Proposal for Sales Enablement and Acceleration Services for Company XYZ

Prepared for: SAMPLE CLIENT
Updated: MONTH/ DAY/ YEAR

DIRECTIONS: HOW TO USE THIS GUIDE

Directions to come…

EXECUTIVE SUMMARY

Sample Company XYZ has seen tremendous success as a company, but now you're ready to grow faster and predictably. To this point, your company has attempted a variety of tactics to grow its sales, but you feel like there hasn't been a great degree of focus. Since you need a holistic approach to your sales, you are considering sales partner to join forces with you to reach your growth goals.

THE GOALS

You have a goal to work with 200 new customers within one year (average of 17/month). At your current close rate of 35%, you'll need to generate approximately 50 high quality leads per month, meaning that they reach the bottom of the funnel and become a sales qualified lead. If an estimated 20% of your leads move all the way through the funnel, you'll need to generate 250 top or middle of the funnel leads. Your current visitor to lead rate is 1.2%, but your goal is closer to the 3% rate.

In addition, your current connect rate is under 10%, your connect-to-opportunity rate is 20%, and your opportunity-to-customer rate is also 20%. That means in order to hit your sales goals you'll need to either generate X sales qualified leads for your "10-person" sales team, <u>OR</u> you will need to improve these three metrics by X%, Y%, and Z% respectively.

Moreover, you are not confident your existing sales process aligns to the way your prospects want to buy, nor are is your sales team adopting your CRM, making it nearly impossible to understand what's working and what isn't. Ultimately, this makes forecasting revenue complete guesswork which means your business cannot make advance investment decisions to fund future growth.

[SALES PARTNER NAME] PROPOSED PLAN TO OVERCOME CHALLENGES AND ACHIEVE GROWTH GOALS

PHASE 1: ASSESS (DAYS 1-30)

Sales Organization Effectiveness Audit
All of our client engagements start with a thorough understanding of where a client needs help. We often touch on various parts of this sales effectiveness audit during our business development and discovery process, but often find that going deeper early on saves our client headaches later in our relationship together. This includes the following six exercises and concludes with a summary presentation of findings to our clients:

Audit 1: Target Buyer Assessment
In this stage we'll examine your ideal customer profile — specifically, we want to know more about your target buyer profile (company-level) and target buyer personas (individual-level). We'll also look at existing documentation and training for team members in these areas.

Audit 2: Sales Process & Pipeline Management Assessment
In this stage we'll look at your existing sales process, sales playbooks, deal stages, exit criteria and more. The goal is to understand where, if at all, you have gaps in your sales process and pipeline management practices and recommend solutions.

Audit 3: Technology Stack Assessment
In this stage we'll inventory and assess all different technologies your sales, customer service, and marketing teams are using. The main goal of this stage is to understand the extent to which these tools are adopted, whether or not there are duplicate systems, and whether or not certain technologies may be missing.

Audit 4: Content Inventory and Assessment
Here, we'll look at all of the sales collateral your team has available. We want to develop an intimate understanding of how content gets created, by whom, for whom, how it gets stored, and how it's disseminated both internally and externally. We're interested in reviewing assets like: blog posts, ebooks, webinars, customer case studies, customer reviews/ testimonials, videos, sales presentations, and so on.

Audit 5: Sales and Marketing Alignment Assessment
In our experience, sales problems often stem from marketing problems. If you have a marketing team, we'll want to interview them to understand their perceived relationship with the sales team. Specifically, we'll want to understand things like: MQL/ SQL Definition, whether or not an SLA exists between the teams, reporting and collaboration practices.

Audit 6: Reporting/ Metrics Assessment
Concluding our assessment across the first 30 days, we'll take a look at all of your reporting capabilities and expose gaps. We will benchmark you against know metrics that you should be able in any world-class sales organization and will help you get started on that reporting if you're underperforming in any area.

PHASE 2: IMPLEMENT (DAYS 30-60+)

While we don't ALWAYS know what we will uncover in the initial sales effectiveness audit, we typically find that most clients need help in the following areas immediately following that exercise. We will tailor this to your needs after the initial discovery, but this is typically where we start:

Stage 1: The Basics (No reps involved)

- Basic CRM setup or sales acceleration technology setup
- User setup
- Permission setup
- Deal stage configuration and/or modification
- Web-to-CRM tracking tools
- Email integration and tracking for sales reps
- Calling integration
- Calendar and meeting integration for sales reps
- Custom field development
- Lead view setup
- Email template setup (x10 templates)
- Basic reporting setup

Stage 2: Rep and Manager Adoption

- Sequence creation and optimization (Minimum 3 sales automation sequences)
  - Usually for lead lifecycle stages and/or buyer journey stages

- Sales rep technology coaching
    - How to leverage email notification, calendar integration, templates, sequences

- Sales force automation workflows
    - Automated lead assignment (criteria based or round robin)
    - Lead notifications (tasks or internal emails* to reps based on lead score or prospect behavior)
    - Automated deal creation
    - Custom workflow development if necessary
        - (examples: copy value from a contact field to company field- cross object reporting, set a task for a renewal date)

- Lead Scoring
    - Predictive and custom lead scoring both possible, but we typically start with predictive

- Ongoing maintenance + training

PHASE 3: OPTIMIZE (DAYS 60, Onward)

<u>In addition to all work started in Phase 2</u>, we typically find that most clients need help in the following areas. Executing this work ensures the company has a strong acquisition funnel, an optimized process for getting MQLs and SQLs to sales reps at the right time, and a world-class sales process to bring new customers into your company's ecosystem.

- Sales Content Creation (Can include a mix of the following)
    - Competitive intel/ battle cards (one-time project)
    - Sales presentations
    - One-pagers/ explainer documents
    - ROI Reports/ Research/ Case Studies/ Testimonials
    - Video and Other Webinar Assets

- Blog posts for the purposes of ongoing lead generation, targeted at decision stages of the buyer's journey

- Lead Conversion Path Setup: From website visit to form submission to lead assignment

- Email templates and sequences targeted towards every buyer persona, at each stage of their journey

- Regular reporting

ADDITIONAL SERVICES/ CAPABILITIES, IF NEEDED

Most of these services fall outside the scope of our normal sales enablement and acceleration services because most of them are one-time projects. We work with all clients to customize their services agreement to ensure they achieve maximum results. Please inform us if you want quotes for any of the following services.

- Sales Coaching and Training (for reps and managers) - Starts at $2,000/ mo.

- Sales Playbook Development - Starts at $30,000 (one-time)

- Customer Case Studies - $1,000 per case study

- Customer Referral Program Management - Starts at $1,000/ mo.

- Customer Reference Program Management - Starts at $1,000/ mo.

- Custom Lead Scoring Assessments - Starts at $5,000 (one-time, or as needed)

- Custom Integration Work - Starts at $200/ hour

- Custom Data Migration - Price varies based on needs, systems, and complexity

- Technology Evaluation - Price varies based on needs, systems, and complexity

- Sales and Marketing Alignment Evaluations and Workshops - Starts at $5,000
    - Goal Setting / SLA Creation (SLA = Service Level Agreement)
    - Buyer Persona and Buyer Profile Development
    - Defining what constitutes a “qualified lead”

- Documenting, setting up, and communicating the lead hand-off process from marketing to sales and vice-versa (dispositioning)
- Sales/ Marketing communication/ feedback/ collaboration channel set-up (Slack, Google Forms, etc)
- SLA Reporting

HOW WE WILL DEFINE AND MEASURE SUCCESS

At the close of one year working together we will…

INVESTMENT

Full Sales Enablement and Acceleration Services: _______________USD $X/ MO.

OTHER FEES

HubSpot SalesHub ____________USD $X/ User/ Mo.
HubSpot Marketing Hub _____________ USD $X/ Mo.
HubSpot Reporting Add-On ______________ USD $200/ Mo.

TIMELINE

We are available to begin working with you and your team [INSERT DATE HERE].

TERMS & CONDITIONS

[PLEASE CONSULT AN ATTORNEY]

AGREEMENT

X____
Client Full Name:
Company Name:
Date:

X____
Sales Partner Full Name:
Sales Partner Company Name:
Date: