



### Goals

- |   |   |   |   |  |   |
|---|---|---|---|--|---|
| <ul style="list-style-type: none"> <li>• Generating leads from inbound interest</li> <li>• Starting client conversations through outbound actions such as emails/calls</li> </ul> | <ul style="list-style-type: none"> <li>• Closing qualified direct leads</li> <li>• Demoing and commercial guidance through POCs</li> <li>• Dedicated Pipeline Management function to endure deals are moving through funnel stages</li> </ul> | <ul style="list-style-type: none"> <li>• Closing qualified indirect leads</li> <li>• Partner onboarding and enablement</li> <li>• Demoing and commercial guidance through POCs</li> </ul> | <ul style="list-style-type: none"> <li>• Technical qualification and alignment of deals</li> <li>• Technical guidance through POCs</li> <li>• Technical demos and product enablement</li> </ul> | <ul style="list-style-type: none"> <li>• Post-sale client onboarding &amp; success</li> <li>• Retention of existing clients</li> <li>• Expansion of existing accounts</li> </ul> | <ul style="list-style-type: none"> <li>• Operational efficiency within the sales org</li> <li>• Training and development of sales reps</li> <li>• CRM cleanliness and data management</li> <li>• Sales Enablement should expand beyond training/coaching and proactively implement buyer-centric functions</li> </ul> |
|---|---|---|---|--|---|

### Considerations

- |   |  |  |  |   |  |
|---|--|--|--|---|--|
| <ul style="list-style-type: none"> <li>• SDR and BDR teams will sometimes report to Sales and sometimes to Marketing</li> </ul> | <ul style="list-style-type: none"> <li>• Direct Sales teams will often be broken down further by territories or key verticals, client headcount, client revenue, and/or ACV</li> </ul> | <ul style="list-style-type: none"> <li>• Indirect Sales teams may further be segmented into "Deal Makers," "Activation and Enablement Experts," and "Marketing and Relationship Builders"</li> </ul> | <ul style="list-style-type: none"> <li>• Sales engineering roles require a significant investment in training and product knowledge acquisition</li> </ul> | <ul style="list-style-type: none"> <li>• Post-sales teams will often be broken down further by territories, key verticals, or market segments.</li> <li>• They are often structured in parallel how to the Direct Sales team</li> </ul> | <ul style="list-style-type: none"> <li>• CRM admins will often have a broader role within the org but will have a close dotted line to sales</li> <li>• Some orgs will have a shared Revenue Ops team that reports to a CRO/CFO/COO</li> </ul> |
|---|--|--|--|---|--|