineering role to sales ops may seem like a course that's far off the beaten path. Yet, there are several similarities between engineering and sales ops positions.

For instance, a couple of major functions of industrial engineering are (a) to eliminate wastefulness and (b) to increase efficiency in production processes. While engineers strive to achieve these two objectives within a manufacturing framework, leaders in sales ops seek to accomplish the same things within a sales and marketing environment.

Moreover, the analytical skills that an industrial engineering role requires fit hand in glove with the demands of a role in sales ops. Jeffrey Serlin, currently the VP of Sales Operations at Intercom, illustrates the truth of this correlation.



**Jeffrey Serlin**  
VP Sales Operations of Intercom

He started his career as an industrial engineer in the automotive industry, and his first job was to lead "a new group, a new team and [my employers] pointed to a problem and they said, 'go fix this.' It was me and a manager and we figured out how to fix this [problem]."

Through a blend of creativity, innovation, rigorous data analysis, and persuasive arguments to key stakeholders, Jeffrey and his team were able to optimize the

company's process and drive positive change. After some time had passed, Jeffrey looked back and realized that even though his position was in the automotive industry, "it was still [like sales] operations."

After his experience as an industrial engineer, his passion for analyzing problems and collaborating with others to create workable solutions led him to a career in sales ops, first with Marketo and then with Intercom, where he currently works today.

## SUMMARY

As the above examples clearly demonstrate, sales ops is a field that offers many exciting career opportunities to aspiring entrepreneurs, managers, and executives. Breaking into a career in sales ops requires hard work and perseverance, but the reward is well worth it.

# CHAPTER 2 - WHAT MAKES AN AWESOME SALES OPS LEADER?

Sales ops leaders are like steam locomotives. Good sales ops leaders have fire in the belly to propel the train (read: sales team) forward to attain organizational goals. They have a vision, self-drive, and dream big with their eyes open.

Great sales ops leaders are resources that sales representatives depend on for assistance to accomplish their goals and overcome obstacles. They challenge their teams to keep moving or get left behind.

According to the Harvard Business Review, the quality of a sales ops manager has a significant impact on the performance of sales reps. In a recent study, 69% of salespersons who exceeded their quota rated their sales ops leader as excellent. Below are seven traits that make awesome sales ops leaders based on the insights of our podcast guests and some further research.

## 1. SOFT SKILLS



Cris Santos  
Head of Revenue Strategy and  
Operations at Pluralsight

In our podcast, many guests agree that an awesome sales ops leader should have incredible soft skills. Cris Santos, Head of Revenue Strategy and Operations at Pluralsight professes that an awesome sales professional must be someone who listens. She says that it's essential for sales ops leaders to listen to the business and units that support them.

A big mistake that many sales ops leaders make is not listening to others and following their ideas and perspectives.



Claire Maisonnave-Couterou  
EMEA Sales Operations  
Manager at Kyriba

To get things done, you must learn to listen to other stakeholders and partners as well as speak a language that all people comprehend.

Claire Maisonnave-Couterou, EMEA Sales Operations Manager at Kyriba concurs with this, saying that an awesome

sales ops professional must be a good listener. Additionally, they should be empathetic and understand his team and clients. Forbes seconds that empathy is fundamental in all successful sales techniques. Whether you are dealing with clients or employees, empathy goes a long way to build professional relationships and loyalty.



Jonny Day  
Head of Sales Operations  
of Crowdcube

Apart from listening, a good sales ops leader must ask questions and challenge the status quo. Jonny Day, Head Of Sales Ops at Crowdcube declares that a good sales ops person must understand the sales team, its motivations, commercial goals, and what they want to achieve.

Other soft skills necessary for a sales ops leader include communication skills, presentation skills, abstract reasoning, interpersonal skills, and negotiation skills.

## 2. COMMAND INSTINCT

As a sales ops leader, your position and title grants you power that you must exercise. Sandeep Sachdeva, Global Head of Sales Operations at Unity Technologies says that sales ops leaders must have the ability to bring people together to achieve a common goal and hold them accountable for their actions.

Sales metrics such as quota attainment, average deal size, conversion rate, and forecasting accuracy can be used to measure the performance of sales team and hold them accountable.

The command instinct discussed in this point is not the autocratic one. It is motivating sales teams to improve themselves continually. Praising the overachievers and admonishing underachievers to eradicate complacency is an excellent place to start.

## 3. COLLABORATOR

Jonny Day, Head of Sales Ops at Crowdcube contends that cross-collaboration is vital for sales ops leaders. They must learn to work with other departments ranging from product to engineering, legal, and finance. Collaboration ensures that the customer is in the middle of your business model, and everyone else is offering support.

Mohit Bhargava, Head of Sales Operations and Planning at one of the large tech companies, says that a successful sales ops person should partner with senior sales leadership in revenue planning, forecasting, strategic planning, and sales go-to-market strategy. They should establish himself as a trusted advisor to sales leadership.



**Mohit Bhargava**  
Business Planning  
Operations of Big Tech Co.

## 4. HIRING ABILITY



**Alan Kingsley Perkins**  
Sales Operations and Business

In our podcast, Alan Kingsley Perkins, Sales Operations and Business Consultant at KingsleyPerkins Ltd, states that a great sales ops professional should have the ability to hire the right people. When you hire the wrong salespeople, the onboarding process is affected, and turnover rates increase.

The Harvard Business Review concurs with this view. It opines that high-performing sales ops leaders must know how to hire quality talent. They hire salespeople who are relationship builders, persuasive, and experts in the sales cycle.

## 5. KNOWLEDGEABLE

Most experts in our podcast affirmed that it is not necessary for sales ops leaders to have prior sales experience to succeed in sales ops (See Chapter 3). However, they agree that a remarkable sales ops leader must be knowledgeable and understand the sales process comprehensively.

Cris Santos, Head of Revenue Strategy and Operations of Pluralsight says that although many people end up in sales ops because of their finance or consulting background. She started in a military setting with four years in the Navy, before proceeding to the corporate world to pursue sales ops.

Even without prior sales experience, Cris declares that an awesome sales ops leader must be knowledgeable and have the ability to get things done.

Katysca Barth, Sales Operations Manager at Intralinks professes that a sales ops leader should understand clients and how they make decisions.

A good sales ops leader should be knowledgeable on the sales process, including prospecting, lead management, technological proficiency, handling objections, and command of the sales process.

A sales ops leader who does not understand the sales process encounters difficulties hiring the right people, training them, and evaluating their performance. Mohit Bhargava, Sales Operations and Planning of one of the large tech businesses, contends that a great sales ops leader should point out things that are not okay and those that are.

## 6. COMMERCIAL-MINDED

Jonny Day proposes that an awesome sales ops leader must be commercial-minded. He should “understand the heartbeat and rhythm of his company.” As a sales ops leader, you should understand what your company is trying to achieve as well as its future goals. Dante Hawkins, Director of Sales Operations at Springbot, contends that an awesome sales ops leader should have the capacity to “see the big picture without missing the details”.

Such an approach ensures that sales teams are supported so that they increase the organization's revenue.

A sales ops leader should also be growth-driven and an expert in leveraging any opportunity that comes his team's way. Also, he should not hesitate to make difficult decisions to cut out losses. For instance, if a sales team is underperforming amidst coaching and training, then it may be the time to cut the underperforming reps considering the impact they have on revenue.

Joe Gates, Sales Operations Manager at Spendesk professes that a great sales ops leader should have the ability to dig into “the why”. He must account for occurrences in sales by asking what is happening, why it is happening and its impact. When you are unleashing changes that will make the sales team's life better, you must have the ability to secure buy-in for the changes.



**Dante Hawkins**  
Director of Sales  
Operations at  
Springbot



**Joe Gates**  
Sales Operations  
Manager at Spendesk

## 7. COACHING ADAPTABILITY

Coaching is a fundamental part of the sales process. Great sales ops leaders are great coaches and understand the diversity of selling styles among sales reps.

They don't use a one-size-fitsall coaching style on every salesperson.



Instead, a good leader modifies the coaching style to suit the needs and style of the individual salesperson. He respects the strengths and weaknesses of individual contributors and tailor training and coaching to a contributor's unique needs. Good coaching ensures that sales teams can overcome any challenges that come their way as the market and business landscape changes.

Also, instead of a sales ops leader using his title and power to order people around and giving them solutions, a more coach-like approach would be better. It is best practice to dialogue with the sales team and present questions to them so that they can individually or collectively develop a solution.

Katjusca Barth, Sales Operations Manager at Intralinks affirms that a sales ops leader must be connected to his team. This way, he understands what is happening in the team and what challenges they are encountering.

A great sales ops leader is also a builder who is always thinking about building a sales team that will scale.

He empowers salespeople through training, mentoring, onboarding, promotions, and offering guidance that motivate

A great leader develops clearly defined roles, promotion paths, and success metrics and inspires everyone to be a leaner and aim higher.

Managing a team of top-performing salespersons is not easy and can be compared to rejigging a puzzle. From mentoring the strong salespersons to coaching the untrainable, an awesome sales ops leader must have the right combination of skills for his team to perform like a welloiled machine.

A heated debate exists on whether great leaders are made or born. We strongly believe that great sales ops leaders are made, not born.

An awesome sales ops leader is a lifelong student of the sales process and must develop competence in process and productivity, sales talent management, using metrics and rewards, and customer management



**Katjusca Barth**  
Sales Operations Manager at Intralinks



# CHAPTER 3 - IS SALES EXPERIENCE NECESSARY FOR SALES OPS?

Sales Ops is the backbone that supports the sales teams. They create the strategies and workflows that enable sales to convert more prospects, generate more opportunities, and maximize their daily activities to contact as many high-value clients as possible.

But, do you need sales experience to do that?

We've talked with tons of top-level Sales Ops across industries in search of the answer to: "Does Sales Ops need sales experience?" Here's what we learned.

## WHAT IS SALES OPS RESPONSIBLE FOR?

In Chapter 1 of the Sales Ops Handbook, we talked about what Sales Ops is... but what business processes that the sales ops department is responsible for?

After all, if we're trying to discover if sales experience is a necessity for the Sales Ops role, it's essential to know what sales ops actually does.

The sales ops umbrella captures the following responsibilities:

### STRATEGY

Sales ops is responsible for defining the goals and vision for the entire sales department. And, they have to be able to develop the strategies necessary to support these goals. Remember, sales ops is the glue that tethers business with sales objectives together.

This includes things such as:

- Territory design
- Defining the sales coverage model
- Goal setting and KPI development
- Data analysis and forecasting
- Defining the broad sales process
- Structuring the individual components of the sales process
- Sales and operations planning (S&OP)
- Leveraging market research, competitor research, and internal data to predict and define sales models.
- Using "big data" and data warehouses to drive superior reporting and analytics
- Channel definition

## OPERATIONS

Sales ops also bear the burden of administration and leadership. This means that sales ops plays a front-room and backroom role in the sales process and handles onboarding and contracts.

Including but not limited to:

- Training staff in products
- Training staff in markets
- Training staff in sales processes
- Hiring and onboarding sales talent
- Handling contracts and service level agreements (SLAs)
- Mentoring and coaching
- Technology

Effective sales teams require an effective sales stack. Sales ops manage the sales stack and make recommendations and upgrades based on market research and cutting-edge insights.

Including but not limited to:

- Choosing and integrating sales tools
- CRM customization
- Reporting
- Managing the CRM (with IT support)
- Managing sales data captured by the stack
- Leveraging sales stack data to improve existing systems
- Performance

Finally, sales ops plays a vital role in the overall performance of the sales team. Really, all of the above roles (i.e., strategy, operations, technology) are levers that unlock this final role. But, there are performance-centric responsibilities that sales ops must provide.

Including but not limited to:

- Compensation and incentives
- Maintaining sales collateral
- Booking appointments
- Championing sales systems and processes
- Handling lead gen strategies
- Maximizing sales wins while shortening cycles
- Pipeline optimization

That's a TON of responsibility. Sales ops must understand the role of sales and the processes that go into creating effective salespeople. And, they should be able to leverage technology to bring tangible results to the sales cycle. Remember, good salespeople have one thing on their minds - sales. Sales ops help them handle the technology and organization that goes into creating those sales.

Here's the question - do you need sales experience to do all of this?

## WHAT DO WE MEAN BY SALES EXPERIENCE?

"If you have prior experience in sales, you know the language, you know what makes them tick. I found that because I worked in sales, I knew their sense of agency" - Katyusca Barth, Sales Ops Manager at Intralinks

Sales experience can mean a lot of different things. Does that mean experience in any sales situation? Or, do we mean sales experience in regards to sales management?

By sales experience, we mean experience operating within a sales system. Sure, there are plenty of unique sales systems and processes that are leveraged by various businesses looking to measure and adhere to hyper-specific goals. But, if you've been involved in a sales system before, you should have a general understanding of the surface layers of sales.

But is it required?

## DO YOU NEED SALES EXPERIENCE TO OPERATE IN SALES OPS?

"In my career, I've seen a lot very successful sales ops professionals who came from a diversity of backgrounds" - Sandeep Sachdeva, Global Sales Ops Manager at Unity Technologies.

The majority of guests interviewed on Sales Ops Demystified (+60%) said that sales experience WAS NOT necessary to operate in sales ops. This may seem strange. After all, Sales Ops is directly connected to sales. And, understanding the day-to-day challenges, stressors, and language of sales is a core component of being a successful sales ops leader and champion enforcer of sales best-practices.

But, sales ops exists in a unique space that encompasses sales, administration, engineering, technology, and data science. So, while sales experience is a fantastic way to immediately understand some of the nuances of sales ops management, it's not necessarily a requirement for entry. You don't need sales experience to be a sales ops

professional. In fact, many of our sales ops leaders that we interview on Sales Ops Demystified had no formal sales background. But, that doesn't mean that sales experience doesn't help. Those that worked in sales roles in the past will have an advantage over those that didn't — especially when it comes to understanding the needs of salespeople.

But, as the role of sales ops expands, anyone from any line of business has the chance to excel as a sales ops professional; you just need the right mentality

## FINAL THOUGHTS

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# CHAPTER 4 - WHAT ARE THE MOST USED SALES OPS TECH TOOLS?

Sales is in the middle of a technology transformation. Every sales team on the planet is undergoing rapid changes, and emerging tech like AI, automation, voice, and machine learning are becoming critical drivers for sales success. A core component of sales ops is the ability to identify the most valuable technology in the sales space and leverage that tech to produce better results and get more wins.

In the Sales Ops Demystified Podcast, we took to the world's most successful sales ops leaders to identify which tools were valuable in the sales space, and what leading sales teams tech stack looked like.

## UNDERSTANDING THE SALES OPS TECH STACK

The sales ops tech stack is the combination of tools (typically cloud-based software) that sales ops use to improve performance. An important note here is that the sales ops tech stack differs slightly from the sales stack.

The sales stack is the combination of tools that the sales team uses. Obviously, the sales ops tech stack includes all of those tools — since a primary

function of sales ops is tech selection and implementation for the sales team. But, sales ops also have their own specific tools that help them improve their unique job functions.

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## HOW TO CHOOSE THE RIGHT STACK

**Collaboration:** The first step towards choosing the right sales stack is to get both sales ops and sales together to create a unified vision of sales performance and functions. This vision will help guide you to the appropriate tech stack. Everyone should buy-in to the vision, and the sales stack should be built around this game plan.

**Prioritize:** Which tech should you implement first? Great question! Always start with tech that's most impactful to sales performance. You want to set up the core of your stack first and integrate add-ons later. Typically, this means starting with a CRM, team collab tools, and some automation tech.

**Mapping:** After you choose the implementation order based on performance, map out your timeline of tool adoption. You don't want to jam an entire tech stack into your sales teams workflows immediately. You should start with a few up-front, and slowly integrate additional tools.

**Get management buy-in:** Communicate the value of your chosen tech stack to C-level/shareholders. You want to develop the appropriate budget for implementation and discuss the cost of failing to implement the right stack.



## WHAT ARE THE MOST USED SALES OPS TECH TOOLS?

After tons of interviews with high performing sales ops and deep industry research, we're presenting the most widely used sales ops tech tools on the market. These tools are booming this year. But, that doesn't mean that they're the absolute best tools on the market for your unique needs.

Note: You may use tools that exist outside of the scope of this post. That's fine! Your sales stack should reflect your needs, and you don't have to jump onto the most popular tools simply because others are using them.

There are 10 primary sales ops tool categories.

- Account-based Sales and Marketing Tools
- CRM
- Analytics
- Communication
- Email
- Sales Intelligence
- Sales Engagement
- Contract Lifecycle Management
- Lead Gen
- Performance

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## ACCOUNT-BASED SALES AND MARKETING TOOLS

For sales ops leaders, winning large accounts is crucial. Account-based marketing is all about finding high-value clients, and rallying sales members around them. Account-based sales tools should allow you to track high-value accounts, deliver personalized messages to them, and leverage firmographics to develop accounts lists based on value.

This bleeds a little into BI tools — since reporting will help you determine lead value. But, account-based tools certainly deserve their own spot in your sales stack — and you should make sure they integrate with your CRM to avoid those nasty silos.

Top 3 Account-based Sales and Marketing tools on the market:

- LinkedIn Sales Navigator - Justin Kersey, VP of Sales at Merrill Corporation recommended LinkedIn Sales Navigator during Sales Ops Demystified Episode 2
- Terminus - Blends Sales Navigator with Salesloft insights
- Engagio - The most ABM-specific tool on the market, and it's quickly becoming an incredibly popular sales tool

### CRM

Your customer relations manager (or CRM) is the central hub for your entire stack. It's the brains. And, most of the tools you select post-CRM will be ad-hoc and definitely integrationready for your CRM of choice.

Let's get right to the elephant-in-the-room. Salesforce is the single most dominant sales platform on the planet. And, pretty much every sales team leverages Salesforce in some way. It's easiest to think of Salesforce as your base hub. All of these other tools we're talking about have Salesforce integration. And, you'll probably rely on Salesforce data (and the subsequent data pipelines from the rest of your stack) to make informed decisions.

Salesforce current has ~20% market share for CRMs, which is double its leading competitor. And, in a market so stuffed with CRMs, that's an impressive feat.

Top 3 CRMs on the market:

- Salesforce - Over 70% of sales ops leaders we interviewed used Salesforce, and there isn't another CRM that comes even close
- Zoho
- Pipedrive

## ANALYTICS

Data drives conversions. Your analytics tools are meant to be layered on top of your tech stack to deliver results through insight-driven analysis. There are plenty of tools that have analytics built-in. But, there are analytic-specific tools that most Sales Ops leaders leverage to stay ahead of the curve.

Top 3 Analytic tools on the market:

- Tableau - Jeffrey Serlin, VP of Sales Ops at Intercom recommended Tableau for sales ops forecasting and reporting on Sales Ops Demystified Episode 10
- InsightSquared - Nicholas Zorrilla, Senior Sales Ops Manager at Flashpoint recommended InsightSquared for reporting and analysis on Sales Ops Demystified episode 24, check it out here
- Domo - For larger scope analytics

## COMMUNICATION

Over 40% of salespeople say that the phone is their most important sales tool. Despite the sharp rise in tech, talking to a prospect one-on-one is still an essential part of capturing conversions. And, tech has made that process easier than ever. Not only do good communication tools give sales rapid outreach, but they can be leveraged in-house for better collaboration.

Top 3 Communication tools on the market:

- Skype - 55% of ALL businesses use Skype for Business internally
- Zoom - Joe Gates, Sales Ops Manager at Spendesk recommended Zoom for sales conferencing in Sales Ops Demystified Episode 11
- Slack - "We have Slack which is one of my favourites right now. Really cool collaboration tool, fast communication. It's a really powerful tool." - Katy Barth, Sales Ops Manager at Intralinks)

## EMAIL

McKinsey claims that email is 40x more effective than Twitter and Facebook. With all of these social platforms and unique digital spaces, it can be tempting to forget about email.

But, that would definitely be a mistake. It's still far-and-away the best lead gen tool at sales teams disposal. And, with a modern tech stack, you can track and automate your email campaigns like never before. This means less time spent typing and more time spent filtering lead quality.

Top 3 Email tools on the market

- Reply
- MixMax
- Ebsta

## SALES INTELLIGENCE

Sales intelligence vs. business intelligence... what's the difference? Sales intelligence refers to customer data only. And, BI is all about total business data stuffed into your warehouse. Sales intelligence tools help you navigate your customer data to make informed decisions about sales. Which prospects seem valuable? These tech tools can tell you.

Top 3 Sales Intelligence tools on the market:

- ZoomInfo
- DiscoverOrg - As recommended by Kelsi Hansen, Sales Ops Manager at Workfront during Sales Ops Demystified Episode 6
- Clearbit

## SALES ENGAGEMENT

Sales engagement tools are designed to make your team sell better. These tools help you set up an automated sales cycle that's consistent across devices and platforms.

Really, these tools are about hacking your sales processes and making them function as desired in today's fast-paced, tech-centric ecosystem.

Top 3 Sales Engagement tools on the market:

- Salesloft - Melinda Forest, Sales Ops at Decibel recommended Salesloft on Sales Ops Demystified Episode 26
- Gong - “Another major tool that we use is Gong, which does the call recording and a lot of analysis behind the scenes, a really fun tool, if you’ve never checked it out, it’s a lot of fun to see the data that they can pull from a conversation” — Jonathan Bunford, Director of Sales Ops at Ada
- Yesware

## CONTRACT LIFECYCLE MANAGEMENT

Again, sales ops is deeply involved in contract management. So, contract lifecycle management tools can help you chip away at the chains that bind the time of your reps. You want digital signatures, lots of document automation, good tracking and reporting software on document workflows. These are the tools to facilitate that.

Top 3 Contract Lifecycle Management tools on the market:

- DocuSign - Over 30% of our podcast guests utilize DocuSign
- HelloSign
- SpringCM

## LEAD GEN

What would a sales ops tech stack post be without talking about the big kid on the block, lead gen?

Lead Gen is the endgame. It’s where your marketing budget goes and it’s what your salespeople are always looking for. If sales was a plant, leads would be the water, sun, and air.

Top 2 Lead Gen tools on the market:

- Cognism
- Data Fox - Kelsi Hansen, Sales Ops Manager at Workfront recommended Data Fox during Sales Ops Demystified Episode 6

## PERFORMANCE

As a sales ops leader, you need to know how to motivate, entice, and manage the performance of your entire team. And, that can be tough without the right supporting tech.

- Which KPIs are most valuable?
  - How do you increase lead-based performance?
  - What kinds of metrics should you track?
- These tools give you the answers.

Top 3 Performance tools on the market:

- Ambition - Cris Santos, Head of Revenue Strategy and Operations at PluralSight recommended Ambition during Sales Ops Demystified Episode 19
- Hoopla
- QStream

## BI

Business Intelligence is the reason why data is valuable. It’s the magic element of your business that puts you “in-the-know” about everything going on. And, it can hack your entire sales process.

These tools literally give you insights into your entire business. And, since sales ops has a tight bond with C-level and shareholders, understanding business nuances outside and inside of sales is critical towards boosting performance, increasing engagement, capturing leads, and meeting business demands.

Without BI, you’re left in the dark.

Here are the premium BI tools that the sales ops professionals that appeared on our podcast are currently using:

Top 3 Performance tools on the market:

- PowerBI - Katy Barth, Sales Ops Manager at Intralinks recommended PowerBI for deeplevel business intelligence during Sales Ops Demystified Episode 19
- Sisense
- IBM Cognos Analytics

# CHAPTER 5 - HOW SHOULD SALES OPS DEAL WITH DATA QUALITY?



**Dante Hawkins**  
Director of Sales  
Operations at  
Springbot

Nowadays, data is a hot topic in the business world. Data is an invaluable resource for sales ops and organizations as a whole. However, data is only useful when it is of high quality, complete and accurate.

Bad data is inconsequential and costs the US economy approximately \$3.1 trillion annually. These costs include the time and effort spent correcting data and the costly mistakes that accompany bad data.

Collecting customer data using various channels allows sales ops to grow their contact list. However, you are not assured of high-quality data. Whether you get your customer data from phone surveys, point of sale interactions or contest entry forms, some data will be incomplete, inaccurate, and fraudulent.

Unfortunately, in most organizations, data quality is nobody's job. The marketing team focuses on lead acquisition while the sales team is submerged in closing deals.

In this chapter, we interviewed the most esteemed and experienced sales ops leaders to gain insights into how to deal with data quality. We combined their responses with current research on data quality in sales ops. 90% of sales ops leaders interviewed in our podcast say that data quality is a major challenge in their role.

Dante Hawkins, the Director of Sales Operations at Springbot affirms this truth. He declares, "I think this is probably one of the biggest challenges that I've actually seen across the board throughout different organizations. It's just one of those tough things, and it becomes exponentially difficult the larger that your organization gets."

Ensuring that an organization has the most accurate data can be tedious and overwhelming. Nevertheless, the benefits of data quality far outweigh the effort and time spent to maintain data quality.

High quality data:

- Helps you understand and stay in touch with customers
- Provides insights on current and potential customers
- Offers a competitive advantage. You can use quality data to your advantage to discover opportunities and anticipate customers' needs better than rivals. In his words, Cris Santos of Pluralsight contends, "data quality can be your differentiator in the marketplace in terms of getting the right insights out of the business. If the data is wrong, your conclusions are wrong as well"
- Increases sales ops efficiency and productivity because you don't have to spend much time fixing bad data
- Helps to make more informed decisions
- Allows you to market more effectively and close more deals. The more you know your customers, the better you can target and appeal to them
- Ensures compliance with laws and regulations on data. In industries such as finance, maintaining good quality data is the difference between compliance and non-compliance –culminating in millions of dollars in fines

Increases profitability because you can craft effective marketing campaigns and close more deals

If you are not convinced of the importance of data quality, your competitors are and will strive to beat you in this game.

Below are four incredible ways of dealing with data quality according to guest of Sales Ops Demystified:

## 1. TRAINING EMPLOYEES

One of our guests, Alan Kingsley Perkins of Kingsley Perkins Ltd contends that training is important when dealing with data quality. Training ensures that everyone in sales ops knows the importance of feeding accurate data to Salesforce. With adequate training, all sales reps will strive to input correct data to the system because, at the end of the day, they will benefit from it.



**Catherine Mandungu**  
The Director of Sales  
Operations at Ometria

Catherine Mandungu, the Director of Sales Operations at Ometria agrees that many organizations fail to educate employees on data quality, integrity and governance. Hence, most employees, including sales ops have limited information on data quality and its importance. In line with this, the sales ops team and other employees need



to be better informed on data quality and its implications. Kimberley Warman, Head of Sales Operations of Austin Fraser declares that vigorous training in data quality ensures that employees in an organization know what good data quality entails. Training should include proper documentation in the database, the importance of a good database and the implications of bad data. It can also be in the form of tracking problems in data quality and offering training to combat them.

## 2. INTERDEPARTMENTAL COLLABORATION



Nicholas Zorrilla  
Sales Operations  
Manager

Sales Operations Manager, Nicholas Zorrilla declares that data quality is a partnership between different departments in an organization. Sales ops, marketing, and customer success have to collaborate to guarantee data quality.



Cornelia Klose  
Global Sales  
Operations  
Manager at Mailjet

Cornelia Klose, Global Sales Operations Manager at Mailjet agrees with this saying other teams like marketing and customer success should not just pull data from the CRM but also help to enrich it. Kimberley Warman of Austin Fraser says that everyone in an organization from the finance team to legal and sales ops is responsible and accountable for data quality.

Catherine Mandungu professes that maintaining data quality is the obligation of everyone who uses the CRM, not just the sales ops team. Even with automation and integration of different CRM platforms, all employees in business should work towards attaining data quality. Salespersons, for example, have the obligation of updating clients' records. If a client moved companies or changed roles, the owner of the sale should make that amendment to maintain healthy data. Also, data input starts with salespersons, and hence, they have a significant role in data quality.

Salespeople are often sceptical of their involvement in ensuring data quality because they can't see its direct effect on their commission. However, data quality speeds the sales cycle by helping the marketing, accurate targeting, lead nurturing, and ultimately, conversion to sales. It's the cost of bad data on every team that makes it each worker's responsibility.



Jorge Moto  
Global Manager of Sales Operations &  
Salesforce at Ooyola



Melinda Forest  
Sales Operations Manager at Decibel

## 3. USING TOOLS

Sales ops can use tools to ensure data quality for a cleaner database. Dante Hawkins, Director of Sales Operations at Springbot professes that the right tools are fundamental to the solution.

For instance, Salesforce allows you to set rules, automation and boundaries that ensure certain data points are captured accurately.

Besides human errors during entry and outdated data, data duplication is a significant issue for many organizations. For example, two reps can enter one prospect twice in CRM because they obtained the lead from different sources. According to Jorge Moto, Global Manager of Sales Operations & Salesforce at Ooyola, his team uses different tools to handle duplicates and correlate processes. He explains that his organization acquired two companies recently and had to import substantial amounts of data.

However, most of the data not curated before being imported, results in increased legacy and duplicate challenges. Moto's sales ops team uses the duplicate management feature of Salesforce to ensure data quality and eradicate duplicates.

Melinda Forest, Sales Operations Manager at Decibel described that her sales ops team uses different tools to validate information on the CRM. She advocates for the consolidation of platforms to improve data quality. When different platforms are consolidated, sales ops are not toggling to see a HubSpot score, a Gainsight health indicator, or LinkedIn pages

## 4. ASSIGN SPECIFIC DATA QUALITY RESPONSIBILITIES

Cris Santos of Pluralsight says that a data quality owner can help with data quality. The data quality owner oversees the creation of accounts and the standards that should be adhered to in the process. A team can also be entrusted with data quality. An organization can also partner with a company that specializes in data quality for all data quality-related services ranging from data cleanup to data enrichment.

Catherine Mandungu, Director of Sales Operations at Ometria says that having a data control team – sales ops or another dedicated data control team - goes a long way in ensuring healthy data. The control team should be the champions and guardians of data quality. Nicholas Zorrilla contends that as a senior sales ops manager, he is accountable for making sure that data in the CRM is correct.

Jorge Moto of Ooyola, Global Sales Operations Manager and Salesforce Admin affirms that he does weekly audits to maintain data quality. In the audit, his sales ops team reviews all the data they have to ensure that it is accurate and matches with the contract.

Building specific data quality responsibilities and assigning someone to them ensures data accuracy and credibility. However, many organizations do not have that luxury. If you can't afford a dedicated data quality resource, you can give the obligation of data quality to the technology team. Alternatively, you can split up the obligation among various members in the admin center.

If you put rubbish in your CRM, you are assured of getting rubbish out. You may have the most effective and expensive CRM solution in the world, but if all users do not embrace it and utilize it correctly, there's a high probability you won't get any results.

The CRM is only as valuable as the data that sits within. Sales ops should strive to attain data quality and ensure that data is available, usable, reliable, relevant and of quality. Also, they should develop an organizational culture whereby everyone has the obligation of data quality in a bid to increase operational excellence and craft opportunities for connecting with quality leads.

# CHAPTER 6 - WHAT CHALLENGES MUST SALES OPS LEADERS OVERCOME TODAY?

Today, being a sales ops leader is not an easy task. You have many competing demands and have to devise ways to improve sales productivity, increase conversions and become a strong leader. With little or no training and development, sales ops leaders wonder where they can turn to for insightful tips to overcome challenges.

This chapter comes in handy to offer insights on the common challenges sales ops leaders face today and possible solutions. It is a collection of feedback from the most esteemed and experienced sales ops leaders on the planet today.

## 1. ALIGNMENT WITH OTHER DEPARTMENTS

Most guests interviewed in our podcast agree that alignment with other departments is the biggest challenge in their role today. According to Cris Santos of Pluralsight, being crossfunctional and cross-departmental is a challenge a sales ops leader. As a sales ops leader, you can't be siloed in your work, you have to work with people and departments that have different ways of thinking. You have to work with marketing, finance, product, and engineering departments.

Claire Maisonnave-Couterou, Sales Operations Manager at Kyriba agrees with this saying that sales ops teams experience great difficulties when engaging marketing, finance, and everyone else to engage in dialogue and get things done

## SOLUTION

In our podcast, Alan Kingsley professes that businesses should not work in silos. Instead, they should work in harmony and strive to attain common objectives. Departments should not have conflicting objectives that could take them in different directions.

You should schedule regular meetings with the other teams just like you do with the sales team. Ensure that you have common goals rather than distinct ones that focus on selling. Each team should have clear roles so that they don't overlap.

Aligning the sales team and the marketing team is never easy for sales managers.

However, that does not mean that you don't have to do it. Marketing and sales alignment is vital to business success. A pleasant relationship between sales and marketing is beneficial because it ensures that the sales pipeline is full of high-quality leads that the sales team works on and closes. Also, aligning sales and marketing with shared goals and metrics increases quota achievement by 25%, win rate by 15% and annual revenue growth by 32%.

## 2. MANAGING THE SALES TEAM

Jonathan Bunford  
The Director of Sales  
Operations at Ada



According to Jonathan Bunford, the Director of Sales Operations at Ada, managing a big sales team can be a challenge of a sales ops leader today. This is particularly true when you have to manage a sales ops team as well as the business development team.

In his words, Bunford contends "Right now I'm a oneman-show, and so it's a lot to manage in terms of making sure that all the teams feel that they're getting the attention that they ultimately need."

Dante Hawkins of Springbot concurs with this saying that managing the day to day tasks of sales ops as well as the sales team can be tough. He asserts that "it becomes tough especially since I'm more like a one-man army when it comes to the operation side of things."

As a sales leader, you have many responsibilities and have to work for long hours. Also, you have to ensure that your huge sales team is performing well and meets its quotas. Sales reps can be difficult to lead and you have to develop ways to motivate, coach and inspire them while ensuring they get results.

## SOLUTION

While managing a big sales team can be tiring and overwhelming, here are a few tips sales managers can use when feeling a bit frazzled;

Dealing with failure can be hard for any leader. In such occasions, it's advisable to look back at past successes and remind yourself of your worth.

When you can, take breaks to recharge. This increases your productivity as a sales manager and salesperson

## 3. RECRUITING SALES REPS

Many sales leaders struggle to recruit the sales reps with the right combination of expertise and skills. They end up hiring the wrong sales reps. Hiring the wrong people can ruin your team, company, and career. Low staff morale, high turnover rates, and low productivity are prominent results of a poor hiring decision.

In our podcast, Alan Kingsley Perkins, the Sales Operations and Business Consultant at Kingsley-Perkins Ltd, affirms that when you hire the wrong people for your sales team, it can compound existing problems. The onboarding process is affected as well as your team and company's performance and ultimately you get high turnover rates.

In addition to hiring the wrong salespeople, sales ops leaders face the challenge of retaining their top talent. In fact, the Harvard Business Review reports that the average annual turnover in sales is approximately 25-30%. You may be excellent at hiring the right people but if you can't retain them, it is worthless. You should learn how to hire top talent as well as retain them so that they benefit your team and firm.

Losing your top performers to competitors can be devastating and affect your team's performance. Let's consider the main reasons sales reps quit their jobs:

- Poor management: many salespersons do not quit their jobs, they quit their bosses or managers. When a sales rep cannot keep up with his boss - whether because of micromanagement or something else, they consider quitting their job in search of better management
- Compensation: a salesperson may quit their job because of poor pay or a drastic change in their compensation structure
- Lack of growth: without growth opportunities, sales reps look for jobs that offer them career and skill set growth

## SOLUTION

Hiring the right sales team is an opportunity to leave your stamp on your team and improve its performance. You need to evaluate a candidate well before hiring him. A potential candidate should have the right combination of skills and expertise.

Katysca Barth of Intralinks believes that a great salesperson should have the right balance of analytics, business mindset, and business acumen. Such a balance ensures that a sales rep understands clients, what it takes to win a deal, and what's going on in business.



## 4. IMPROVING PRODUCTIVITY

Many sales ops leaders struggle with improving the overall productivity of their teams in order to bring more business to the organization.

This is amidst intense pressure for leaders to increase the productivity of their teams and surpass their quota.

It has been found that sales managers do not offer sales reps the necessary technological tools to assist them in their roles. In many cases, managers are confused and overwhelmed by the many technology options available in the market.

### SOLUTION

Nicholas Zorrilla, Sales Operations Analyst at Flashpoint contends that he improves the productivity of her sales reps through simplification. Simpler processes make things easy for sales reps and management.

Natasha Neller, Sales Operations Manager at Austin Fraser contends that sales tools like Bullhorn (in the recruitment space) go a long way in improving the productivity of sales teams. Before settling for tools and technologies, you must assess your team and its selling requirements.

Other tips for improving the productivity of your team include;

- You can't achieve maximum sales productivity without a great sales team. Focus on hiring top talent
- Invest in onboarding and training because it lays the foundation for a great sales team
- Automate the sales process to save time and resources spent on unproductive and repetitive tasks
- Measure productivity and performance metrics such as call rate, win rate, sales cycle length, and pipeline conversion rate

## 5. SALES COACHING

Coaching is one of the biggest challenges sales ops leaders face today especially new sales ops leaders. Sales ops leaders have so many responsibilities that it becomes easy to neglect to coach their reps. They spend most time setting goals, reviewing sales numbers and analyzing data.

Many sales managers fail to coach their teams on how to tackle different selling challenges and individual issues. This leads to half-baked salespersons that cannot sell effectively.

Jonny Day, Head of Sales Ops at Crowdcube affirms that it is important to support sales teams. One way of supporting sales reps is listening to their day-to-day challenges and identifying ways to solve them. For instance, ask yourself if technology can solve these challenges. Go a step further to offer them tools that make their work easier and help them scale and grow

### SOLUTION

Coaching sales team may feel like a time-consuming and never-ending process. However, sales managers should make it a priority.

Coaching does not have a one size fits all approach. You have to customize the coaching to fit the individual sales reps needs. Know the motivation and challenges of each rep and take it from there.

Below are some coaching best practices to maximize your team's performance

- Although it is good to help your sales team, it is essential to encourage them to be independent so that they learn to face challenges
- Set an example. Whatever qualities you want to see in your sales team, you must model them
- Provide effective training. Training is important in any salesperson's career life. Ensure that your sales team undergoes ongoing training to sharpen their selling skills. Also, give them feedback- praise and constructive criticism to improve their skills

Being a sales ops leader is one of the most challenging positions in an enterprise. As a sales ops leader, you have to wear many hats from coordinating the sales team to setting goals and serving as the bridge between sales and top management and other departments.

However, just because this position is demanding does not mean you cannot excel in it. With the right attitude and technology, you can generate amazing results and propel your sales ops to great heights.

# CHAPTER 7- WHAT ARE THE MOST EFFECTIVE SALES METRICS?

While many professionals complain of too little data, sales teams are not among them. Too much information is a considerable problem for sales managers and their reps.

With advances in technology and the latest tools, you can measure almost anything ranging from retention rates to percentage of reps using CRM, sales velocity, and the average time to hire. The metrics to track are endless.

Although having too much data and many metrics to track may seem like a good thing, it can be daunting and overwhelming to monitor everything. When data overwhelms you, you can't analyze and interpret data for decision-making. So what would be the best solution for sales ops? It's simple; narrow your focus and track the most important and effective metrics only.

With a few important metrics to track, you can easily and quickly understand trends in sales and their importance.

Determine whether sales ops achieve their goals with the right metrics. If a metric does not meet the set range, it means that the team is underperforming. If the metric's outcome falls above the range, the sales team is achieving its goals.

Measure performance: the primary reason for evaluating metrics is to measure the performance of sales ops. Metrics reveal whether the sales team is doing well or not.

Inform decision-making: metrics help sales managers and other leaders to make decisions about the sales team and organization as a whole.

Unleash improvements: you can't improve what you can't measure. Performance metrics help to identify areas in sales that need improvements to perform optimally. For example, if a business is recording a decline in revenue over time, metrics help you identify what would be going wrong and address the issue.

## EFFECTIVE SALES METRICS

The right metrics to track depend on your industry and business. Below are six metrics that are effective across the board.



Rory Brown  
The co-founder and CCO of  
Kluster Intelligence

### 1. REVENUE

It is the most critical KPI in sales ops. In our podcast, Rory Brown, the co-founder, and CCO of Kluster Intelligence agrees that revenue is among the core metrics that sales ops should be judged on.. If you are a subscription business, for example, you calculate your revenue based on the monthly recurring revenue (MRR) and annual recurring revenue (ARR).

For example, as an internet provider your customers subscribe to packages. Currently, you have 80 customers who pay an average of \$40 monthly. This makes your MRR \$3,200 while your ARR is \$38,400.

You can break down your revenue to determine:

- Percentage of new business: customers who are buying from you for the first time. Maybe a new customer who just subscribed for your internet package
- Percentage of upsell/cross-sell: existing customers who are purchasing another product or upgrading to a higher package. For instance, your internet packages are divided into silver, gold, and platinum, with platinum being the highest package. If a customer moves from a silver package to a platinum package, this customer would be an upsell
- Percentage of renewals: customers renewing their subscriptions monthly, quarterly, or annually

The percentage to focus on more will depend on your business goals. If your churn rates are high, you may want to improve customer retention and hence increase the percentage of renewals.

As you concentrate on one percentage, don't neglect the other percentages as they are equally important. They all contribute to your revenue.

### 2. PERCENTAGE AGAINST THE TARGET

In our podcast, Jay Khiroya, Head of Operations at Doctify, affirms that the single most important metric he uses to measure the performance of his sales team is percentage against the target. Every sales team has its quota or target

Depending on your business and industry, your target may be represented as revenue, units sold, number of accounts, or other relevant measures. The target attainment – the percentage of reps meeting or exceeding the target- gives you invaluable insights on the quota.

If less than 60% of your sales reps are hitting the target, then it is probable that the quota is unrealistic. This is also an indication that you need to hire better performing reps and fire the underperforming reps. Also, you should examine your sales compensation plan to see whether it gives your team the motivation to sell.

On the other hand, if 90-100% of your reps are hitting or exceeding the quota, you need to review your quota and probably increase your targets. Khiroya contends that the percentage against target can be used to help salespersons to improve because you can identify their weaknesses in the funnel.

### 3. FORECASTING ACCURACY

Kirsty Charlton  
Head of Sales  
Operations in Signal AI



According to Kirsty Charlton, Head of Sales Operations in Signal AI, forecasting accuracy is an important metric in sales ops. In our podcast, she contends that forecasting accuracy shows that your reps have control of the sales process and know where to focus. They know quality leads when they see them and can focus on them with a guarantee of conversion.

Forecasting accuracy improves the productivity and efficiency of sales reps. They do not waste time and resources on unready and poor leads. As a metric, forecasting accuracy helps you make proactive, informed, and intelligent decisions on your sales process. You can plan to leverage any opportunities that come your way.

Regrettably, research conducted by SiriusDecisions revealed that 79% of sales teams miss their sales forecasts by 10% or more. Although accurate sales forecasting may seem like an impossible dream, it is possible.

One way of improving forecasting accuracy is holding reps accountable for their forecasts. You can require reps to write their own forecasts so that they are honest about the content in their pipeline. You can offer incentives for forecasting accuracy.

## 4. AVERAGE DEAL SIZE

You may be asking how do you calculate the average deal size? You simply divide the total number of deals your team has by the total dollar amount of the deals. When you calculate the average deal size on a monthly, quarterly, and annual basis, you get insights on the size of your contracts. You can know whether your contracts are becoming larger, smaller, or remaining the same.

You judge the average deal size with your business goals. If you are targeting small and medium-sized businesses, your deal size should decrease, but your revenue and number of clients should increase. If you want to move upmarket, your average deal size should increase.

The average deal size sheds light on risk deals. For example, if a salesperson is following a deal that is four times your average deal size the likelihood of the deal being risky is high. This is mainly because the probability of closure is low, and the sales process will be lengthy. The salesperson may also be putting all his quota eggs in one basket.

As you assess the average deal size, look out for reps that have a lower deal size than the team's average. This may mean that they are targeting the low hanging fruit and need to target large customers with bigger deals.

## 5. CONVERSION RATE

Rory Brown, Chief Commercial Office at Kluster Intelligence suggests that conversion rates are a crucial metric in sales. Conversion rate is the percentage of leads that convert into customers. For example, if you get 200 leads every month and an average of 100 buy your products, your conversion rate is 50%.

The conversion rate can help you calculate the number of leads you need to hit your revenue target. For instance, if your monthly quota is \$500,000, and your average deal size is \$5,000, your reps need to close 100 deals to meet the target. If only 50% of your leads convert to customers, then you need 200 leads each month to meet your target

## 6. SALES FUNNEL LEAKAGE

Imagine this. Your reps get 200 leads monthly, but only 20% of them convert to paying customers. What happens to the remaining 80%?

This situation reveals that your sales funnel may have a leakage. That is why it is essential to measure sales funnel leakage to determine where most of your prospects drop out of the funnel and what can be done to remedy it.

To establish the leaky points in your funnel, you have to monitor the conversion rates in each stage of the funnel. For instance, if 50 prospects agreed to a discovery call, 20 reach the demo stage, and only 5 make a purchase, the steep drop in every phase of the funnel indicates something is wrong.

Many things may be the culprit, including not qualifying leads well, bad demos, and poor negotiation. You have to find and improve on the leakage areas for the best results.

You can study the historical conversion rates of your team to determine their efficiency. The trend in your salespersons' conversion rates tells you whether they are becoming effective or not. For example, if your sales reps conversion rate is increasing and the quantity of deals is the same or bigger, then their performance is improving.

On the contrary, if the conversion rate is decreasing and maybe the quantity of deals is the same or decreasing, then their performance is not good, and something is wrong somewhere.

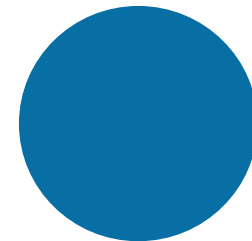
There is a plethora of metrics that sales managers and leaders can use to evaluate the performance of sales ops. While many metrics are becoming outdated and new ones replacing them, it can be overwhelming to choose the effective metrics to monitor.

In summary, this chapter offers six important and effective sales metrics to help you optimize your sales performance.

## CONCLUSION - TOM HUNT, HEAD OF MARKETING @ EBSTA

The culmination of my knowledge seeking of the past 6 months: over 1,000 minutes of interviews with 30 distinguished sales ops leaders. We will continue to seek out the best and most forward thinking sales ops experts and will bring you their insights as part of Sales Ops Demystified. In the meantime, if you would like to learn more about how sales ops professionals are using Ebsta to:

- Make their sales reps more productive
- Produce reports sharing the true engagement of prospects and customers
- Drastically increase Salesforce adoption and improve data quality



**THEN PLEASE CLICK HERE  
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## Site Usage

7,649 Visits

25,423 Pageviews

3.32 Pages/Visit

43.64% Bounce Rate

00:04:08 Avg. Time on Site

28.30% % New Visits

## Traffic Sources Overview



■ Direct Traffic  
3,097.00 (40.49%)  
■ Search Engines  
2,910.00 (38.04%)  
■ Referring Sites  
1,642.00 (21.47%)

## Map Overlay



## Visitors Overview



Visitors  
2,958

## Content Overview

Pages	Pageviews	%
/	5,932	
/information-privacy	3,306	
/decisions	867	
/information-privacy	697	
/information-privacy-guidelines	692	



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