# BECOME AN INBOUND SALES NINJA: ONE TEAM'S ULTIMATE PLAYBOOK FOR SUCCESS WITH HUBSPOT SALES HUB

NICK SALVATORIELLO IMPACT, HUBSPOT'S 2017 AGENCY PARTNER OF THE YEAR

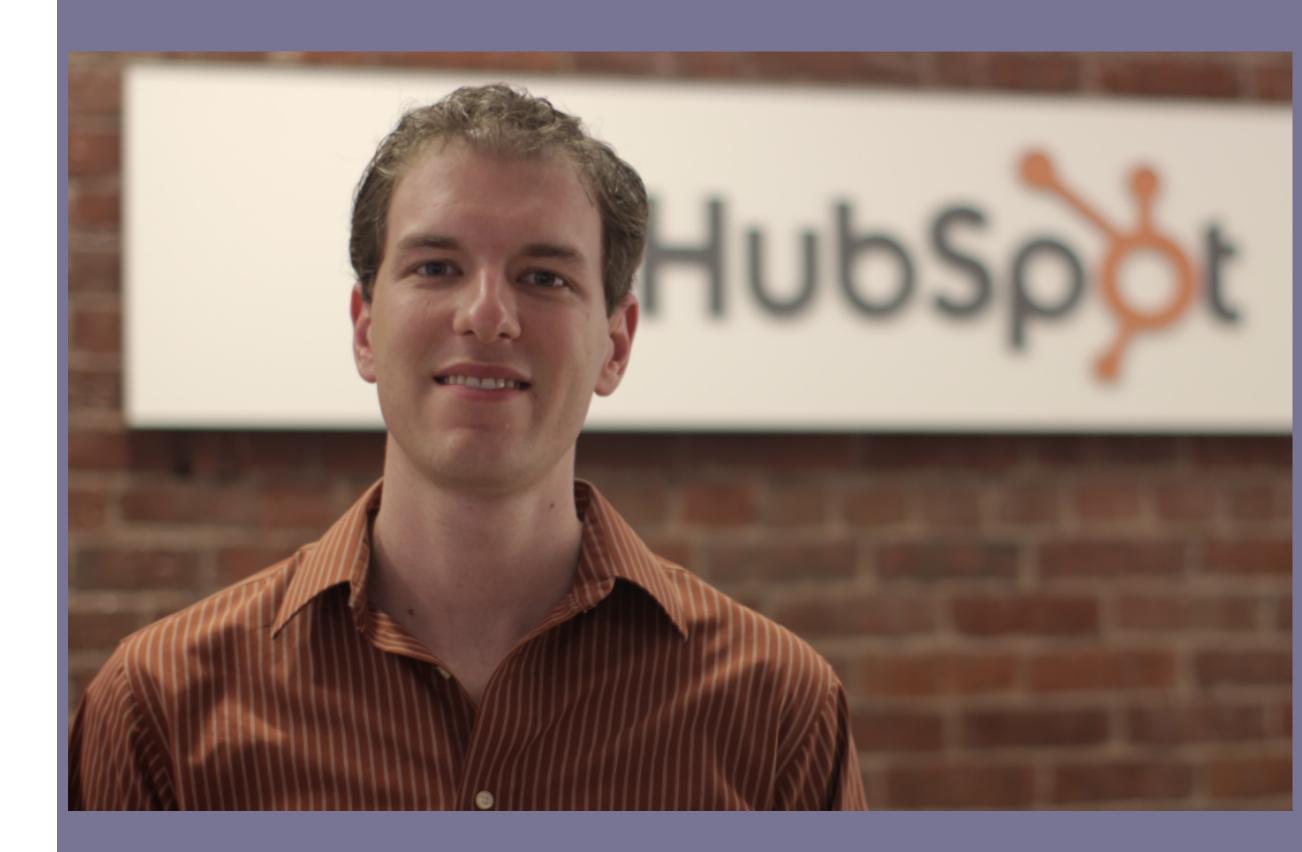


# HI I'M NICK SAL NICE TO MEET YOU!

#### **MY BACKGROUND**

- 7th year attending INBOUND
- 4.5 years on the team at HubSpot Inc.
   (April 2011- November 2015)
- 3rd time hosting a break-out session at INBOUND
- 2nd year working full time on a sales team using HubSpot Sales Hub

# THANK YOU FOR JOINING ME TODAY!



### THIS IS THE 1 NOTE YOU MUST CAPTURE TODAY:

# Visit **IMPACTBND.COM/NINJA** to get the deck, all resources, and keep in touch

# **BREAKING DOWN THE TOPIC:**

BECOME AN INBOUND SALES NINJA: ONE TEAM'S ULTIMATE PLAYBOOK FOR SUCCESS WITH HUBSPOT SALES HUB

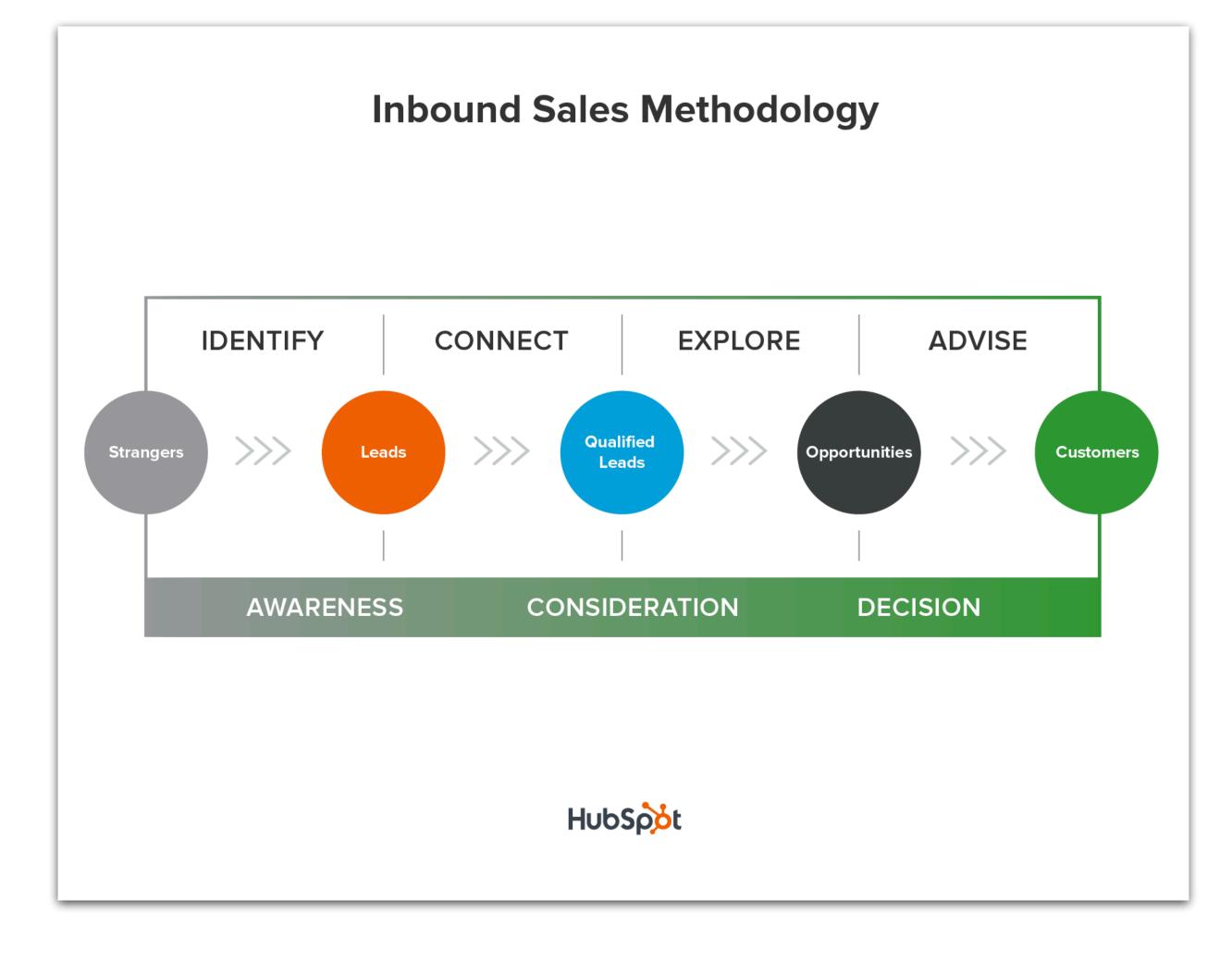
#### ✓ INBOUND SALES NINJA?

#### ✓ ULTIMATE PLAYBOOK?

 $\checkmark$  ONE TEAM?

✓ HUBSPOT SALES HUB?

# WHAT DOES INBOUND SALES MEAN?



## WHO HERE IS "IN SALES"?

### WHAT DOES INBOUND SALES MEAN? ASK MY BOSS, IMPACT'S FIRST HEAD OF SALES:



- "Inbound Selling or Sales (to me) is the art of guiding a
- prospect through a **personalized** buying journey on their
- terms while further educating and challenging them to
- make the **best decision for them** and their organization."
- -Tom DiScipio, Chief Revenue Officer and Partner, IMPACT



### WHAT DOES INBOUND SALES MEAN? ASK HUBSPOT'S FIRST HEAD OF SALES:

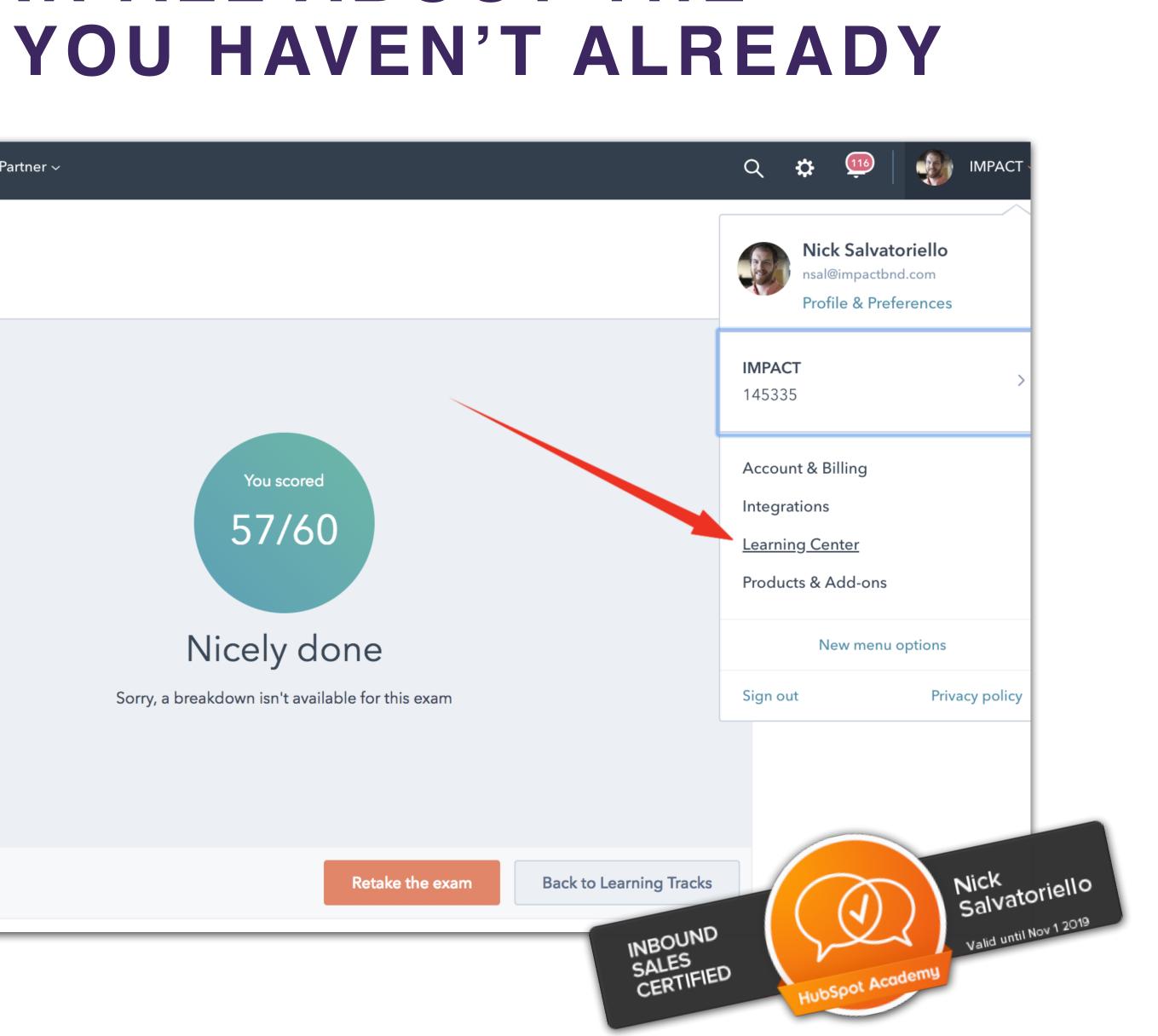


- "Inbound salespeople focus on their prospect's pain
- points, act as a trusted consultant, and adapt their
- sales process to the buyer journey."
- -Mark Roberge
- HubSpot's first rep and former VP of Sales
- Inbound Sales: How to Sell the Way Prospects Buy



# YOU CAN LEARN ALL ABOUT THE FUNDAMENTALS IF YOU HAVEN'T ALREADY

<u>مر</u>	Contacts $\sim$	Conversations $\sim$	Marketing $\sim$	Sales $\sim$	Service ~	Automation $\sim$	Reports ~
	Back to tracks	Sales					
Vid	ound Sales Cert eo ninutes		~~				
>	Inbound S Fundamer 2 Videos   Total 1	ntals					
>	Prioritizin ers Over F Buyers 5 Videos   Total 2		-				
>	of Today's Buyer	e Attention Empowered	I				
	4 Videos   Total 3	31:37					





# WHAT DO WE MEAN BY **BEING A 'NINJA' AT IT?**

- Not like a clown with novelty gadgets and "look at me! Look what I can do!"
- When done well, your craft is unnoticeable it's that natural.

YOU'RE PRACTICED + SUBTLE:

- Practicing and preparing over time.
- Your weapons, techniques are hidden.



## ASK OUR SALES COACH: **"THE ART OF SALESMANSHIP IS THE <u>ABSENCE</u> OF** SALESMANSHIP."

-Jack Carrol of SalesLinks.com



# **KEY RESOURCES**

#### AS A TEAM, WE CONSUMED ALL THESE RESOURCES IN YEAR 1

#### They Ask You Answer:

Why you want it: A really easy to follow guide on inbound sales/content marketing by the most successful HubSpotter l've ever met.

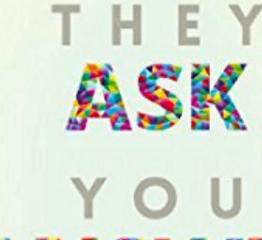
#### **The Challenger Sale:**

Why you want it: It's a guide for reps and managers to be better teachers/advisors in sales.

#### **The Ultimate Sales Machine:**

Why you want it: Bring all you've learned about marketing and sales together in a complete guide that is VERY inboundy.

#### MARCUS SHERIDAN ORIWORD BY KRISTA KOTRU





A REVOLUTIONARY APPROACH TO INBOUND SALES. CONTENT MARKETING. AND TODAY'S DIGITAL CONSUMER

MATTHEW DIXON and BRI

The Ultimate Sales Machine

#### The CHALLENGER

Taking Control of the

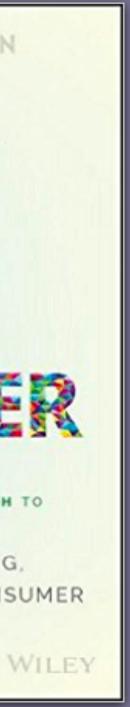
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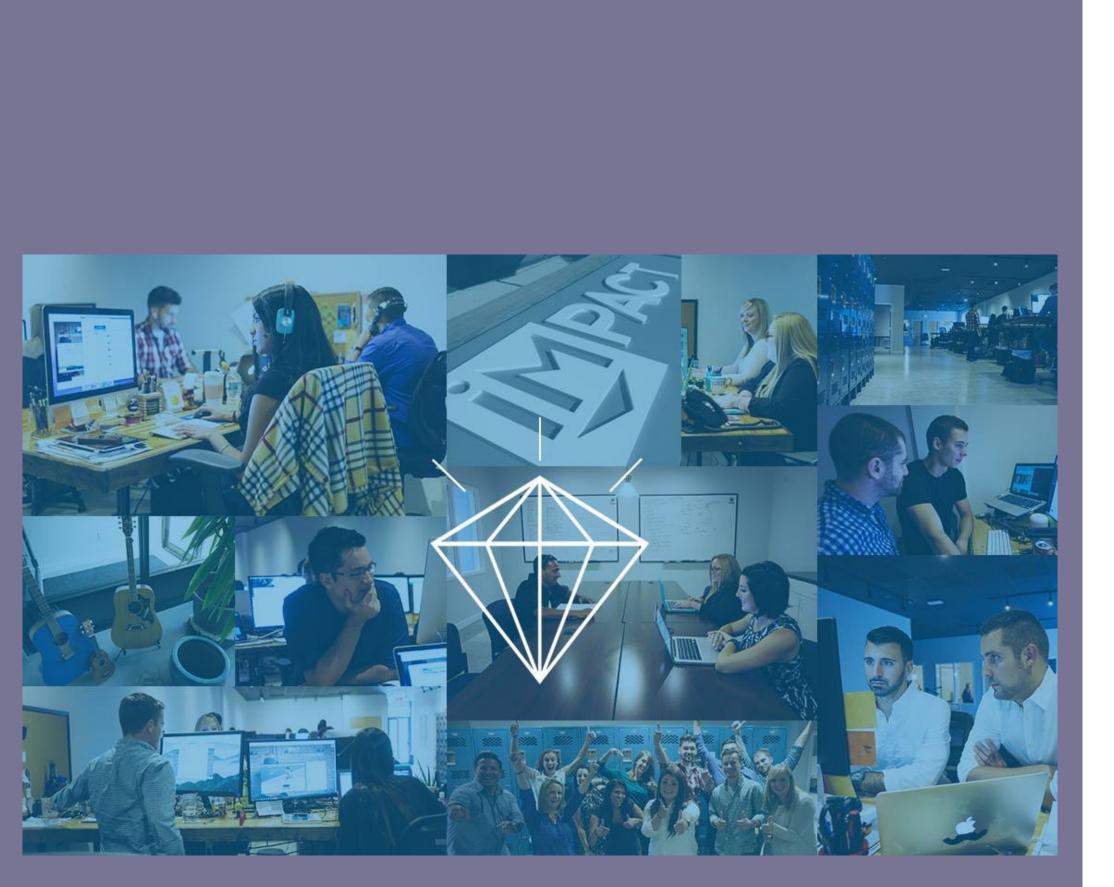
'The most important advance in selling for many years."

Turbocharge Your Business with **Relentless Focus on 12 Key Strategies** 

#### CHET HOLMES

Foreword by Michael Gerber, author of The E-Myth Note to the reader by Jay Conrad Levinson, author of the Guerrilla Marketing series





WHAT DO WE MEAN BY **'ONE TEAM'?** THIS IS WHAT IMPACT DID, GIVEN OUR SITUATION, BUT IT'S PROBABLY NOT THAT DIFFERENT FROM YOURS....

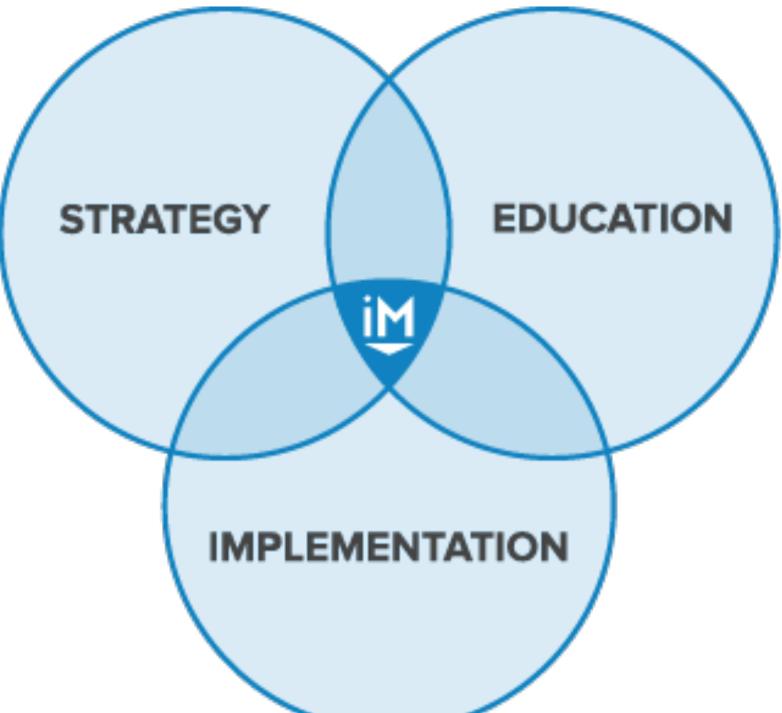


#### **Other vital stats:**

 60+ full time staff members ranging from inbound strategists, trainers, marketers, designers, developers

- 50+ organizations currently retain us as their 'go-to' agency and resource for all things inbound
- Retainer clients invest an average of \$85k/year with us
- Retainer clients work with us for an average of 2 years

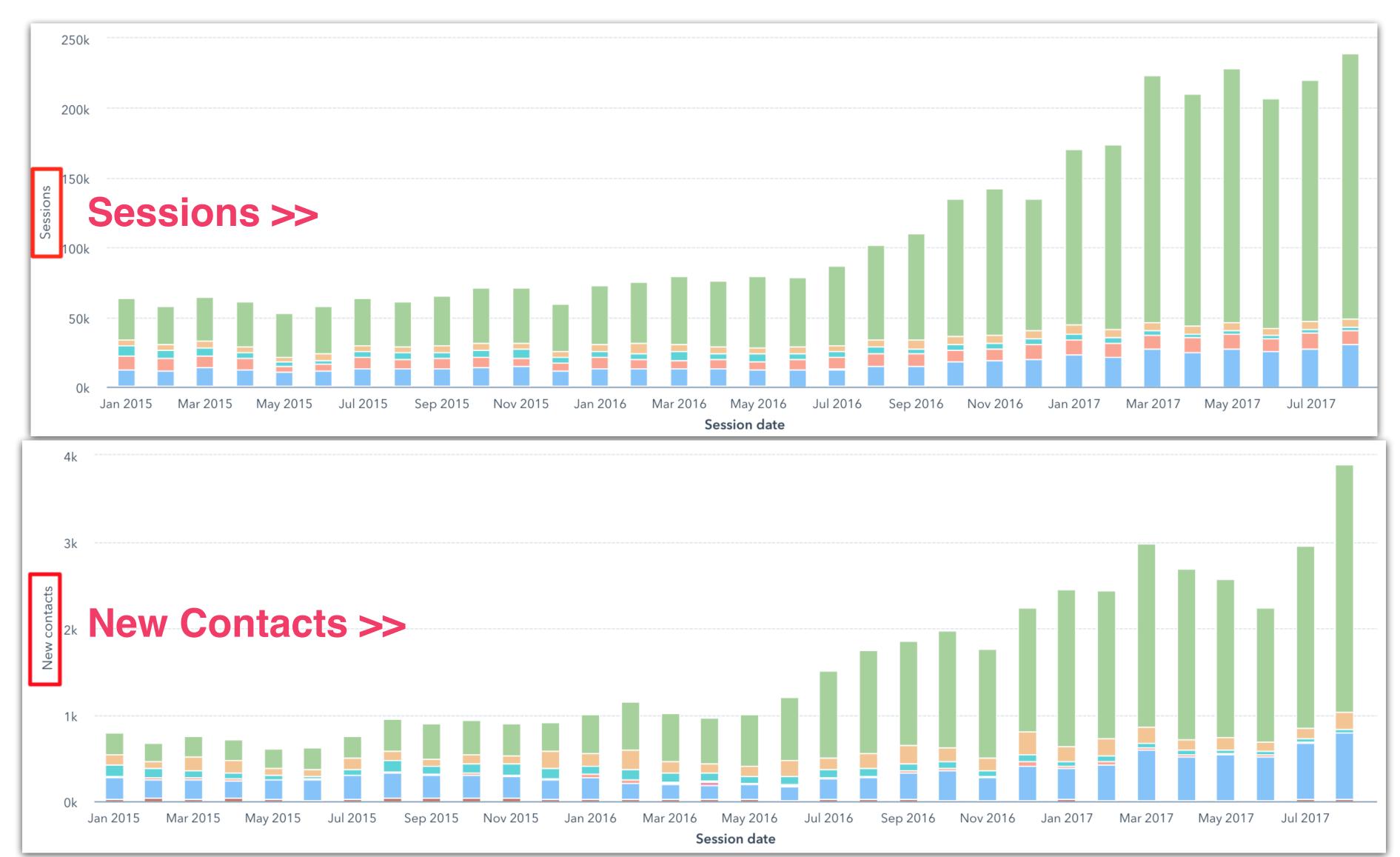




# WHAT WAS IMPACT'S SITUATION?

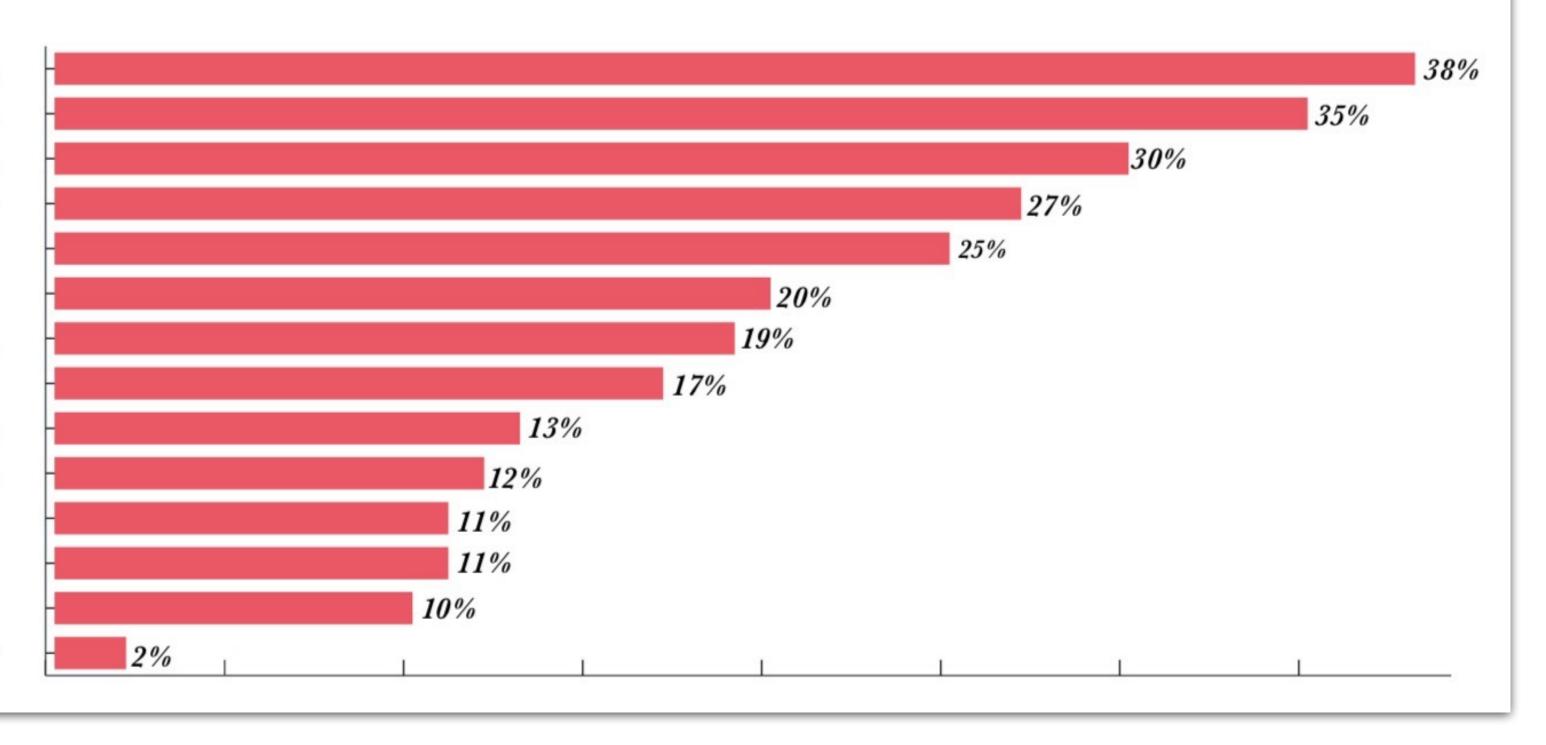
# REAPING THE REWARDS FROM CONSISTENT

# INVESTMENT IN INBOUND/CONTENT MARKETING



# SALES STILL HAS ITS CHALLENGES...

Getting a response from prospects Closing deals Identifying/prospecting good leads Engaging multiple decision makers at a company Avoiding discounting/negotiation Connecting via phone Incorporating social media into the sales process Connecting via email Using sales technologies Sourcing referrals Researching before initial call/email Keeping someone on the phone Delivering a presentation Other

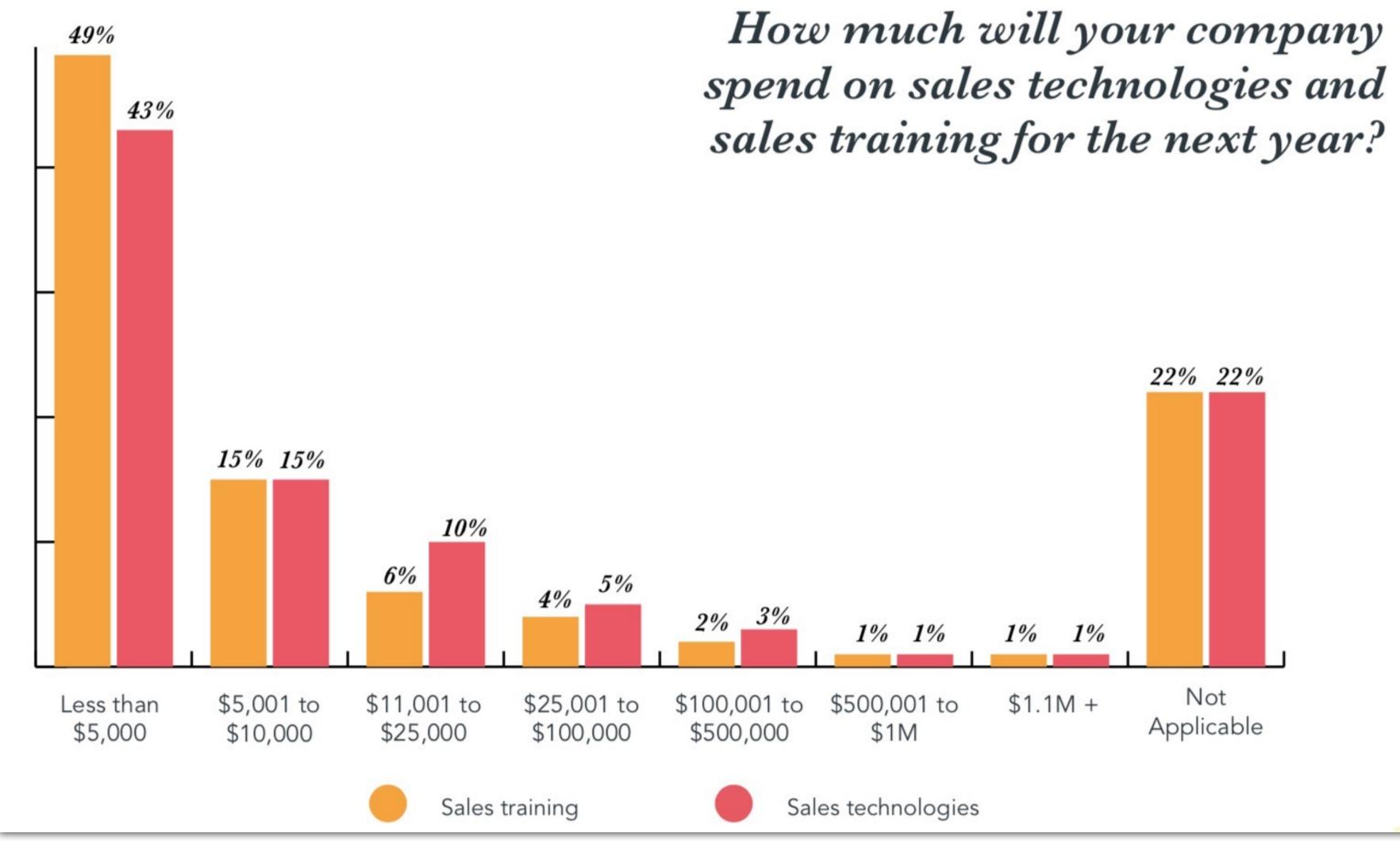


Source: The State of Inbound Report

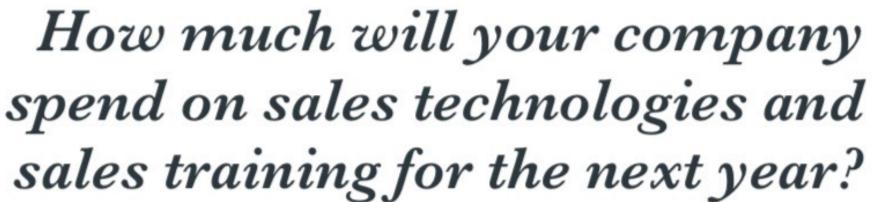


#### What is more difficult to do in sales compared to 2 to 3 years ago?

### **MOST COMPANIES ARE STILL UNDERINVESTING** IN SALES...

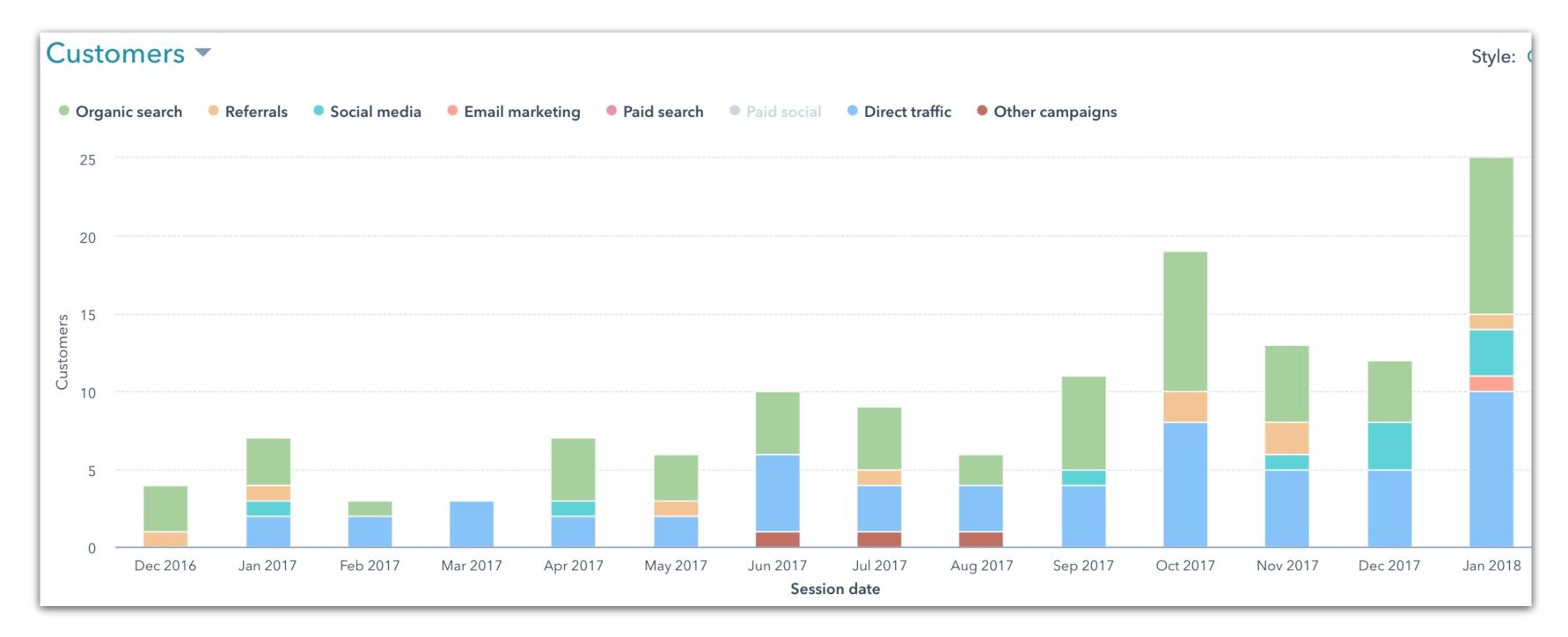


#### Source: The State of Inbound Report





# THE CLOSE OF OUR 1ST YEAR USING SALES HUB





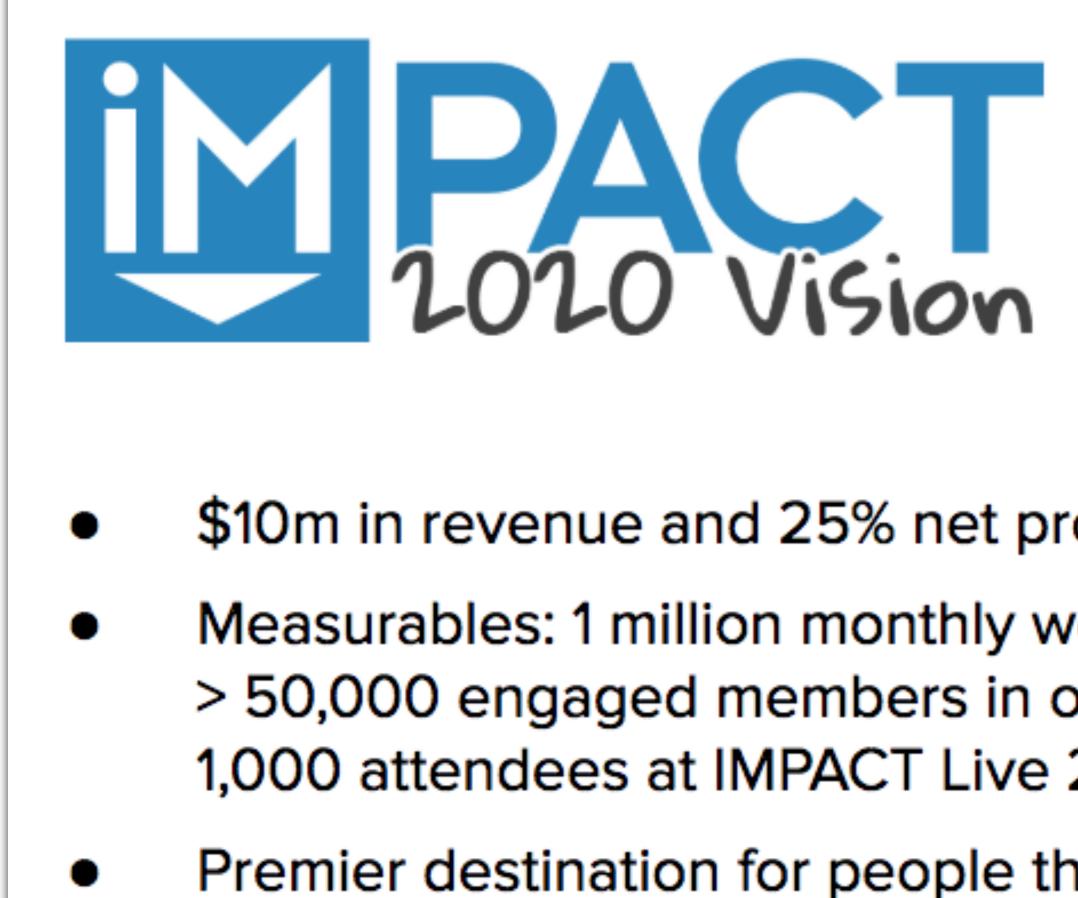




# IMPACT'S 2020 VISION

IMPACT's Leadership Team, using staff interview/survey input, invested 2-days off-site with a consulting firm to draft it.

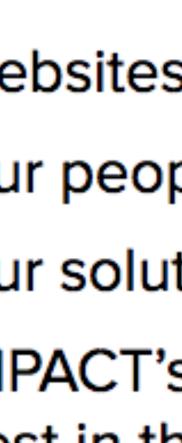
Our CEO reviews elements of the vision in each monthly All-Hands.



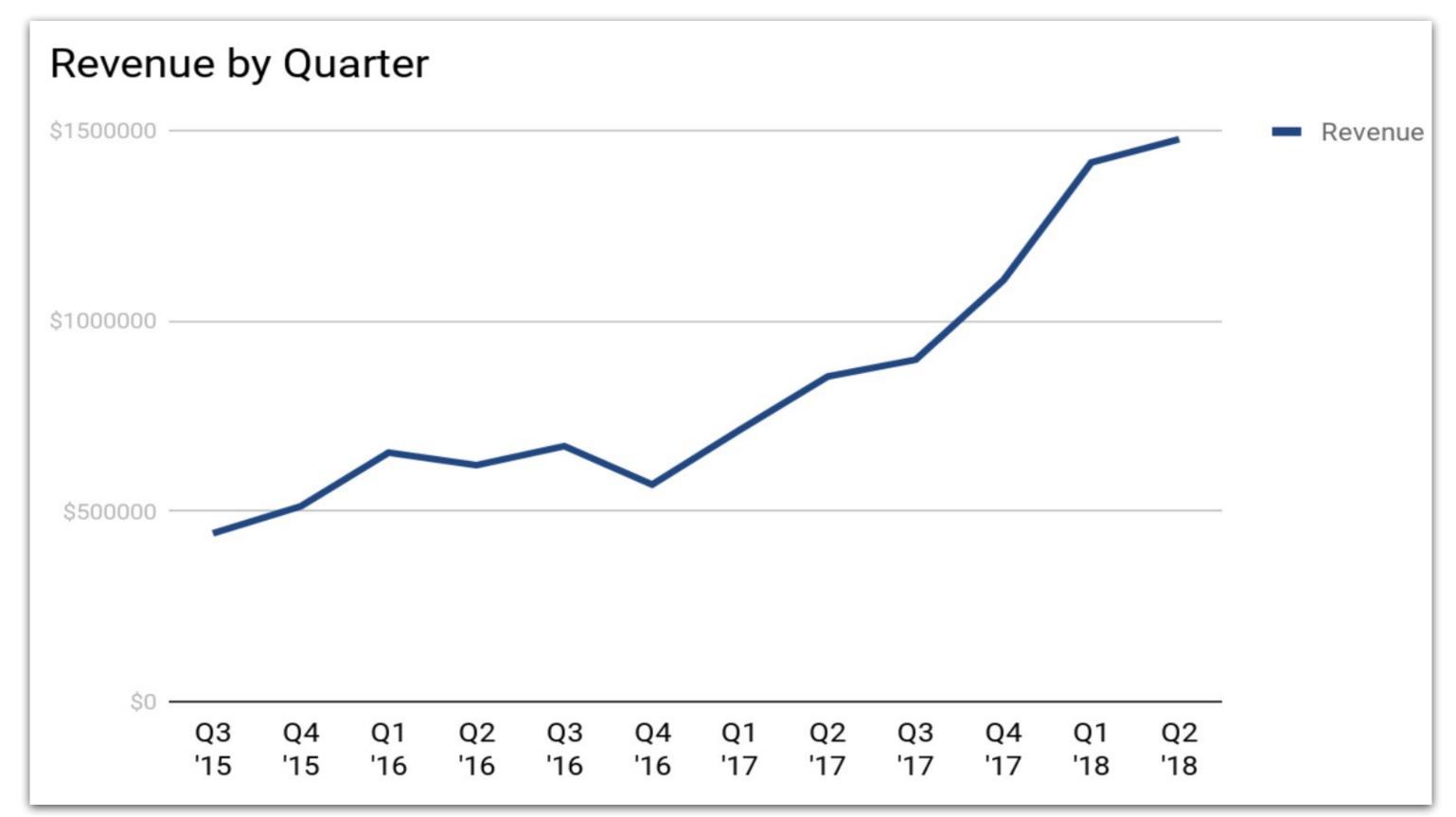


5% net profit	•	We
nonthly website visitors,	•	Ou
nbers in our community, ACT Live 2020	•	Ou
people that want to have more	•	IMF





### **REVENUE GOALS CALLED FOR GROWING \$10 MILLION/YEAR RUN RATE BY END OF 2019**



For us, that meant our sales, marketing and services teams working together to grow by \$3 million+/year



### WHAT DO WE MEAN BY **'ULTIMATE PLAYBOOK'?**

BECAUSE IT'S ADAPTABLE AROUND YOUR GOALS, NOT JUST AROUND GETTING EVERY FEATURE USED.



### THE BEST PLAY IS IMPLEMENTING 1-2 REGULAR USES FOR EACH FEATURE UNTIL IT FORMS A HABIT. SALES PEOPLE RUN OFF OF HABITS.

@ NICKSALINBOUND

# HOW OUR TEAM ADOPTED CRM + SALES HUB

# (A HIGHLIGHT REEL)



# **GOALS IMPACT SET FOR** HUBSPOT SALES HUB

FEATURE ADOPTION FOLLOWED OUR TEAM'S GOALS:



**CENTRALIZE INFO** TRACKING











FOCUSING ON CUSTOMER SUCCESS



EXPANDING OUR INBOUND SALES TOOLSET



SUSTAINING TEAM SUCCESS AS 

# **OUR PLAYBOOK FOR INBOUND SUCCESS**

WITH HUBSPOT SALES HUB













FOCUSING ON CUSTOMER SUCCESS



EXPANDING OUR INBOUND SALES TOOLSET



SUSTAINING TEAM SUCCESS AS WE GROW

## ALL CONTACTS TRACKED IN CRM

Deals 🔻		Table	Board Search fo	or a deal <b>Q</b> Actions <b>-</b>	Import	Create deal
All deals	DEAL NAME	DEAL STAGE	CLOSE DATE 🗘	DEAL OWNER	AMOUNT 🌲	
All saved filters >		Sales Presentation Completed	Oct 31, 2018	Melanie Collins (mcollin	\$60,000	
Pipeline		Stalled	Sep 30, 2018	Marc Amigone (mamig	\$2,500	+
Agency Services 🔻		Stalled	Aug 1, 2018	Marc Amigone (mamig	\$20,650	
All deals		Connect Call Completed	Jul 31, 2018	Myriah Anderson (man	-	
199 deals Options •		Exploratory Booked	Jul 31, 2018	Vin Gaeta (vgaeta@imp	-	
+ Add filter		Exploratory Completed	Jul 31, 2018	Marc Amigone (mamig	\$30,000	
		Sales Presentation Booked	Jul 31, 2018	Marc Amigone (mamig	\$2,500	
		Exploratory Completed	Jul 31, 2018	Melanie Collins (mcollin	-	L
		Exploratory Completed	Jul 31, 2018	Marc Amigone (mamig	\$2,500	
		Sales Presentation Booked	Jul 31, 2018	Marc Amigone (mamig	\$2,500	
		Exploratory Booked	Jul 31, 2018	Myriah Anderson (man	-	0
		Connect Call Completed	Jul 31, 2018	Myriah Anderson (man	-	Tone of

#### "IF IT'S NOT IN THE CRM, IT DOESN'T EXIST"

### EVERYTHING ATTACHED TO THE DEAL RECORD

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Reports ~ Partner ~

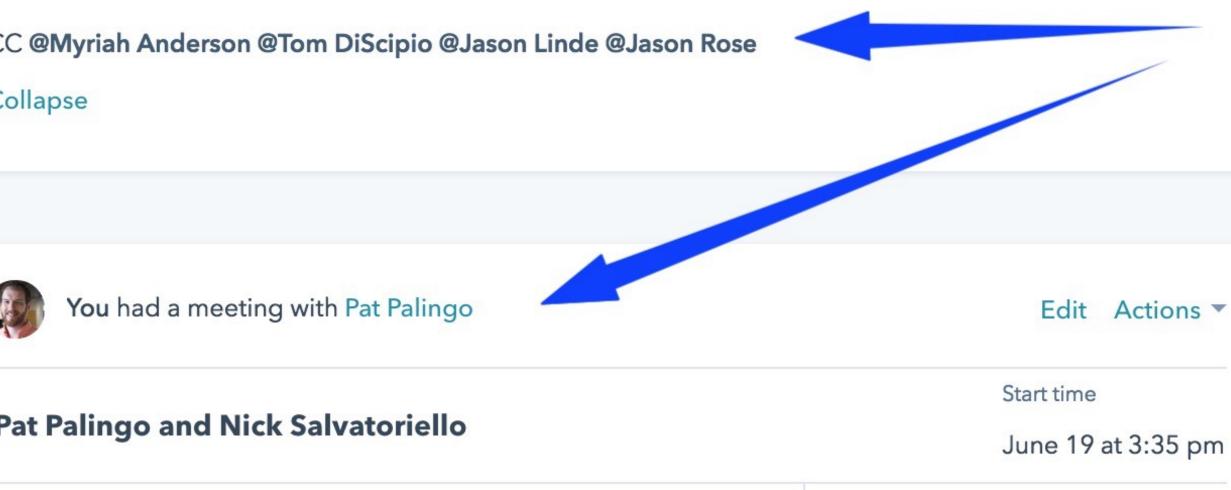
vic need a pillar page for each topic (think by product type) >> we need the izna coming of the buyers juide"

Q

Drift/Chat: Pat has been playing with Drift, wasn't sure what results he's really expecting. He's been wanting to do this for a while (and their live concierge in store is one of their signature differentiators - schedule an ppointment/match them to a rep). Main challenge is doing it in such a way that it doesn't show for VERYone, it doesn't distract those people who would be better off using the search bar or other places in the nav O having people miinterpret what it's used for

#### Ext steps:

Pat is awesome and he's going to grab time on my calendar for a part 2 and he wants to get back on etainer with us.





### **PIPELINES FOR EVERYTHING WE SELL** START WITH BASIC ONES AND BUILD OUT FROM THERE

 	• •	-				
\$ Contacts ~	Conversations $\sim$	Marketing ~	Sales $\sim$	Service ~	Automation $\sim$	Reports ~
	Reports & Analytics Tracking					
	Sales	~	Deal Pipe	lines and S	tages	
	Branding		PIPELINE			
	Call & meeting types					
	Calling		Agency	Services		
	Deals					
	Log emails in CRM					
	Meetings		Media S	Sponsorship F	Pipeline	
	Products & Quotes					
	Tasks		THINK -	FB Ads		
	Service	~				
	Users & Teams		Carina's	s Test Pipeline		
			Educati	on (Workshop	os & Consulting)	
			Live Spo	onsorship Pip	eline	
			Continu	ations & Ups	ells	
			[OLD] N	lew Business	Pipeline	

Partner  $\sim$ 

DEAL STAGES 21 Edit Delete 10 Edit Delete Edit 14 Delete 5 Edit Delete Edit 8 Delete Edit 10 Delete 5 Edit Delete 8 Edit Delete

Help

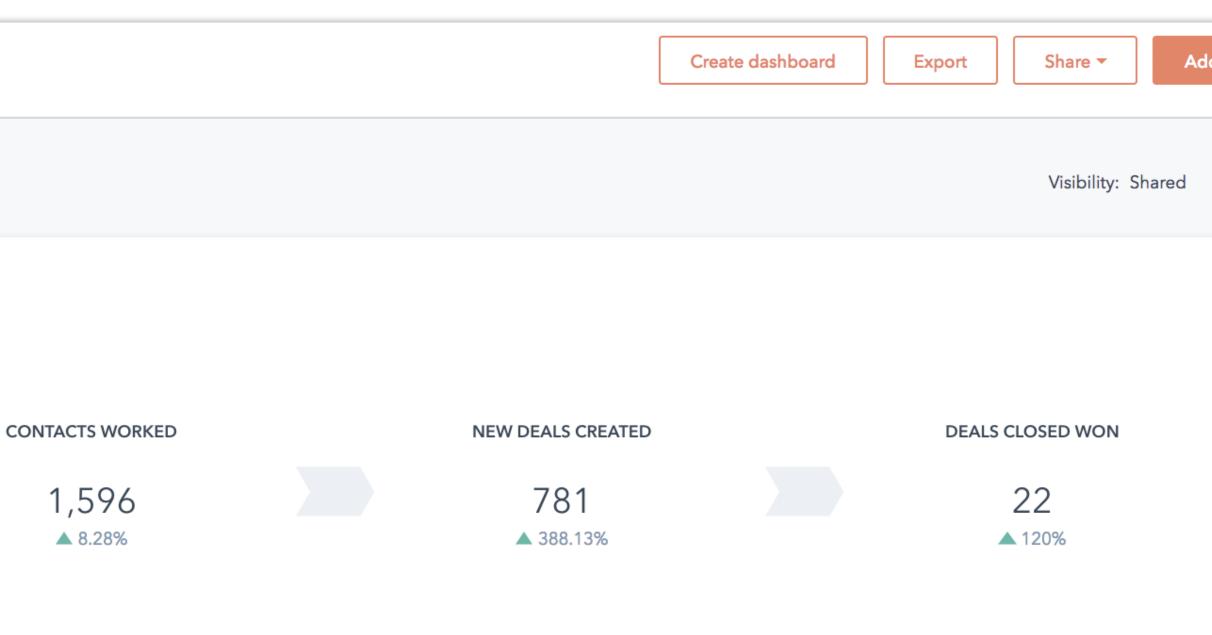


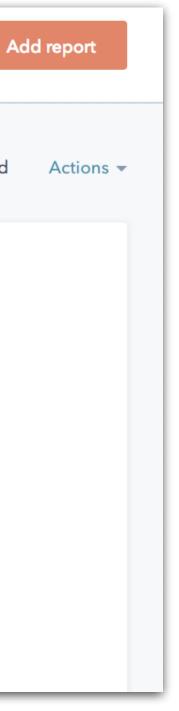
Q 🗘 🌲

#### THERE'S SOME GREAT DEFAULTS TO START WITH AND YOU CAN ADJUST FROM THERE

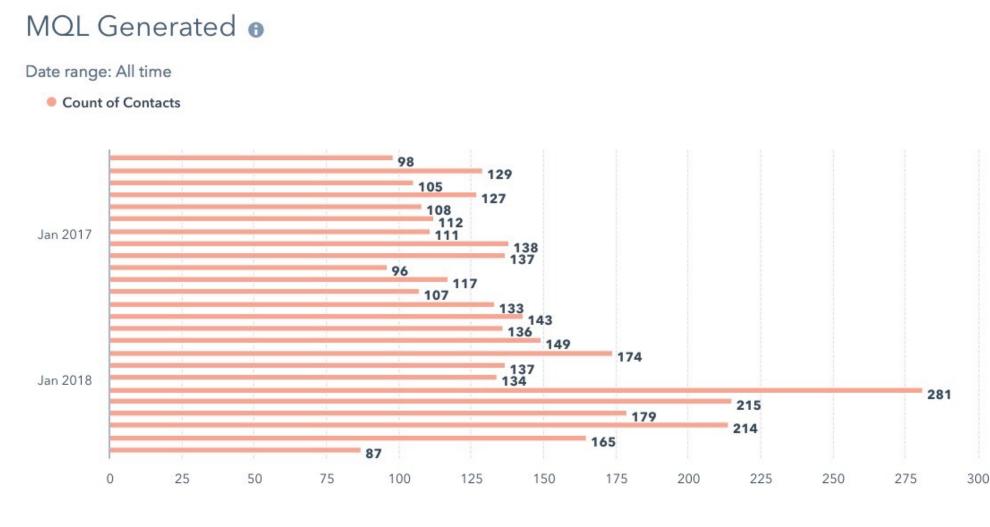
#### Sales Professional Dashboard -Search dashboards Q 荘 Filter dashboard 🛛 🛛 🗛 **Recently viewed** Sales Professional Dashboard Sales Perform Sales and Success Dashboard Date range: This qua Sales Dashboard Marketing Dashboard 100 HubSpot dashboards Marketing Dashboard Sales Dashboard Service Dashboard Web Analytics Dashboard

### **ALL REPORTS ON DASHBOARDS**

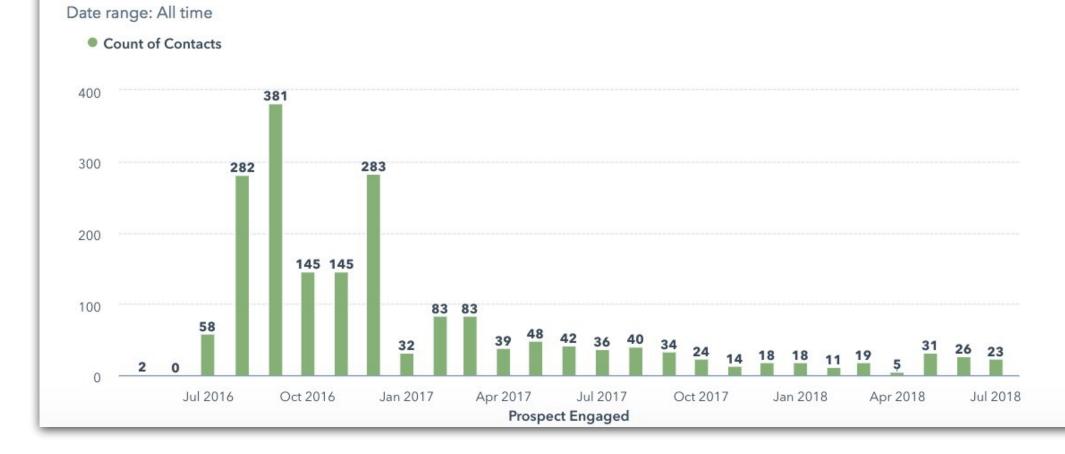


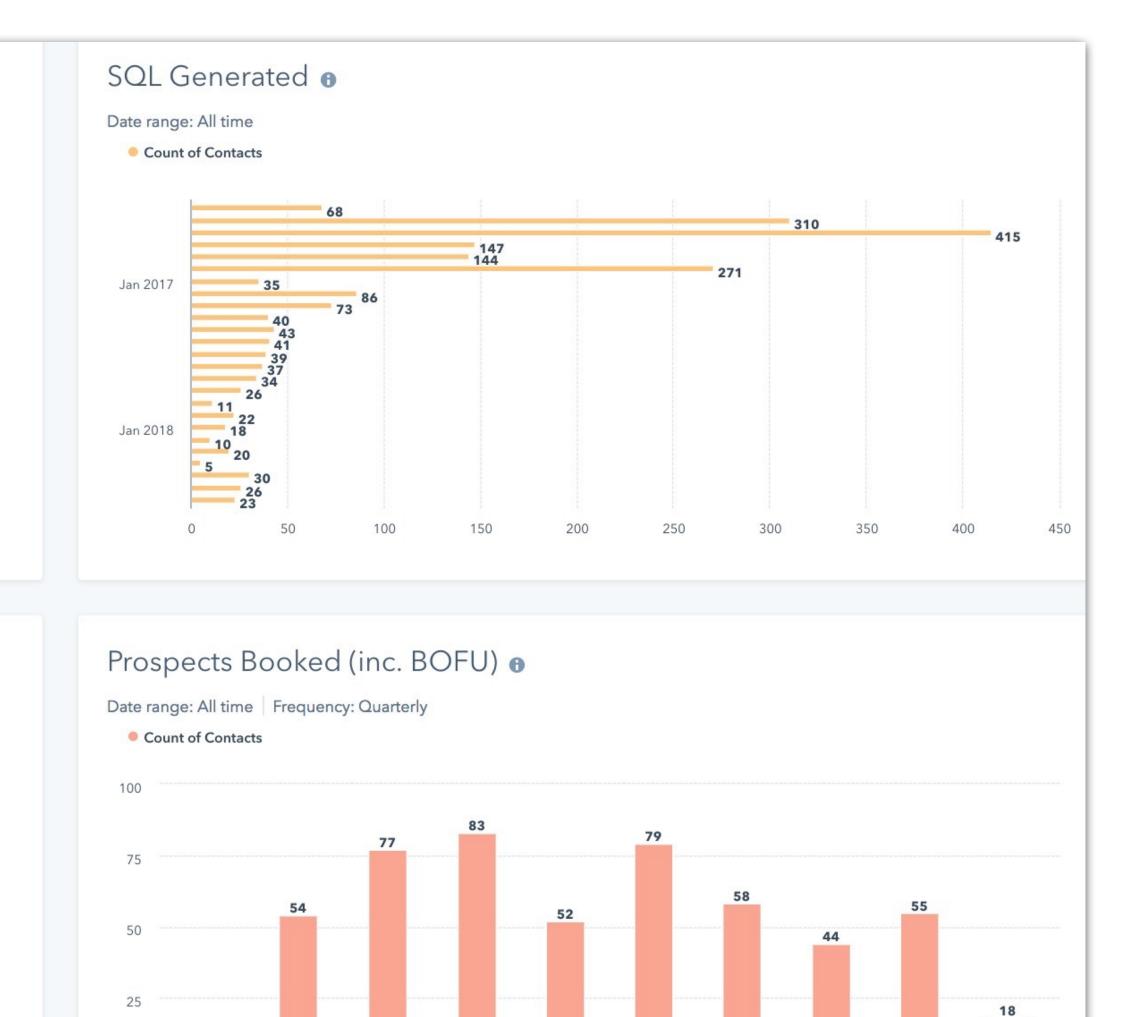


#### TRACK AND MANAGE "DEMAND" FOR **EXPLORATORY CALLS/NEW OPPS**



#### Prospects Engaged by Month





Q2 2016

Q3 2016

Q1 2017

Q2 2017

Prospect Booked

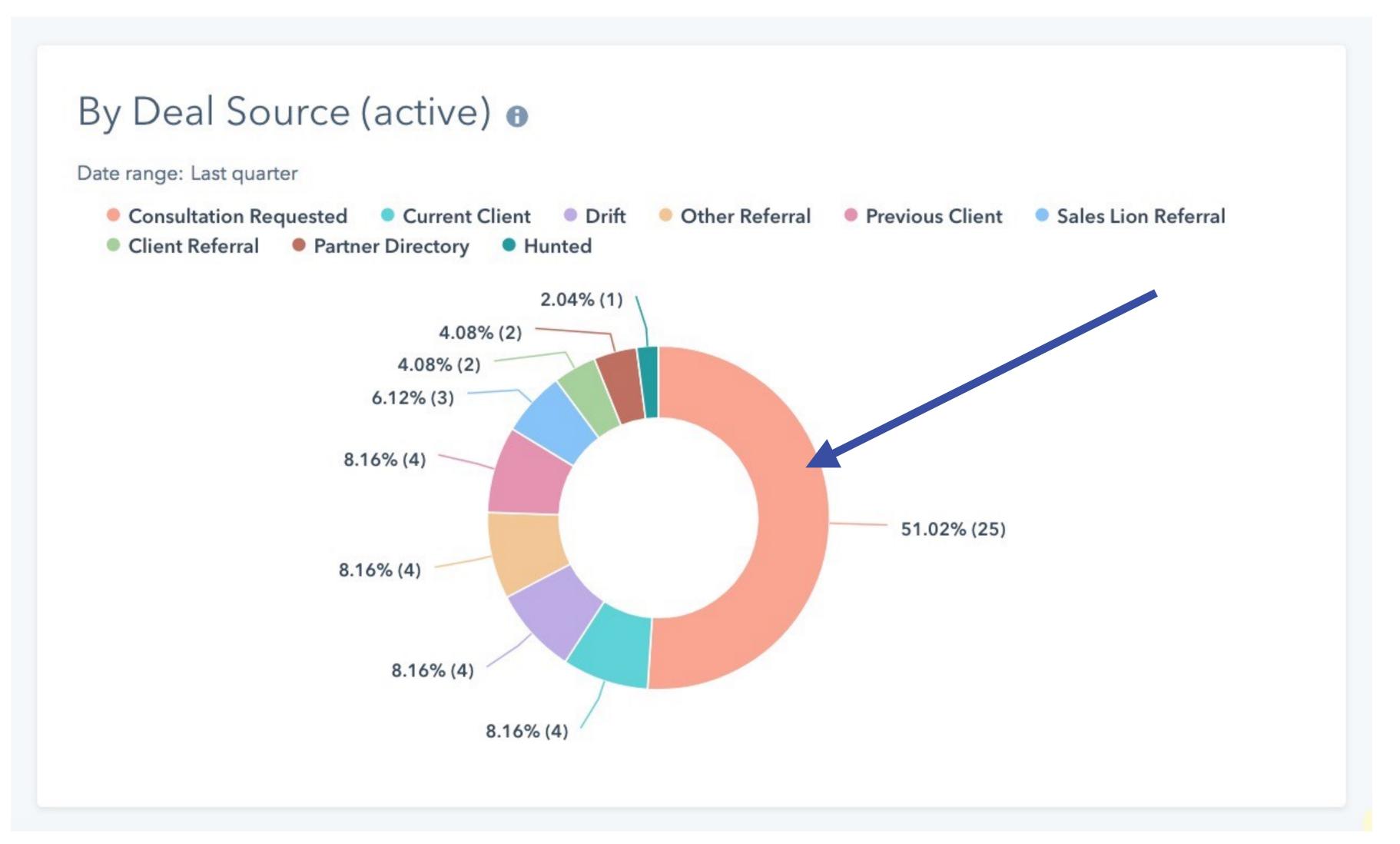
Q3 2017

Q1 2018

Q2 2018

### REPORTS ON WHERE OUR DEALS WERE COMING FROM

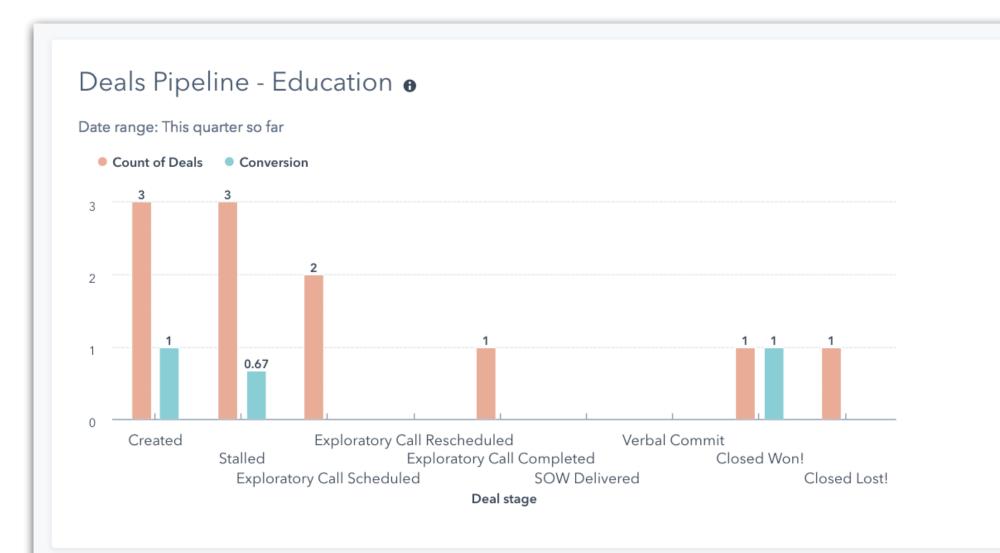
WE FOCUSED WHERE WE FOUND THE MOST SUCCESS (INBOUND LEADS VS. OUTBOUND PROSPECTING)



#### REPORTS: ON HOW MANY DEALS I HAD IN EACH STAGE OF MY PIPELINE

e range: This year so far Owners: Nick Salvatoriello	
DEAL STAGE	COUNT OF
Closed Lost	1
Closed Won!	10
Stalled	
Exploratory Completed	
Total	4:

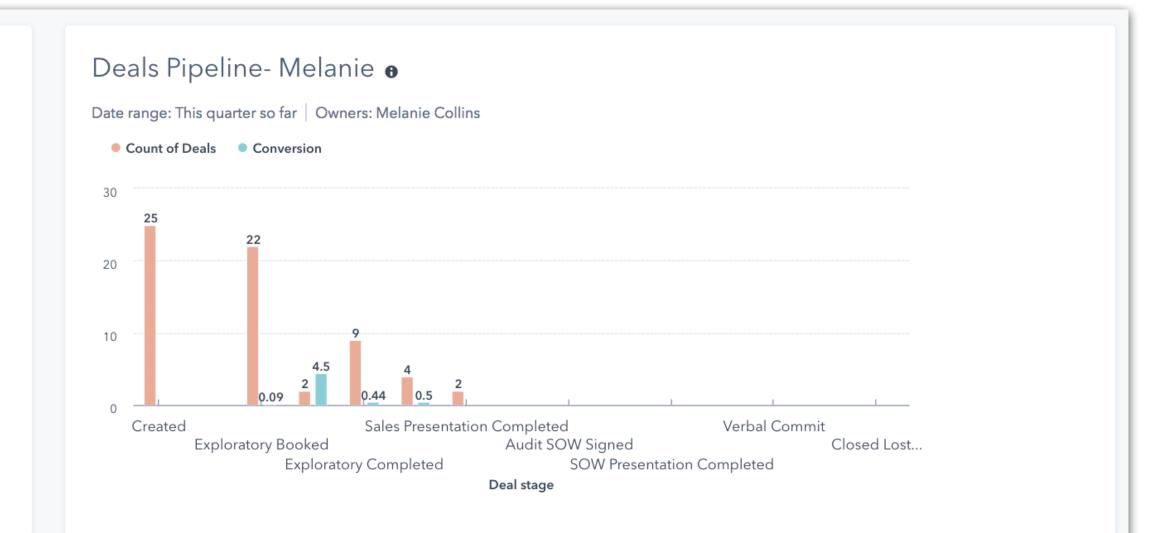
#### ALL REPS AND ALL DEALS ON ONE DASHBOARD ALLOWS MANAGERS TO COACH AND ADVISE ACCORDINGLY (SOMETIMES ABOUT FEATURE UTILIZATION)



#### Deals Pipeline- Marc 🛛

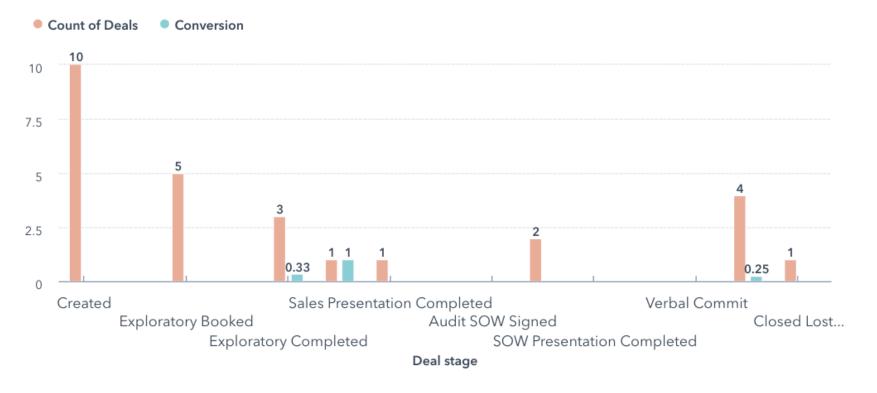


Date range: This quarter so far Owners: Marc Amigone



#### Deals Pipeline- Nick

Date range: This quarter so far | Owners: Nick Salvatoriello



#### **REPORTS: ON HOW DEAL SOURCES** WERE TRANSLATING INTO REVENUE



ARE THERE SOURCES THAT SHOW A BETTER FIT THAN **OTHERS? EMERGING CHANNELS FOR NEW OPPS?** 

2,300	\$102,075	\$152,600	\$27,500	\$45,000	\$25,000
rift	Current Client Deal S	Sales Lion Referral ource	Client Referral	BDR Referral	Partner Directory

# **OUR PLAYBOOK FOR INBOUND SUCCESS**

WITH HUBSPOT SALES HUB













FOCUSING ON CUSTOMER SUCCESS



EXPANDING OUR INBOUND SALES TOOLSET



SUSTAINING TEAM SUCCESS AS WE GROW

### WHAT IS OUR TEAM'S BASIC SALES PROCESS?

- 1.Connect Call (get our script we drafted)
- 2.**Exploratory/Goals Call** (I pick an outline and drop into my CRM deal notes. Inspired by <u>GPCT CI BA article</u>)
- 3."Demo" Call (Deck on how we operate, Meet a Services Team member)
- 4. Proposal + Estimate Presented (Deck with Goals/Trends/Insights and Quote)
- 5.**Master Services Agreement + Statement of Work Finalized** (Review both docs on a call and confirm timeline and commitment before sending over)
- 6.Closed Won (Complete Closing Checklist, Host internal kick-off)

#### PIPELINE DEAL STAGES THAT MIRRORED OUR SALES PROCESS

[OLD] New Business Pipeline 🖉

V Duck to ucu settings

Configure	Automation		
STAGE NAME			WIN PROBAI
Exploratory	Booked		10%
Goal Setting	g & Planning Book	ed	20%
HubSpot De	emo / Tactical Mee	eting Book(	30%
SOW Preser	ntation Booked		40%
SOW Preser	nted		50%
Verbal Agre	ement		90%
Closed Wor	۱		Won
Closed Lost			Lost

ABILITY	UPDATE STAGE PROPERTIES
-	
	Amount , Close Date , Deal Description , Has HubSpot? , and Exp
	Why it might not close by close date , Why it will close by close d
	Why it might not close by close date and Why it will close by clos
	Closed Won Reason and Close Date
•	Closed Lost Reason and Close Date

# **NOT A GOOD FIT?** ALWAYS AT HELP WITH FREE RESOURCES. IT'S INBOUNDY.

**Name:** Post-Explore: Not ready/just starting = try free tools, check back with us later Shared < Sales Process </p>

**Subject:** Follow up from our discussion - free tools/resources

Good talking with you just now. As a recap, our basic conclusion was it might be a bit early for an engagement with IMPACT.

did promise I would send along some resources though, in hopes we can help you folks "virtually" via some of the content/tools that we have put out that have been helpful to companies like yours:

\*A link to subscribe to the IMPACT marketing blog (subscribe to keep in touch + this page is a good example of a page you should build to convert your future US site visitors into newsletter and/or blog subscribers as well.). \*Run some numbers on IMPACT's ROI Calculator (calculate your goals and how your budgets/performance might impact them, no pun intended ;)

\*A simple tool to help you brainstorm blog titles based on topics you want to write about. Sometimes the title is the biggest challenge to getting started! We can dig into this data with you down the road.

I hope you find these resources useful and that you'll check back in with us in a few months once you've run some marketing



# REQUIRED DEAL INPUTS IN ORDER TO MOVE DEALS AHEAD

[OLD] New Business Pipeline Configure Automation	Ø	
STAGE NAME	WIN PROBABILITY	UPDATE STAGE PROPERTIES
Exploratory Booked	10% 🔻	
Goal Setting & Planning Booked	20% 🔻	Amount , Close Date , Deal Description , Has HubSpot? , and Exp
HubSpot Demo / Tactical Meeting Book	30% 🔻	
SOW Presentation Booked	40% 🔻	Why it might not close by close date , Why it will close by close d
SOW Presented	50% -	Why it might not close by close date and Why it will close by clos
Verbal Agreement	90% 🔻	
Closed Won	Won 🔻	Closed Won Reason and Close Date
Closed Lost	Lost	Closed Lost Reason and Close Date

# **REQUIRED FIELDS TO MOVE DEALS AHEAD** (FOR BOTH PARTIES)



## Awesome! We're Excited to Talk to You

Before our call, it would be very helpful if we were able to learn a little more about you and what you're looking to accomplish.

### Please take 5 minutes to complete the form below :)

By hiring a marketing agency, what is your organization hoping to achieve? What would the headline of a successful case study to read?\*

What are the most important metrics you track?\*

If your website was performing 10x better than it is right now, what would be different?

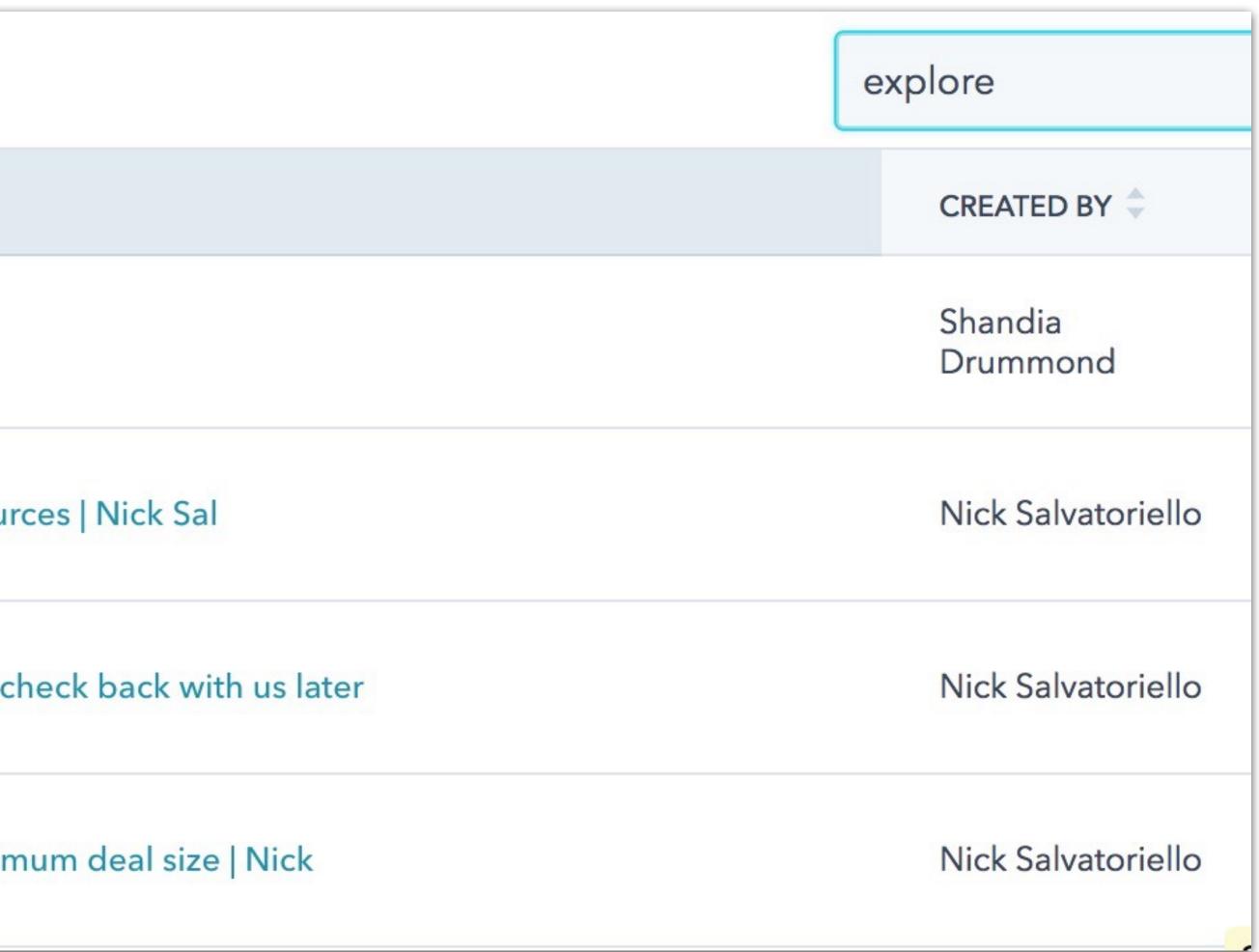
Who owns content marketing in your organization?\*

How much does the average customer spend with you over a lifetime (LTV)?\*

# EMAIL TEMPLATES FOR POST EXPLORATORY CALL FOLLOW UP

View: All	
	NAME
	BOFU Explore Schedule Questionnaire
	Post-Explore: Build it yourself internal proposal resou
	Post-Explore: Not ready/just starting = try free tools, o
	Pre-Explore - budget concerns / can't afford our minir

Resource: More template ideas from HubSpot



# **OUR PLAYBOOK FOR INBOUND SUCCESS**

WITH HUBSPOT SALES HUB













FOCUSING ON CUSTOMER SUCCESS

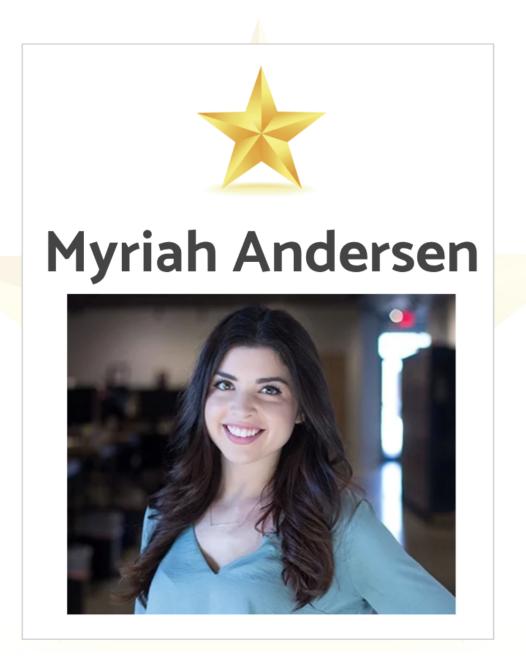


EXPANDING OUR INBOUND SALES TOOLSET



SUSTAINING TEAM SUCCESS AS WE GROW

# HIRE A LEAD MANAGER / CONNECTION SPECIALIST



In charge of all consultation requests and making sure no lead is left behind.



### Also sometimes known as:

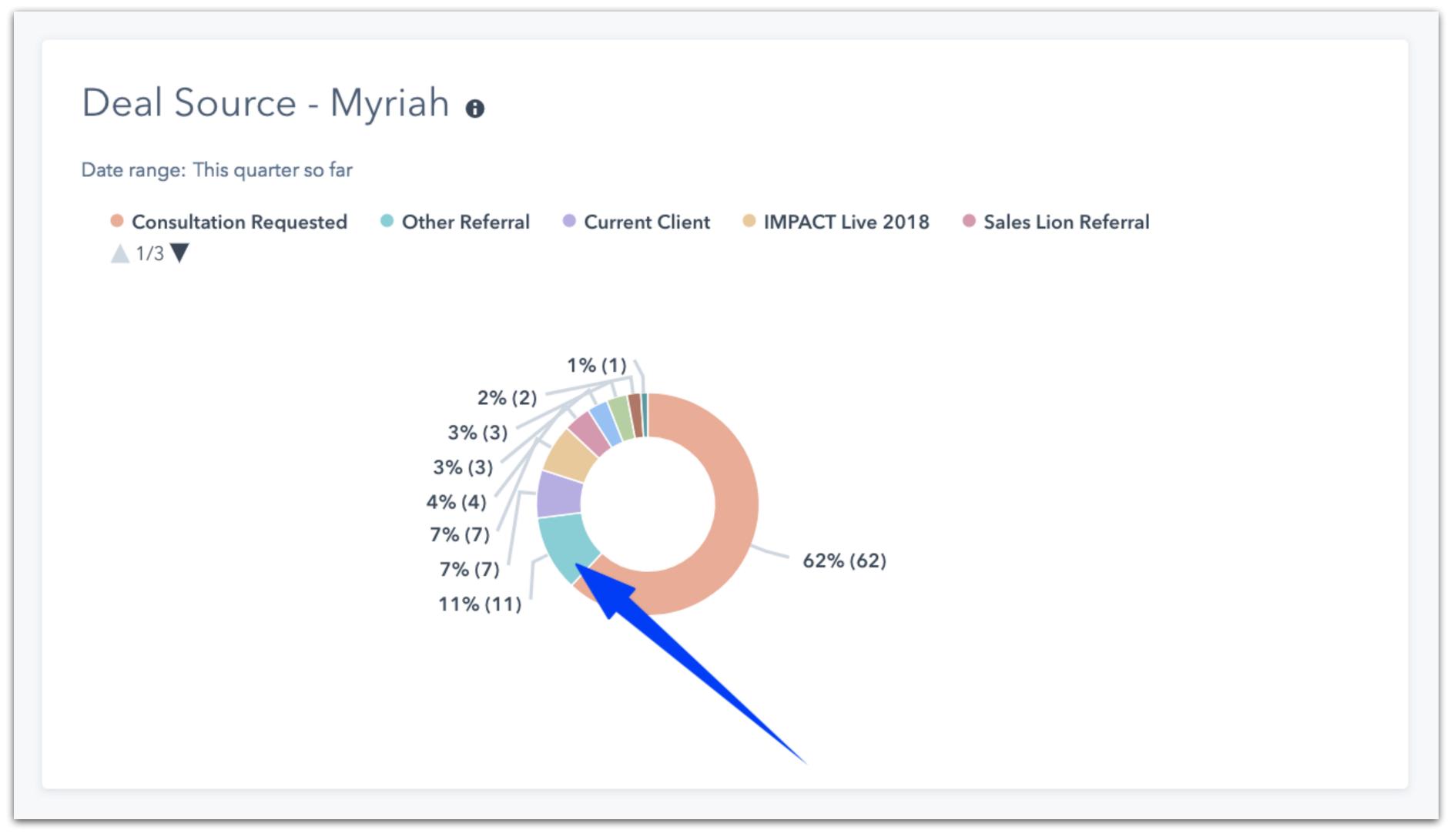
- Business Development Rep (BDR)
- "The Front Desk"
- Sales Team's Gatekeeper / Filter

### Sometimes can double as:

- Outbound Sales Development Rep (SDR)
- Marketing + Sales Tech Integrator
- Head of Online Community



# **LEAD MANAGER / CONNECTION SPECIALIST: TRACKED ON THE DASHBOARD**



THINGS I LEARNED ABOUT BEING EFFECTIVE.

# Learn More: AFTER 50+ SALES CONNECT CALLS, HERE ARE 10

# LEAD MANAGER ENTERS **CONNECT CALL + DEAL INFO BEFORE BOOKING US**

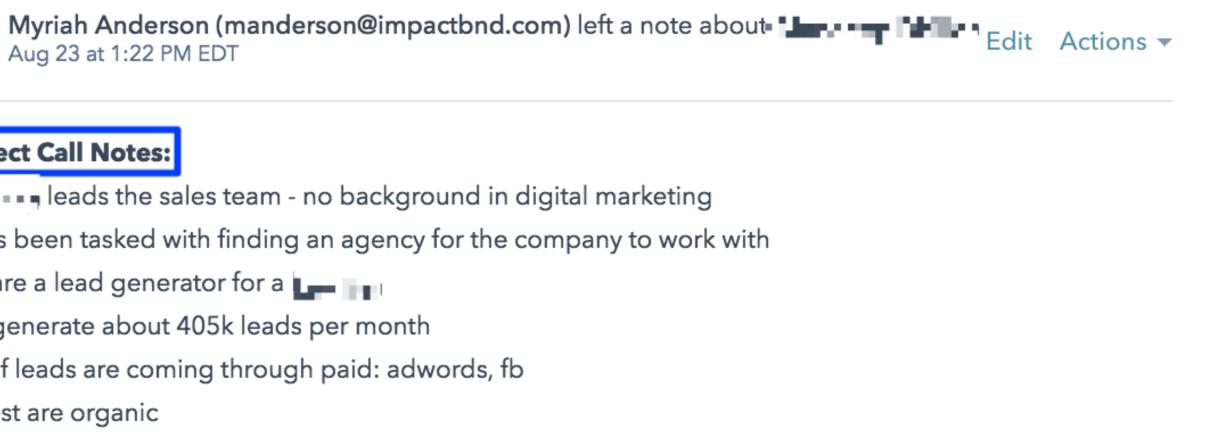
### **Connect Call Notes:**

Aug 23 at 1:22 PM EDT

Ľ

leads the sales team - no background in digital marketing He has been tasked with finding an agency for the company to work with They are a lead generator for a They generate about 405k leads per month 40% of leads are coming through paid: adwords, fb The rest are organic Been in investing in SEO efforts Use HubSpot - primary reason - reached out Looking to work on month to month basis, would do a year contract Need content creation, optimization of HubSpot CRM to better utilize, paid help Had an agency for three years and ended relationship with agency. Have a couple consultants during transition phase Budget: Open - depends on services. Talked about where ours start at minimum and that falls within what they are able to invest.

Timeline: Making decision by Sept. 7th and kicking off by Sept17th



### **Create deal**

Deal name \*

[Company Name] [Product/Service Need]

### Pipeline \*

**Agency Services** 

Deal stage \*

Connect Call Completed

Deal owner \*

Nick Salvatoriello

Create date \*

6 07/16/2018

**Business Development Representative \*** 

Myriah Anderson (manderson@impactbnd.com)

### Deal Source \*

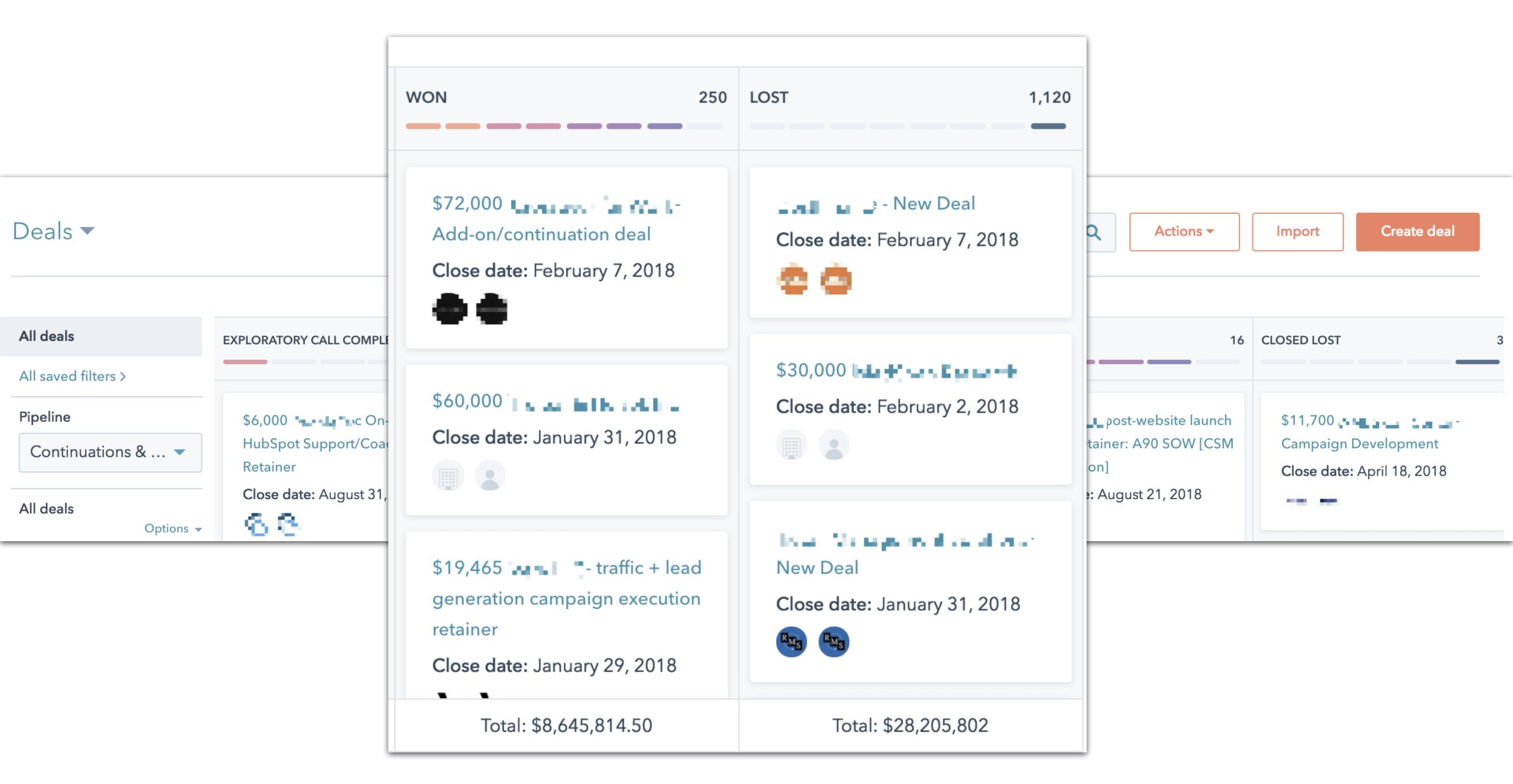
**Consultation Requested** 

Company

Contact

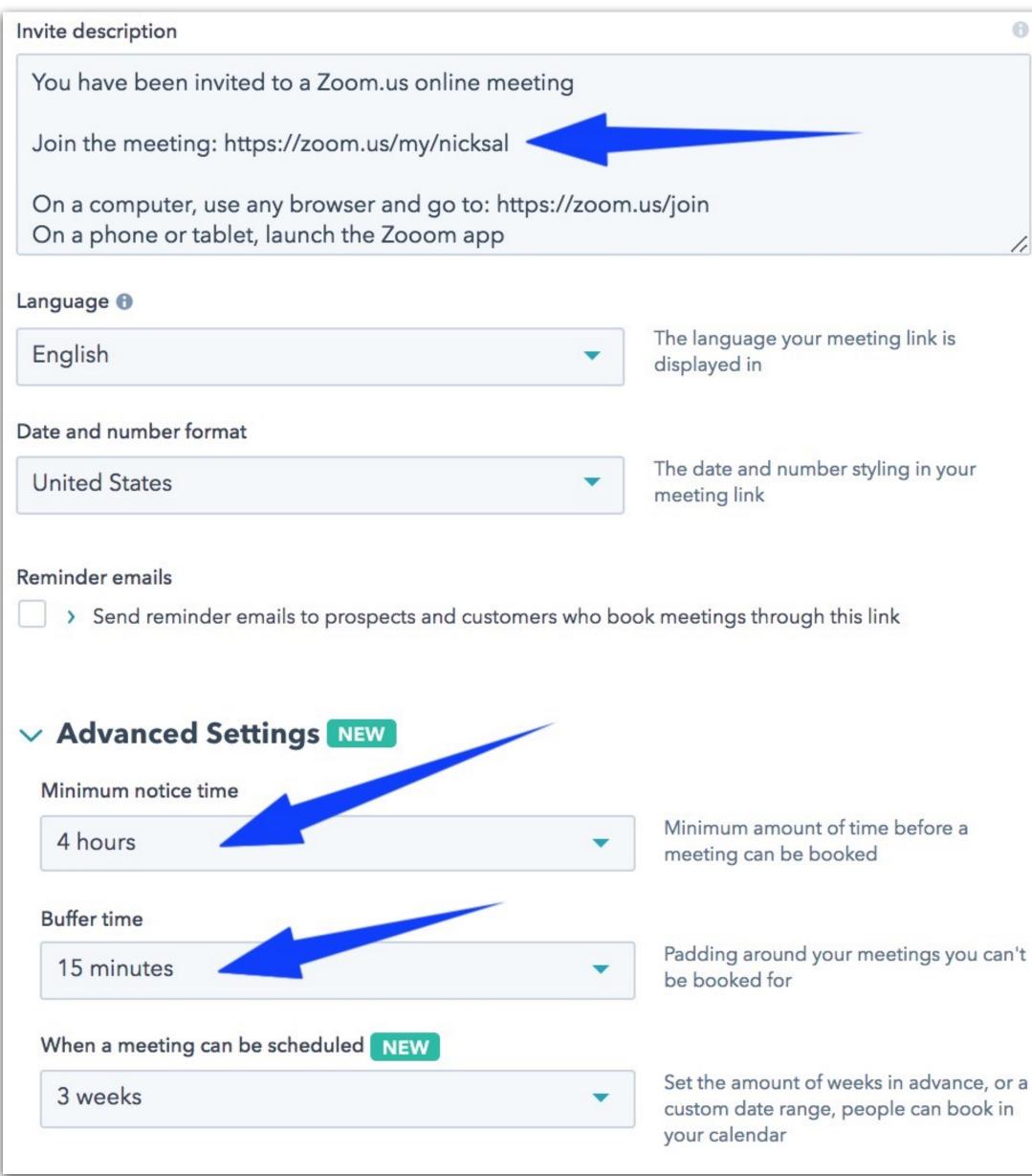


# **DEALS 'CARD VIEW' = MY HOME PAGE**



# SET UP SELF-SERVICE MEETING BOOKING

0







### Find a time to meet Nick

<		July			>		
SUN	MON	TUE	WED	THU	FRI	SAT	
					6		
8	9						
	16		18	19			
			25	26	27	28	
29	30	31	1	2	3		

### How long do you need?

15 min	30 min	60 min

### What time works best?

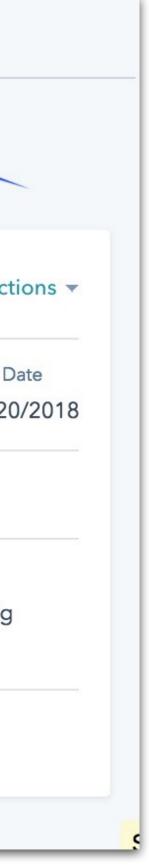
UTC -04:00 Eastern Time -

8:35 am	
10:00 am	
1:05 pm	



# STAYING IN THE APP, STAYING IN THE FLOW...

🗹 New note 🛛 🐱 Email 📞 Call 🕂 Log activity 🗔 Create task 🗰 Schedule							
• Choose a recipient	Cc Bcc	Activity	Notes	Emails Call	s <b>Tasks</b>		
From Nick Salvatoriello ( I@impactbnd.com)		1					
Subject Add a subject			uly 2018				
Type something brilliant			uly 2010				
Nick Salvatoriello Inbound Marketing Specialist		G	You crea	ited a task for <b>yourself</b>			
MPACT Branding & Design LLC			Draft St	atement Of Work a	nd share for review	v internally	
Phone: (203) 265-4377						,	
Email: <u>nsal@impactbnd.com</u> Web: <u>http://www.impactbnd.com</u>			Utilize notes fro	om Deal Record and SC	)W Template for post-la	aunch support reta	ainers
inkedin: Connect with me							
MPACT helps people and their organiz tions succeed.			Туре	Assigned to	Email reminder		Queue
A 3: ⊠			To-do	Nick Salvatoriello	07/20/2018 at 8	3:00 AM	Nick's Ju Win Tasks
Artivity Notes Empile Calls Tasks			Associated with				0
Activity Notes Emails Calls Tasks			-		Website redesign + r	ebuild on HubSpot	
July 2018							
S You created a task for yourself	dit Actions 🔻						
Send follow up email to prospect confirming next week's agenda	Due Date 07/23/2018						





### Nick Salvatoriello 🔻 All types 🔻 All time 🔻

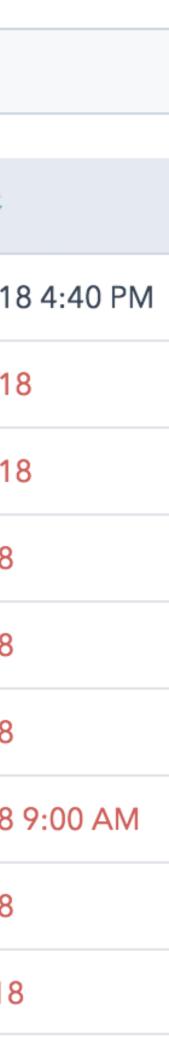
TITLE 🗘	TYPE
It's been a year since you marked this lead as clo	osed lost
Draft PPC Mgt SOW based SOW from Tom via	Create a follow up :
lt's been a year since you marked this lead as c	Create a follow up
Email Katie + Bill, are we ready for finalizing qu	We'll create a task for y Murphy in 3 business d
Send follow up email to prospect confirming n	Add task Cance
Draft Statement Of Work and share for review i	Don't ask me again
Call Ross today to discuss Estimate/SOW	Don't ask me again
Check back on Steve's progress, wanna meet Ke	evin?
Get back to James with alternative plans to mov	e ahead i



# 'TASKS' = MY 2ND HOMEPAGE

Search for a task

E  ASSOCIATED WITH		DUE DATE 🔷
Daniel Murphy		Aug 16, 2018
task?		Aug 14, 2018
		Aug 10, 2018
you to follow up with Daniel days 🔻	Suppor	Jul 31, 2018
el		Jul 23, 2018
		Jul 20, 2018
		Jul 18, 2018
Steve Brooks		Jul 11, 2018
Sonitrol New Englar	nd	Jun 28, 2018
1 2 3 4 Next <b>&gt;</b> 25 p	per page 🔻	



# **OUR PLAYBOOK FOR INBOUND SUCCESS**

WITH HUBSPOT SALES HUB













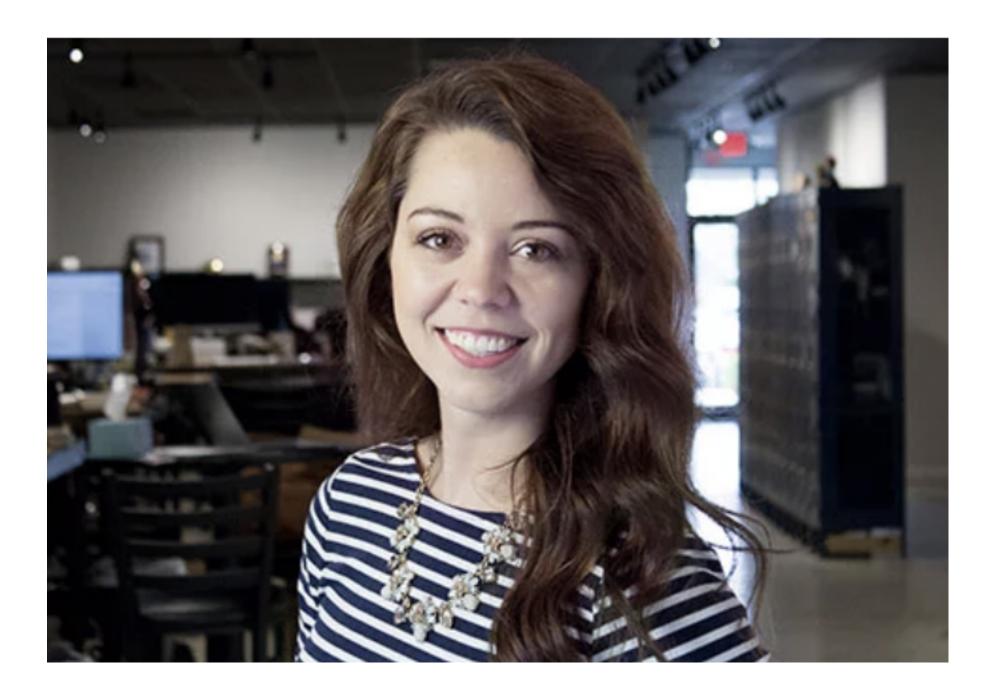
FOCUSING ON CUSTOMER SUCCESS



EXPANDING OUR INBOUND SALES TOOLSET



SUSTAINING TEAM SUCCESS AS WE GROW



"IT'S REALLY ABOUT TAKING THESE INDIVIDUAL PIECES OF DATA AND CORRELATING THEM TO EACH OTHER TO SEE IF THE SALES PROCESS CAN HELP **INFLUENCE THEM.**" @ DAKOTAHERSEY 



# TOP REASONS FOR CLOSED/ WON OR CLOSED/LOST

Conducting a mini-debrief on every deal that goes into either closed/won or closed/lost stage

### Move deal

Before you can move **Constant**, **Inc.** to **Closed Lost...** you will need to update these properties

### **Closed** lost reason

Nick S was assigned a rushed on exploratory call in the middle of required team training and Nick didn't make time for detailed follow up besides sharing out agency overview deck + booking link for next call to discuss further.

Opp was competitive and never heard back from the prospect - despite video message from Myriah to reschedule even :\*(

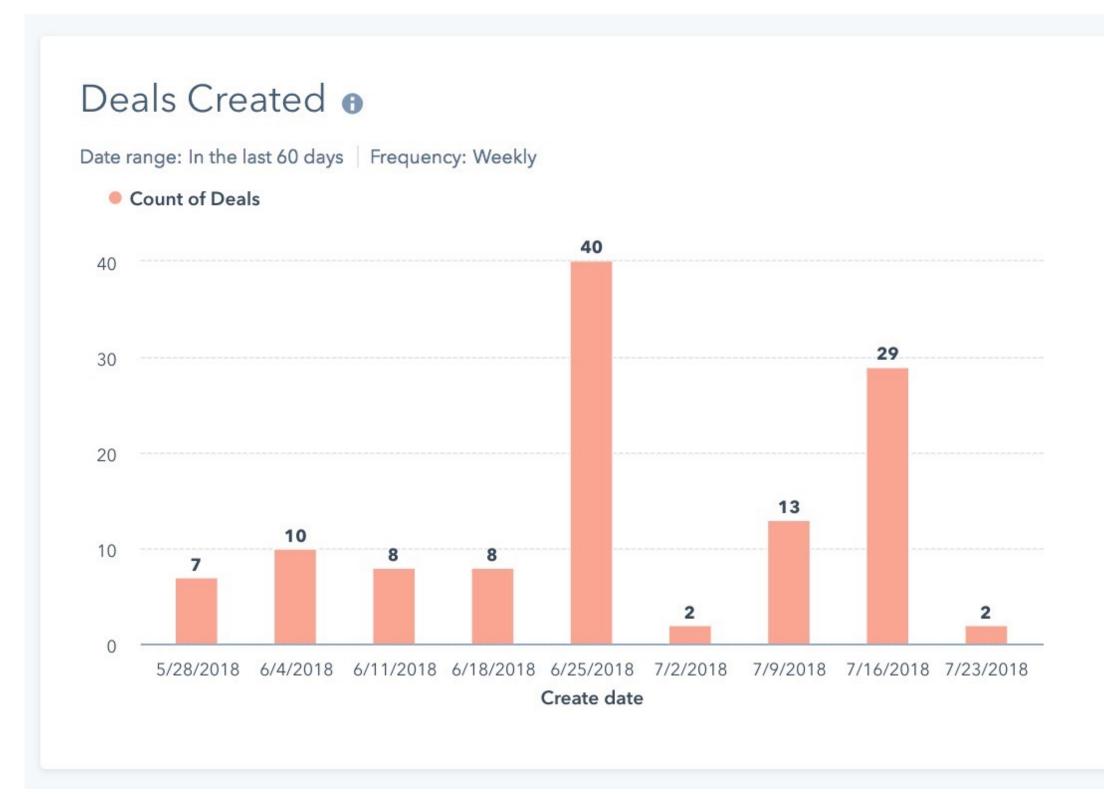
Lesson learned. Never host explore calls without 15 minutes of prep and follow up available (and always send a detailed follow-up or at least a good excuse for more time before you do).

See less

Previously completed properties

X

# MAINTAIN RESPONSIVENESS AND QUALITY



We attained an average 18-20% close/won rate on all deals we got assigned to do exploratory calls with

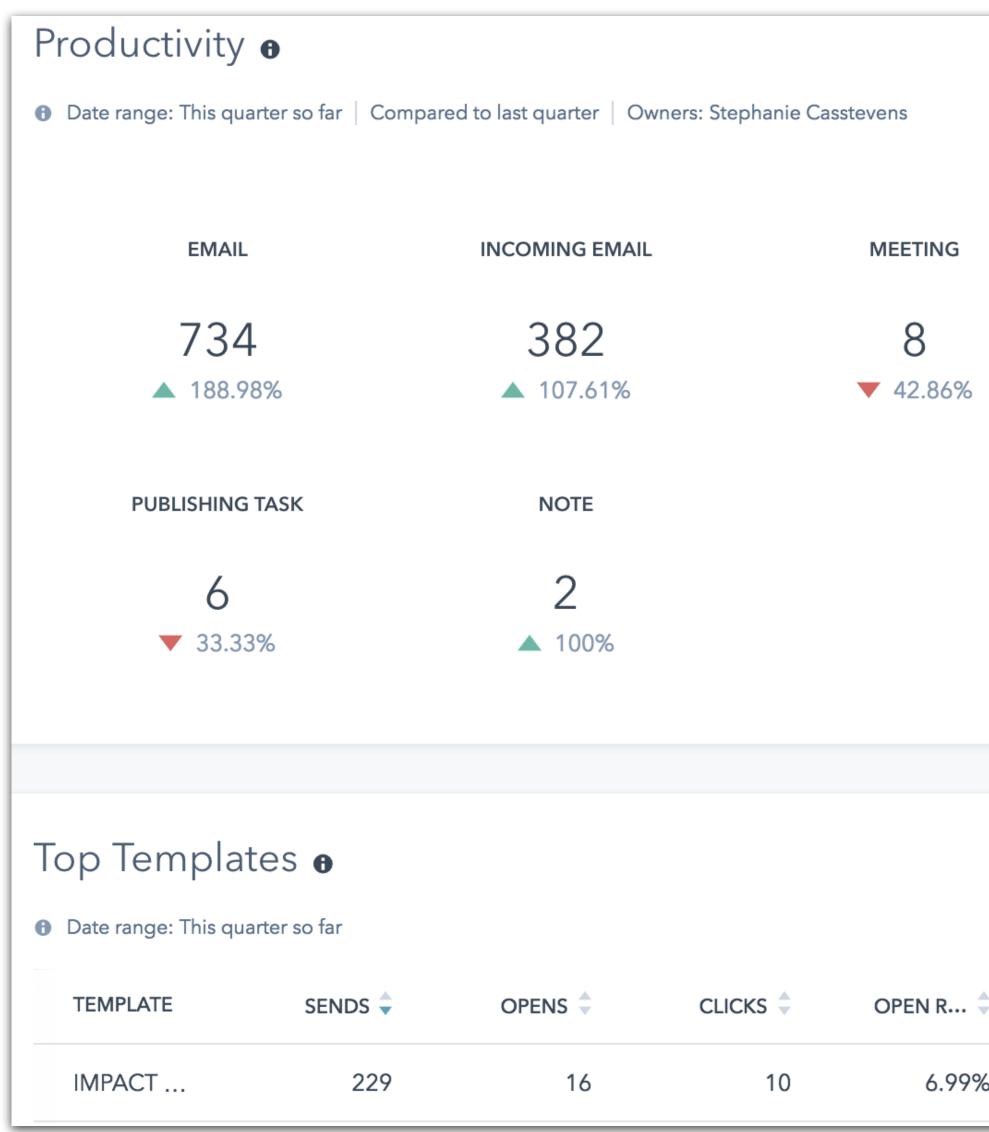
DEAL STAGE	COUNT OF I
Closed Lost	
Closed Won!	
Stalled	
Exploratory Completed	
Total	

We learned that we could handle 10-15 active opportunities at once.

Anything more and our responsiveness and/or quality of response dropped.



# **ADOPTION OF FEATURES WAS INCONSISTENT**



Template Performan	ce 🛛	
Date range: This quarter so far		
SENDS	OPEN RATE	CLICK RATE
438	37.21%	29.45%
REPLY RATE		
9.2%		
Top Users of Templa	ites o	
Date range: This quarter so far		

<b>‡</b> с	L	OWNER	SENDS ≑	OPENS ≑	CLICKS ≑	REPLIES ≑
9%		Stephani	264	36	20	-



# HERE COMES 2018....



# **GREAT SUCCESS = GREATER RESPONSIBILITY**

Increasing team size, talent, and specialization allows us to expand the business, but also brings new challenges.....

# Tom's Highest Priorities - January 22, 2018

- Finalize and implement 2018 Revenue Tracker Shandia ٠
- pipelines. Shandia
- •
- Melanie
- Upload Q1 2018 Objectives into 7 geese (Liz is on it)
- \$60k) once they come on
- Develop revised comp plan for CSM role

- Optimize the Audit & 90-Day Plan Agreement

Finalize 2018 scorecard and how to quickly get data for each metric - Shandia

Finalize new deal stages within HubSpot for the agency, education and sponsorship

Update / Simplify Master Services Agreement template by February 14th Implement optimized connect call process (doc started by Melanie) - Shandia with

Create 1st draft of slide deck for new version of the sales presentation Work with Brie to put together plan to get THINK Creative MRR to \$80k (from \$50 -

Transition Nick / Melanie / New Salesperson into taking education calls Rebuild / relanguage TSL Speaker and consulting Agreements - Shandia Finalizing Client Qualifiers document to account for audit and new services

# **OUR PLAYBOOK FOR INBOUND SUCCESS**

WITH HUBSPOT SALES HUB













FOCUSING ON CUSTOMER SUCCESS



EXPANDING OUR INBOUND SALES TOOLSET



SUSTAINING TEAM SUCCESS AS WE GROW

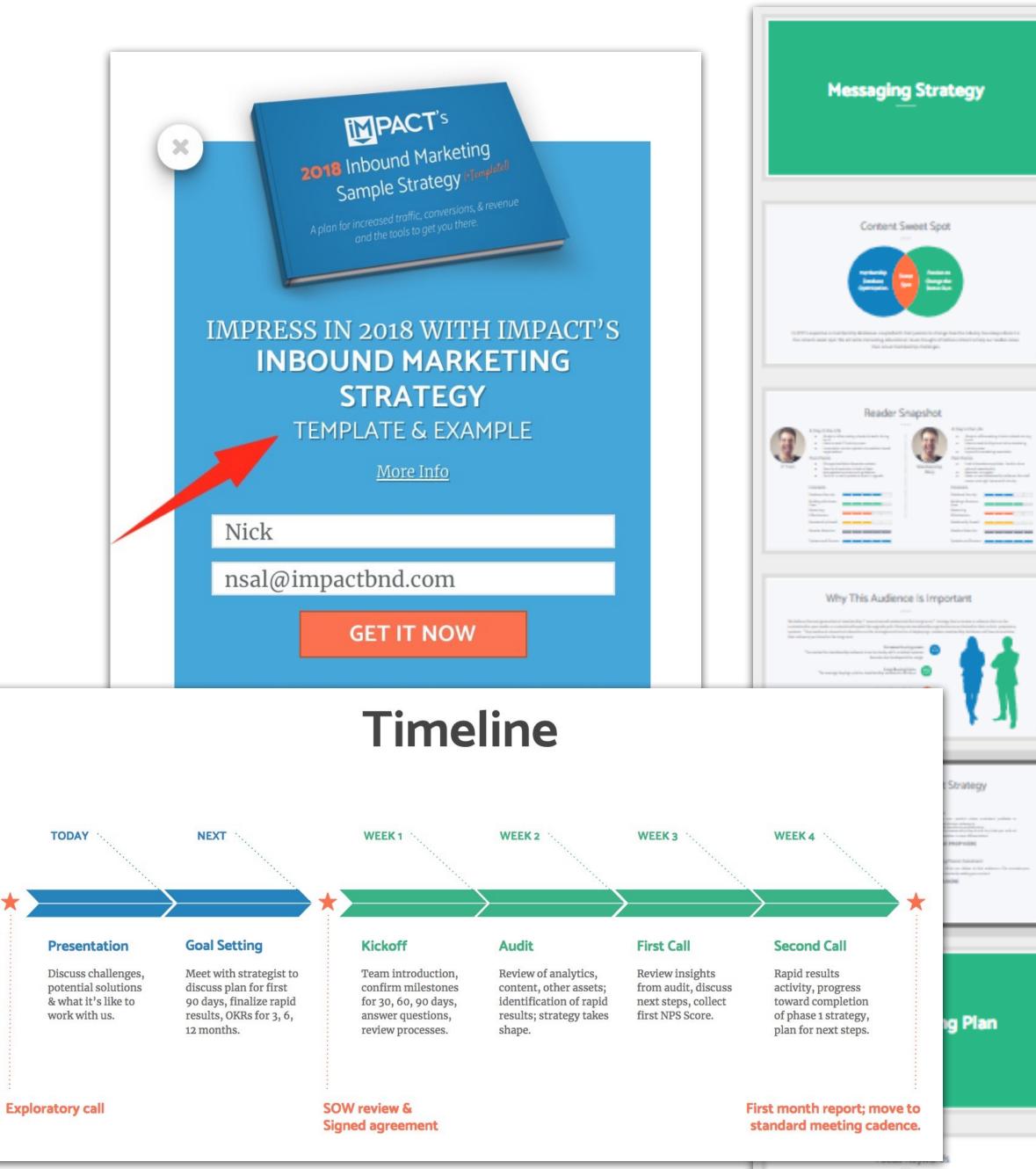
# CREATING A TRIP WIRE / KICK-START OFFER





# OUR NEW OFFERING: MINI AUDIT + 90 DAY PLAN

2-WEEK MARKETING AUDIT AND RECOMMENDED MARKETING STRATEGY FOR NEXT 90 DAYS





# **OUR PLAYBOOK FOR INBOUND SUCCESS**

WITH HUBSPOT SALES HUB

















SUSTAINING TEAM SUCCESS AS WE GROW

FOCUSING ON CUSTOMER SUCCESS



# FOCUSING ON POST SALE / CUSTOMER SUCCESS MANAGEMENT TRANSITIONING FROM 'HUNTER' TO 'FARMER' AS RELATIONSHIPS GROW AND EXPAND

### ✓ ONBOARDING / ENGAGEMENT

Internal hand-offs

Joining Project kick-offs

**Quarterly Business Reviews** 

### ✓ CONTINUATION / RENEWAL

Ensuring timely conversations are had with customers

Discounts/pricing are available

Adjusting expectations based on lessons learned from previous work together

RETENTION / ACCOUNTABILITY

Owning the agreement.

Owning the executive relationship.

Running point if/when either party seeks to change direction.

### ✓ UPGRADE / EXPANSION

Helping Product/Service team with timing, packaging, strategy

Presenting scope to client and closing

# HUBSPOT'S VP OF CUSTOMER SUCCESS SPOKE **ABOUT IT YESTERDAY** ALISON ELWORTHY AND HER TEAM KNOW THEIR STUFF



How to Evolve Your Customer Success Strategy to Fuel Your Company's Growth Alison Elworthy, VP of Customer Success at HubSpot



### Learn more: Customer Success - The Third Growth Engine of Business

# **KEY RESOURCE** DEEP SPECIFICS FOR THIS FAST DEVELOPING BUSINESS DISCIPLINE:

### Why you want it for your team:

Customer success begins long before they become a customer (like, during the marketing and sales process).

Learn how the most successful companies are increasing retention and overall lifetime value of the deals they close. FOREWORD BY MARIA MARTINEZ President, Sales and Customer Success at Salestorce

# CUSTOMER SUCCESS

### HOW INNOVATIVE COMPANIES

ARE REDUCING CHURN AND

GROWING RECURRING REVENUE

MEHTA

STEINMAN

MURPHY

WILEY

# **OUR PLAYBOOK FOR INBOUND SUCCESS**

WITH HUBSPOT SALES HUB













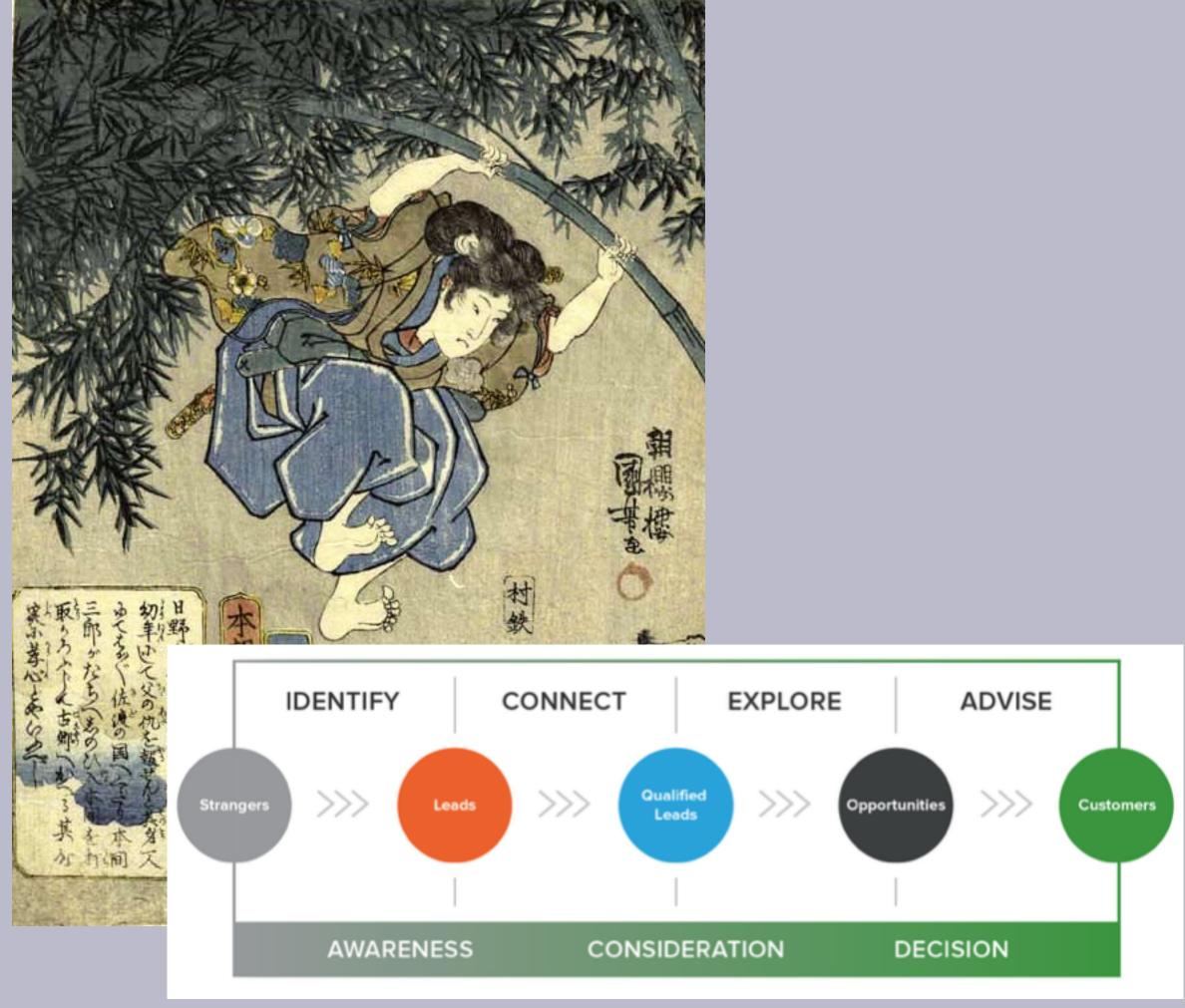
FOCUSING ON CUSTOMER SUCCESS



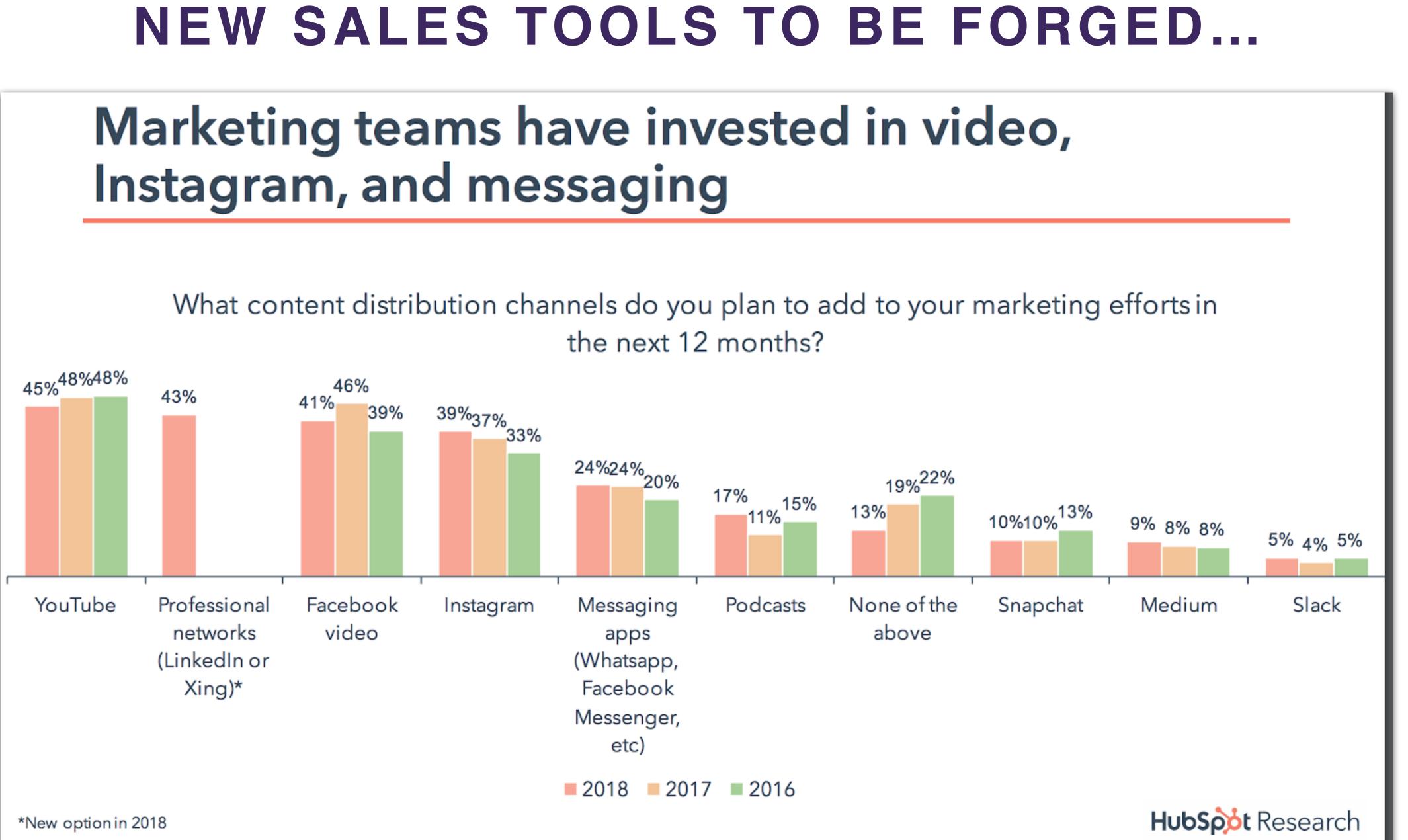


SUSTAINING TEAM SUCCESS AS WE GROW

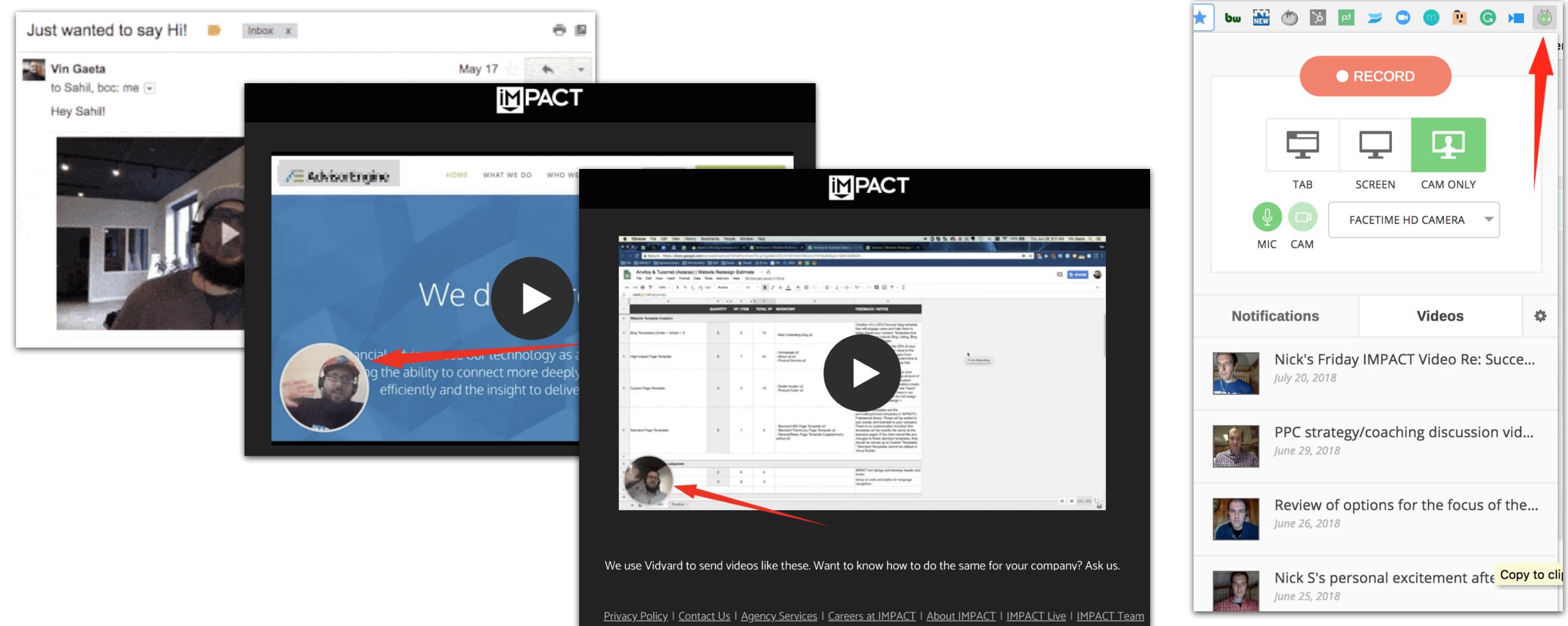
**EXPANDING THE INBOUND SALES** 'NINJA ARSENAL'



Source: Wikipedia, HubSpot



# **VIDEO IN THE SALES PROCESS:** MORE EFFICIENT, EFFECTIVE, AND MORE HUMAN COMMUNICATION TACTICS



### **RESOURCE:** 4 step-by-step scenarios that IMPACT used to deploy video

# HEAR IMPACT TALK ABOUT IT - TODAY! WE'RE PRESENTING WITH VIDYARD AT INBOUND&

How the IMPACT Sales Team is Crushing it with Video (and How You Can Too!)

When: Thursday, September 6 @ 2:15 PM ET

Where: Westin, Adams Room (Mezzanine Level)

Presenter: Tom DiScipio, IMPACT

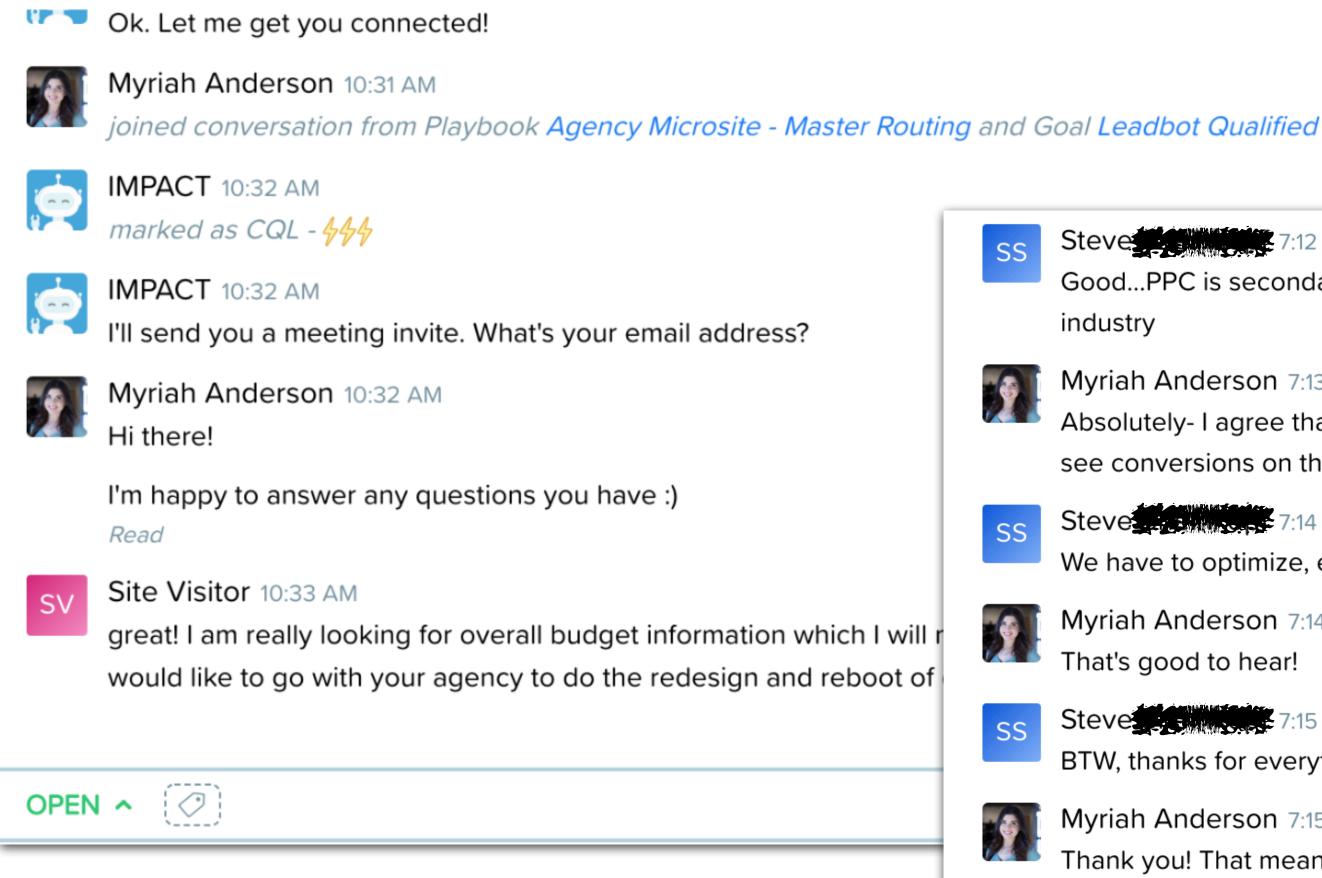


(tell them you heard about it here ;)



## Learn more: <u>'FIND VIDYARD DURING</u> **INBOUND 2018'**

# LEAD MANAGER/CONNECTION SPECIALIST OWNING LIVE CHAT



### Steven 3:12 AM

Good...PPC is secondary to SEO/blog....i want to change our site to be configurators..something very different for our

### Myriah Anderson 7:13 AM

Absolutely- I agree that it's really something different for your industry. I'll have to connect with Jason Rose, I'd love to see conversions on the configurators so far.

### Steve 7:14 AM

We have to optimize, etc....but they are pretty good

Myriah Anderson 7:14 AM

That's good to hear!

### Steve 7:15 AM

BTW, thanks for everything....I thought your work was excellent

### Myriah Anderson 7:15 AM

Thank you! That means a lot. I really enjoyed working with you all :)

# PODCASTING

Post

### Video





### IMPACT Branding & Design: The IMPACT Show Episode 54: Content Length, Marketing Skills for the Future, and Creating a Crisis Plan...

Nick and Steph are back LIVE for the IMPACT Show to wrap up your week! We'll be discussing the age old question of optimal content length, why you need a crisis plan, and a whole lot more at 11:00AM ET!

44:07 · Uploaded on 07/13/2018 · View Permalink ⊘

Shares

Performance for Your Post		i
Peak Live Viewers	16	>
() Minutes Viewed	647	>
Video Views	272	>
10-Second Views	152	>
Video Average Watch Time	1:14	>
Audience Retention		>
Audience and Engagement		>

### See our example: impactbnd.com/show

# **OUR PLAYBOOK FOR INBOUND SUCCESS**

WITH HUBSPOT SALES HUB













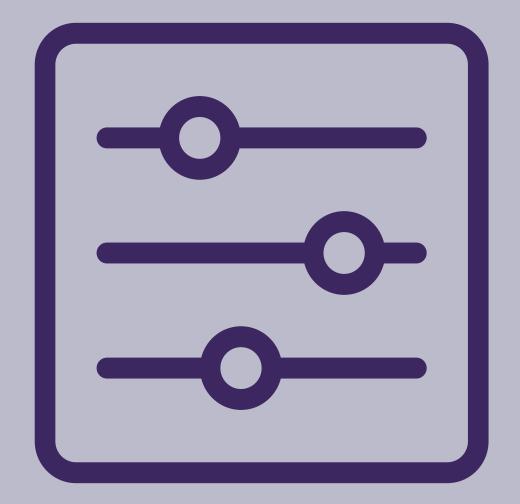
FOCUSING ON CUSTOMER SUCCESS





**SUSTAINING TEAM SUCCESS** AS WE GROW

# EPILOGUE: SUSTAINING SUCCESS AS THE TEAM GROWS



# FOCUSING ON "THE URGENT" PUTS PROCESS AND TRACKING AT RISK...

# Sustained Growth & Success - 60% Complete

### Grow Revenue - 63% (OFF TRACK) •

Hit the monthly revenue targets for each revenue channel

- Apr: \$544,771 (DONE) 0
- May: \$590,980 (88% MISSED) 0
- June: \$387,194 (OFF TRACK) 0



- Qtr: \$1,522,945 (OFF TRACK) 0
- Measure & Improve Sales & Success Performance 34% OFF TRACK • conversion rates, HubSpot Sold MRR, and individual performance
- Improve Sales & Success Operations 50% ON TRACK • development of Client Success Specialist Position, finalize and launch the Marketing & Sales SLA
- **Develop IMPACT's Strategic Partner Network 100% DONE** •
- Fulfill & Expand IMPACT's Sponsorship Program 47% ON-TRACK sponsorship program, setup IM Live 2019 Sponsors for Success

Develop more sophisticated, real-time dashboards to track leads/conversations booked to scheduled, Audit to Continuation

Complete Implementation of the Customer Success Manager role, development of Sales Operations Position,

Create a mutually beneficial, legal Partnership Agreement, develop onboarding program for Partners

Ensure delivery on promise of initial Sponsors, sell additional sponsorship and media, Finalize podcast



# MAINTAINING QUARTERLY OBJECTIVES + KEY RESULTS

This is the responsibility of the sales leader, in consultation with his direct team and peers on IMPACT's leadership team.

# **IMPACT's Q1 Objectives**

### **Sustained Growth & Success**

- Develop best fit matrix / Criteria for moving stages in updated process (with audit #2) - Launch by mid Jan
- Update the process & presentation deck to show offering updates (and audit etc)
- Update to the website to reflect offering updates (services offerings), get our top ranking for Inbound Marketing Agency back
- Revenue targets/goals (agency, education)
- Improve revenue and deal tracking (with all new things added)
- MSA is updated and quick to sign (Feb 14 <3)
- Sell 2 webinars

Q2 2018   Sales Objectives & Key Results (OKRs)		
OO: "Sustainable Revenue Growth"		
Revenue Targets (provided THINK onboards in April)		
• April: \$ =====		
• May: \$700		
o June: 💲 🕐		
Performance		
<ul> <li>\$XX,XXX sold of consulting / training / workshops</li> </ul>		
<ul> <li>CSM Objective (once rolled out): % portfolio revenue increase</li> </ul>		
<ul> <li># of audits sold / audit to MRR sold</li> </ul>		
<ul> <li>X new major clients (or audits) by EOQ (% of revenue increase / mo. / qtr.)</li> </ul>		
<ul> <li>Conversion rate of BOFUs from X to X (# of audits sold &gt; Audits to MRR</li> </ul>		
conversion)		
<ul> <li>HubSpot sold MRR goal</li> </ul>		
Operations		
<ul> <li>Client Success Manager beta launched by 4/15, full launch by 6/1</li> </ul>		
<ul> <li>Updated SOWs for each service offering</li> </ul>		
<ul> <li>Create Client Success Specialist role (onboarding, job description, metrics)</li> </ul>		
<ul> <li>Create Sales Operations Specialist role (onboarding, job description, metrics)</li> </ul>		
<ul> <li>Project plan for video content in sales</li> </ul>		

# **PEOPLE TOOLS: BECAME IMPORTANT TO HELP SCALE**

### **People Tools**

- Salary Tiers
- Job Descriptions
- Skill Definitions and Recomme
- **Quarterly Reviews**
- Core Value Definition Clarity
- Individual Development Plan

### This is a demo, not a training. Will been working on.

# IMPACT Individual Development Plan

Team member: NAME Date created: DATE

### Your Vision:

Professional Future positio

Personal Goal

**Financial Goa** 

Top 5 Strengt

2. 3.

	Short-term (1-2 years)	Long-term (3-5 years)
Goals: ions, tiers, career path		
als:		
als:		

ths (Personally and Professionally):	5 Opportunities for Growth:
	1. 2. 3. 4. 5.

### Quarterly Individual OKRs (3-5)



# ARE YOU A NEW LEADER OF INBOUND SALES NINJAS?

SALES · LEADERSHIP

# Managing a Sales Team: 7 **Lessons from a First-Time Sales** Leader



By: <u>Tom DiScipio</u> January 25th, 2018

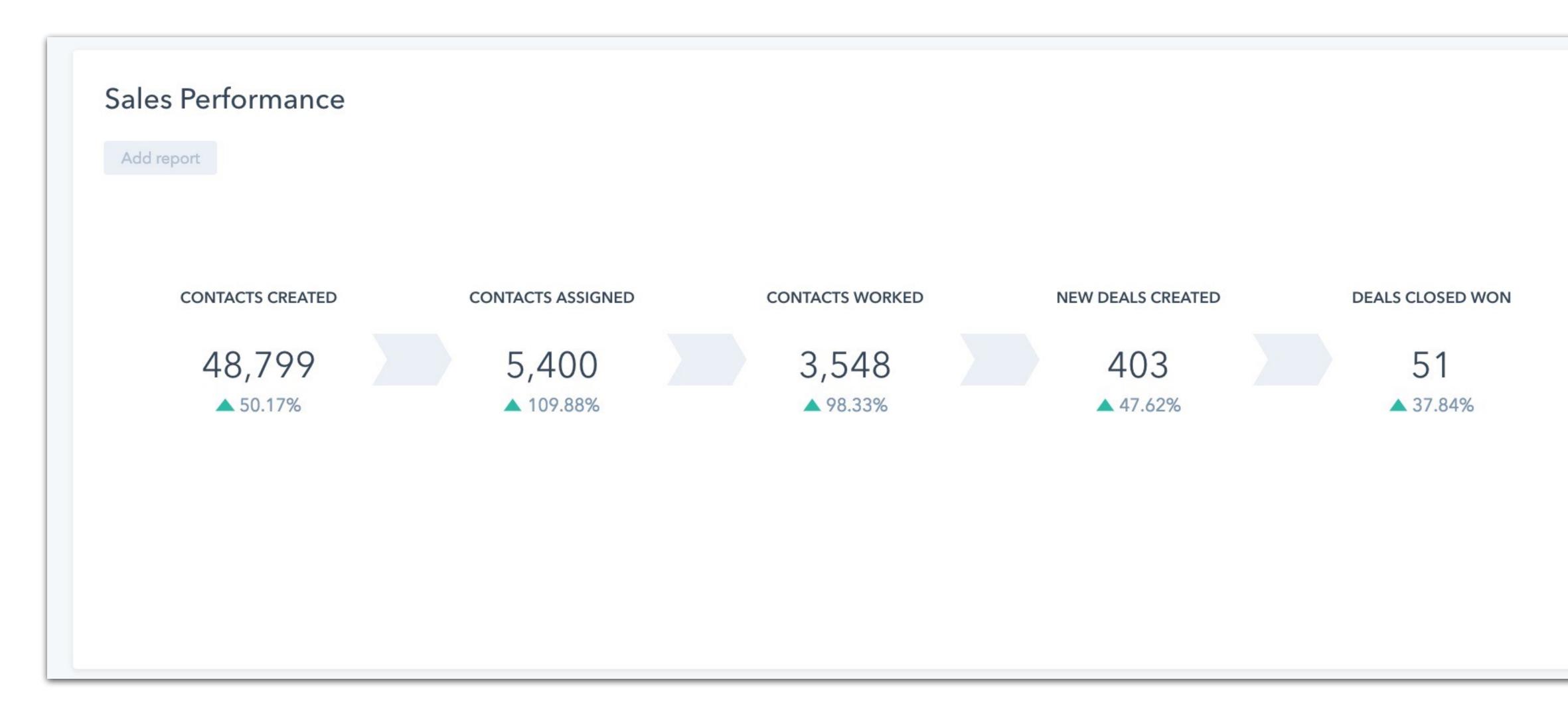


I wasn't always in Sales. I graduated college with a degree in Graphic Design and Presentation and minored in Art. My first real job out of college was working as a production associate at a local sign shop, assisting with digital design and installation of signage. Fortunately for me, the next step in my career was joining Bob in the early days of IMPACT, continuing the execution of creative work. As we grew

GET TO KNOW TOM DISCIPIO



# THE INVESTMENT IS <u>WORTH IT</u>, YOU'LL SEE!





# WANT TO LEARN MORE ABOUT HOW IMPACT DOES INBOUND (AND HOW YOU CAN TOO?)



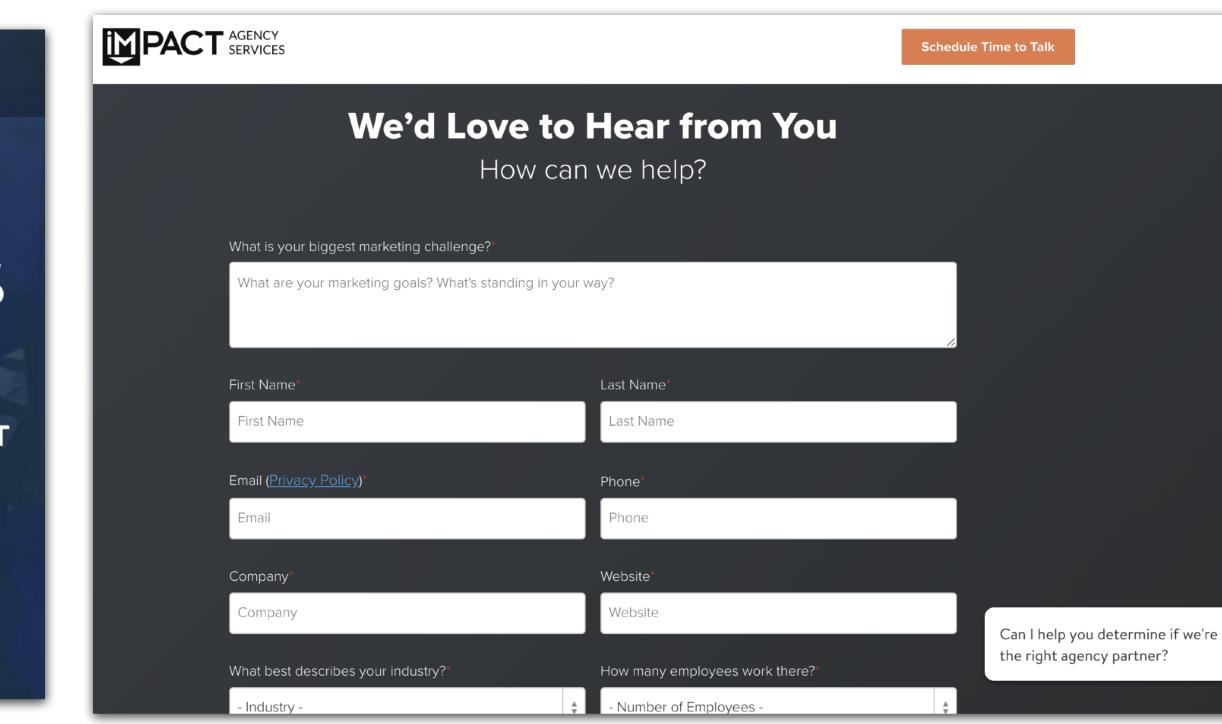
### WEBSITE & HUBSPOT THROWDOWNS LIVE! @INBOUND

Level up your website or HubSpot portal with expert advice for free at the IMPACT Booth in Club INBOUND! Space is limited, so don't wait.

(Note: Registrants must be attending the INBOUND 2018 event.)

**RESERVE MY THROWDOWN** 

### LET'S CHAT AT OUR BOOTH THIS WEEK **OR REQUEST HELP VIA OUR WEBSITE**







# QUESTIONS? WHAT'S YOUR EXPERIENCE?

**BE BOLD. ASK AWAY...** 



# **GET THE DECK**

### impactbnd.com/ninja

# **GET TO KNOW US**

Come find me at the IMPACT Booth

**MPACT** 

# LET'S CHAT

Let's connect at the event or online



