A COMPLETE GUIDE TO:

DATA-DRIVEN STRATEGIES FOR RAMPING NEW SALES REPS

setsail

With remote selling, ramping new sales reps becomes a bigger challenge

Sales is now from-home, digital, and virtual.

Revenue organizations are going through the biggest shift of our lifetime. Every aspect of managing business is moving remote. Inside sales is becoming inside-home-sales and field sales is becoming field-home-sales. All customer interactions are online; sales coaching and deal debriefing are harder then ever.

It's not clear if we will ever go back to normal. This shift is here to stay.

Traditional approaches to onboarding are ineffective.

With no war rooms and face-to-face coaching, onboarding new sales reps takes longer than before. Even with existing reps, 48% say they are less productive than they used to be. No amount of content and zoom calls are able to remedy the distracted, disconnected environment in which reps now have to learn to sell into a new business and buyer.

It is time we shift from the art of selling to the science of selling.

6-8
Months
to ramp

Sales Onboarding in 2020

The new normal demands a new approach to onboarding

FROM

Content-Focused Onboarding

| 01 HIRE | 02 TRAIN | 03 HOPE | ? |

- ✗ Treats ramp like **individual sport**
- ✗ Responsibility is put on the **sales representatives**
- ✗ Creates a **single point** of failure
- ✗ It's **too late** when you find out a rep failed to launch

VS

TO

Data-Driven Ramping

HIRE — TRAIN — OBSERVE — COACH

- ✓ Treats ramp like **team sports**
- ✓ Responsibility is **shared** with management
- ✓ **Reduces the risk** of failure
- ✓ You can **act quickly, proactively**

Faster Ramp

Higher Completion Rates

Better Org Learning

Breaking sales ramping into small and impactful steps

Sales has always been an all or nothing game. Our entire sales machine is built to reward reps once they cross that finish line. And yet, most of our reps never do. Today, 20% of sales reps drive 80% of your revenue. It means only **2 out of 10 of your new sales reps will ever fully ramp and achieve success**.

The reality is the big sale doesn't just happen by itself. **Behind every success is a series of small wins along the way**, each building on the other, ultimately resulting in sealing the deal. Those small steps are what make the big ones possible.

With the shift to digital, we have an opportunity to build sales around the micro-steps that actually drives sales.

SetSail enables your new reps one small step at a time. By analyzing all sales interaction data, SetSail first uncovers key signals that lead to a sale. Then, it **incentivizes your team to achieve each incremental win**, instead of rewarding them only once the sale is made.

> " It's easy for reps today to say "I closed 3 big sales this quarter" - it masks the activity that usually happened-
>
> we need to **do the right activities throughout the sales process** - we need to **manage the small steps**"
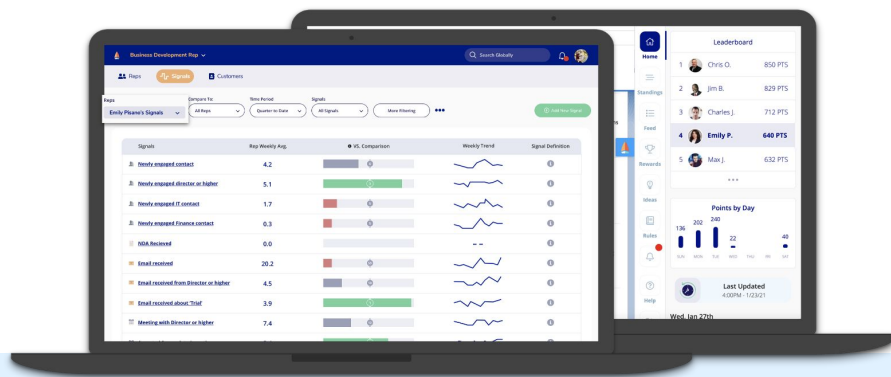
Scott Allison, VP of Sales

SentryOne®

What is Data-Driven Ramping for Sales?

Track and reward reps for _meaningful_ activity that gets to growth.

Today the early activity is largely undefined, and rewards come at the end when booked. How do you take the habits of your best reps and get your new reps to start them from day 1? And what is the $ value of doing that?

SetSail's AI-powered micro-incentives Platform is a new way to reduce ramp time of new hires by focusing them on _high-impact ramp activities_.

- **Reduce ramp time by 25-50%**
  - Secure faster bookings
  - Impact growth rates
- **Increase business focus of new reps**
  - Drive new business
  - Re-align on new territory
  - Cover whitespace faster

"Data-Driven Ramping" is a 360 approach to new hire success

#1 BUILD COMPETENCE

- **Knowledge** (understand product, use cases, etc.
- **Skills** (learn the pitch, discovery, and demo)
- **Process** (know how to create pipeline, use tools, etc.

#2 BUILD CONFIDENCE

- Internal mock demos, discovery calls, etc.
- Add new reps to round robin lead queue
- Process a simple transaction (renewal, upsell)

#3 BE DATA-DRIVEN

- Collect evidence of competence and confidence (signals)
- Focus ramping reps on *meaningful* activity (best practices)
- Coach based on leading indicators (small wins)

Move from measuring <u>activity</u> to measuring <u>customer engagement</u>

Time-based

Act faster

☑ Follow-up email sent within 1 day of meeting

☑ 3rd engaged contact in quarter

☑ Get a response from VP on pricing in 7 days (NLP)

Mile-stone

Reach a milestone

☑ 1st Active Director+

☑ NDA Signed

☑ Multi-threading milestones

Cover-age

Touch more accounts

☑ Meet with at least 50% of book in-quarter

☑ Receive emails from 30% of the target account list

Core

Do the basics

☑ Meetings completed with VP+

☑ Contacts newly engaged (the right persona)

The data you track needs to adapt to different reps and deal types

Use cases

Ramp new Enterprise AEs selling a complex product to drive new business

Enable new mid-market AEs selling high-velocity add-on products and transactional deals

Increase BDR productivity with high quality reach and deal prospecting

Deal types

✓ High velocity sales   ✓ Complex enterprise sales

Sales teams

✓ Mid-market   ✓ Enterprise   ✓ BDRs   ✓ CSMs

> " *This new approach is instrumental in providing the **baseline motivation for new sales reps**.*
>
> ***It's like a second manager that amplifies their efforts** and gives them a "jetpack" by giving managers the ability to provide more effective coaching.*

Dean Patton,
CRO, SetSail

The benefits of Data-Driven Ramping for your teams

Proactive
Shift focus from lagging activity metrics to leading indicators of success that drive real results.

Positive
Reinforce positive behaviors that drive personal growth and build consistent habits

Customer-first
Reward and reinforce only actions that drive positive customer response, not volumes of rep activity.

Engaging
Drive daily engagements and transparency through competition and weekly rewards for top reps

Automated
Move beyond dashboards and effectively turn insights into measurable, controllable action.

Transparent
Reverse-engineer actions and behaviors of top sales reps for the entire team to observe and learn

Reps are encouraged to drive small wins to land their 1st win faster

- With SetSail
- Without SetSail

WIN RATE

50%
40%
30%
20%
10%
0%

5+ SIGNALS
4 SIGNALS
3 SIGNALS
2 SIGNALS
1 SIGNAL
1 SIGNAL
2 SIGNALS
3 SIGNALS
4 SIGNALS
5+ SIGNALS

20   30   40   50

DAYS

You can implement Data-Driven Ramping in 6 steps

Your Weekly Program in Just 6 Steps

Step 1: Define the nature of your business and focus:
- ❑ Deal types
- ❑ Rep groups
- ❑ Business objectives

Step 2: Select business objectives:
- ❑ Early pipe building activity (relevant to new business)
- ❑ Inherited deal acceleration (when transitioning accounts)
- ❑ Relationship & expansion (for cross-sell/upsell to existing business)

Step 3: Select top 5-10 signals
Step 4: Build and launch the program
Step 5: Reward and reinforce reps weekly
Step 6: Measure results and refine rewards

Points Structure

5-10 signals
- ❑ Include weekly engagement signals
- ❑ 1 multiplier for target customer segment

Distribute the points
- ❑ 1 @ 10 points
- ❑ 2 @ 20 points
- ❑ 1 @ 40 points
- ❑ 1 @ 50 points

Rewards Structure

3-5% of OTE
30-50% 'in the money'
Distribute the prize value
- ❑ 5 winners (AE/BDR)
- ❑ E.g $250/$125

Experience the power of data-driven ramping with SetSail
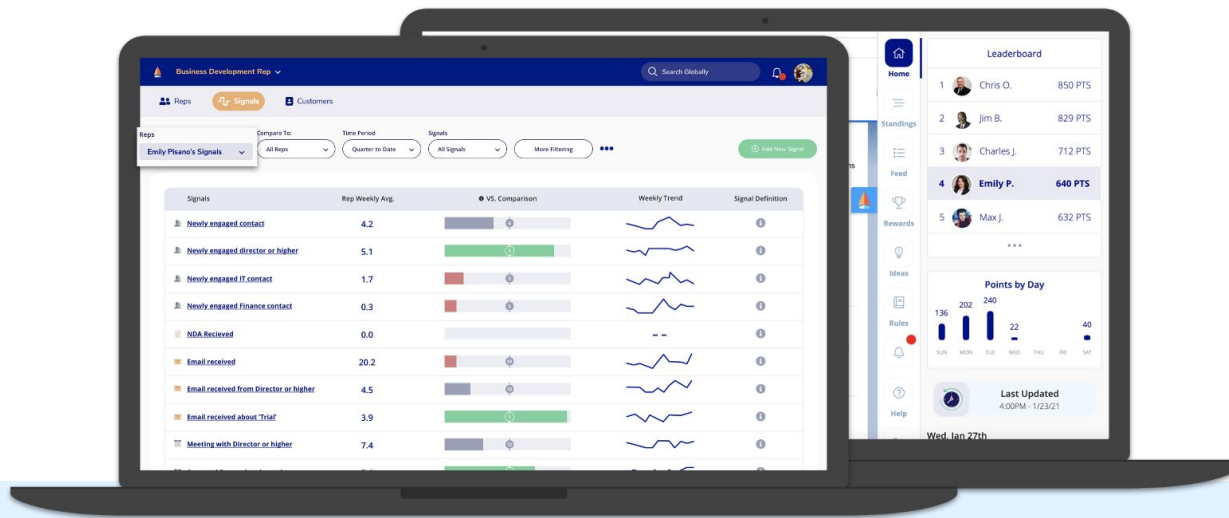
Take a tour →

About SetSail

SetSail is a complete data-to-action **Revenue Execution Platform** for all customer teams.

The SetSail Platform unifies all customer interactions, uses AI to identify and track key buying signals, and incentivizes teams to act on those signals through automated sales programs.

Getting started: Launch accelerated ramp program in just 4 weeks

Support and Success Services

- Strategy and signal selection
- Setup and training
- Weekly progress reports
- Data integrations
- Access to raw data and AI teams
- Executive results presentation

Kick-off	Integration	Discovery	Launch	Impact
Week 1	**Week 2**	**Week 3**	**Week 4**	**Results**
Kick-off project planning Group scopes	CRM Calendar Email, etc.	Wins discovery Data analysis Program setup	Pre-launch training Launch comms Announcement	**Weekly reports Exec briefings & refinement**

Thank You