Sales Services Guidebook

How to Transition Your Business to Recurring Sales Services

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DIRECTIONS: HOW TO USE THIS GUIDE

Assumptions:
- Sales Partners charge between $100-$150/hour for deliverable services, $200-$250/hour for expertise services (services based on past experience only you can offer: sales coaching, consulting etc.)

Any sales services engagement should start with a thorough understanding of where a client needs help. Some of these exercises may be part of your sales process, other parts may happen after a prospect becomes a client. This should include one or more of the following exercises:

BASELINE BUSINESS ASSESSMENT: Sales Goals, Plans, Challenges, Timeline (+ Consequences/ Implications)

GOALS → Which goals has the client laid out for the year? Why do those goals matter? Are those goals nice to have or need to have? If nice to have, is there a need to have goal? If there's a need to have goal, why is it need to have? How well has the company performed in the past? What's the meaning behind the meaning of those goals? Who developed those goals? Who is held accountable to those goals?

CHALLENGES → Which challenges are preventing them from achieving those goals? Lead Generation/ Demand Gen/ Marketing, Rep Productivity, Organization (CRM), Reporting (do they know the shape of their funnel, top to bottom), Sales Process (does it exist, which parts are broken), Sales Rep Effectiveness (Connect Rates, Conversion Rates, Win Rates, Competitive Win/Loss Rates)

PLANS → What has the company tried to do in the past to overcome some of their challenges? How well did those things work? Why, or why not? What are they already planning to overcome challenges and/or meet their goals going forward? Who is involved in doing that work? To what extent are they confident that their plan will work? Why or why not?

TIMELINE/ CONSEQUENCES/ IMPLICATIONS → Is there a deadline for achieving certain goals or overcoming certain challenges? If there is, what is it? What's meaningful about that timeline? What happens if that timeline is missed (what's the real downside)? What happens if goals are met BEFORE that timeline (what's the upside?)?

PHASE 1: Sales Force Effectiveness Assessment/ Audit	
Description	*To be developed*
Timeline	*Phase 1: Months 0-1*
Suggested Price	*Varies, if part of your presale evaluation, $0. If post-sale, $3,000-5,000 (per month) one-time*
Estimated Effort	*1 to 2 months at 20-30 billable hours/ week*
Services Included	## 1. Target Buyer Assessment What are the buyer profiles? ● Are they documented? ● Where are they? ● How confident are they in those profiles? ● What process did they go through to develop those? Who was involved? ● How are team members (sales, marketing, services) trained on them? ● How confident are they in those personas? What are the buyer personas? ● Are they documented? ● Where are they? ● What process did they go through to develop those? Who was involved? ● How confident are they in those personas? ● How are team members (sales, marketing, services) trained on them? ● Have positioning statements been developed for these buyer personas? How do sales reps use these positioning statements during their sales process? Total Addressable Market and Territories ● What's the TAM? ● What's the penetration so far? ● Are there territories? If so, how do they get determined? <CONTINUED ON FOLLOWING PAGE>

2. Sales Process & Pipeline Management Assessment

- Training - How are reps trained on how to follow the sales process? Is there a playbook?
- Sourcing/ Prospecting - What are all of the steps involved in prospecting?
- Sales Stages - Is there a clearly defined sales process with discrete sales stages?
- Sales Stage Tracking - Where are the sales process steps tracked? How are reps held accountable?
- Deal-Stage Exit Criteria - Does each sales stage have clear, buyer-dependent exit criteria? Why or why not? How are reps and managers held accountable?

3. Technology Stack Assessment
- Which pieces of technology do sales reps/ the company use today?
- Email (Outlook, Gmail, etc)
- Calendar Management (HubSpot Meetings, Calend.ly, Youcanbook.me, etc)
- Phone (Landline, Softphone, Google Voice, Skype, etc)
- Power-dialers (ConnectAndSell, etc)
- Video/ Teleconferencing (Webex, GoToMeeting, Zoom, etc)
- Document Management (Desktop, Google Drive, Company Website, Internal Wiki, etc)
- CRM? (e.g. - HubSpot, Salesforce)
- Sales Acceleration (HubSpot Sales Starter/ Sales Pro, LinkedIn Navigator, Yesware, Salesloft, Outreach.io, etc)
- Chat (HubSpot, Drift, Intercom, etc)
- Marketing Automation? (e.g. - HubSpot, Pardot, Infusionsoft)
- Contract Management (Docusign, Pandadoc, Eversign, SignRequest, etc)

4. Content Inventory and Assessment
- Blog Posts
- Ebooks
- Webinars
- Customer Case Studies (ideally, industry-specific and company-size specific)
- Customer Reviews/ Testimonials

- Customer Reference Program
- ROI Reports / Other Research
- Videos (e.g. - Customer Case Studies, Product Overviews, "About"/ Explainer Videos)
- Product/ Service Overviews (Website, PDF, Decks, Videos, etc)
- Presentation/ Demo Decks (PDF, PPT, Drive, etc)

5. Sales and Marketing Alignment Assessment
- Is there agreement on ideal customer profile (buyer profiles, buyers personas) across sales and marketing team
- MQL/ SQL Definition
- Sales and Marketing Service Level Agreement
- Regular meeting/ reporting on SLA performance

6. Reporting/ Metrics Assessment
- Daily activity, per rep (email, call, social, chat, etc)
- Lead-to-Customer conversion rate
- Lead-to-Connect Conversion rate
- Connect-to-opportunity conversion rate
- Opportunity-to-Customer win rate
- Competitive deal win/loss rate
- % competitive deals
- Average sales cycle (days/ months)
- Average sales price
- Customer Revenue Retention (Dollars in, dollars out; includes upgrades/ cross-sell, etc)
- Customer Retention (Pure count of customers in, customers out)
- ...and more...

PHASE 2A: Basic CRM and/or Sales Acceleration Tech Setup	
Description	
Timeline	*Phase 2: Months 1-2*
Suggested Price	*$2,000-3,000*
Estimated Effort	*20 to 30 billable hours*
Product Recommendations	*HubSpot CRM, Sales Starter, Sales Pro, Reporting Add-on*
Services Included	- Install web to CRM tracking code and website form integration (30 minutes) - Email integration (hour) - Email tracking (30 minutes) - Call integration (30m) - Meetings integration (30m) - Custom Fields (hour) 3 Lead views (2 hours) - Sales/Customize deal stages (2 hour) - Existing vs. new accounts - product/service sold - sources 10 templates set-up (2 hours) - Reporting (1 hour) - Basic dashboard with out of box templates - Custom reports with Add On (add 2 hours) <hr> - Add-ons (optional): - Data Migration ($1000) - Targeted lead list ($500 per 100 contacts)

Resources: pre-made templates, sales coaching; Prospecting playbook template they can customize for clients

PHASE 2B: Advanced CRM and/or Sales Acceleration Tech Setup	
Description	*To be developed…*
Timeline	*Phase 2: Months 1-2*
Suggested Price	*$1,200-2,500*
Estimated Effort	*12 to 17 billable hours*
Product Recommendations	*HubSpot CRM, Sales Starter, Sales Pro, Reporting Add-on*
Services Included	*Sequence creation and optimization* - Create 3 sequences (3-5 hours) - Ideas for types of sequences: - Prospecting across 3 different personas - Lead Cycle: Booking connect call, following-up after a first meeting, re-igniting a dead deal - Buyer Journey: Ebook download, demo request - Ongoing optimization tips/refinement (2-3 hours a month) - A/B testing different approaches - Open rates/ click rates/ response rates *Coach on how to incorporate meetings into their process (2 hours)* - Email signature - Marketing emails - Embed on website - Back and forth *Workflows (3-5 hours)* - Automated lead assignment (criteria based or round robin) - Lead notifications (tasks or internal emails* to reps based on lead score or prospect behavior) *Using HubSpot Marketing here is ideal, but can create a workaround with a task triggered email* - Automated deal creation (if lead status is open to connected - trigger workflow to auto create a deal)

| | Prescribe custom workflows (examples: copy value from a contact field to company field- cross object reporting, set a task for a renewal date)
• Lead Scoring (2 hours)
   ○ Custom lead scoring (marketing)
   ○ Predictive lead scoring (sales pro)

• Ongoing maintenance + training (10-15 hours per month) |

PHASE 3: Ongoing Sales Enablement and Acceleration Services	
Description	*To be developed…*
Timeline	*Phase 3: Months 3 Onward*
Suggested Price	*$2,500-$5,000+, per month*
Estimated Effort	*20 to 30 billable hours*
Product Recommendations	*HubSpot CRM AND Sales Starter OR Sales Pro AND Reporting Add-on AND Marketing Starter, Basic, Pro*
Services Included	- Sales Content Creation* - Competitive intel/ battle cards *(one-time project)* - Customer facing shareable documents for each stage of the buyers journey 5-10 blog posts targeted at decision stage of buyer's journey - Create customer referral program/reference program *5-10 hours per month* - Create Templates and Sequences targeted towards every buyer persona, at each stage of their journey - Online reputation management (go to review sites, send starbucks gift cards to best customers to write reviews for you etc.) - Create blog content - Regular reporting *pro tip: repurpose as much old content as you can, or outsource this to companies like Upwork, MPULL, WriterAccess, etc.

ADD ON, RECURRING SALES COACHING/ TRAINING

Description	*Recurring, or one-time sales coaching and training services, as needed or requested by your client. Typically, this is reserved for front-line reps and/or managers, including regular consultation with Directors, VP Sales, CEO, etc.*
Timeline	*As needed*
Suggested Price	*Varies greatly; $1,000-$8,000, per month*
Estimated Effort	*10 to 40 billable hours, per month*
Product Recommendations	*HubSpot CRM AND Sales Starter OR Sales Pro AND Reporting*
Example/ Suggested Services Included	- Call coaching/film review 1:1 Coaching - Set-up the dialer and call queues with training for reps - Behavior based calling/outreach (email notifications, website notifications and triggers such as funding, mergers, new hires) - Sales process training: prospecting, qualifying, presenting and closing - Competitive positioning - Negotiation training - New product/service training - Accountability dashboard (KPI based: # of calls, # of opps, close rates, funnel report)* - General sales management duties (examples: activity enforcement, crm usage, developing sales soft skills, role plays, hiring) - SDR Services** <hr>*Need sales pro to create custom widgets and have 2 dashboards, need reporting add-on to create more than 2 dashboards **Can be outsourced/ white-labeled; contact your HubSpot Sales Partner Manager to learn more.

ADD ON, ONE-TIME CLIENT PROJECTS

Custom Project Type	Suggested Price
Technology Evaluation	
Sales and Marketing Alignment Evaluations and Workshops ● 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/ collabroation channel set up (Slack, Google Forms, etc) ● SLA Reporting	$5,000-$25,000
Sales Playbook Development	$30,000-$60,000
Customer Case Studies	$1,000/ case study
Custom Lead Scoring Assessments	$5,000+, one time
Custom Integration Work	$100-200/ hour
Custom Data Migration or Integration	Varies based on complexity

ORIGINAL CONTENT/ OLD

SAMPLE PROJECT/RETAINER COMBO:

MONTH 1
Audit and Implementation Phase 1
Optional add-on: Data migration

MONTH 2
Implementation Phase 2
Optional add-on: Custom integration work

MONTH 3
Begin ongoing services: Sales Enablement Retainer **
Optional add-on: Sales playbook development, sales and marketing alignment

MONTH 4-8
 >>This work is all IN ADDITION TO the Sales Enablement Retainer (Month 3)<<
Continuation of sales enablement work, while adding Sales Coaching Retainer **
Optional add-on: Customer case studies, lead scoring assessments, custom
integration/migration work, tech evaluation

***Ongoing retainer fees are dependent upon hours spent on services per month which is
dependent upon individual client need for services*

Outcomes:
x% (10,15, 30?) in rep efficiency by adopting HubSpot
x% in improved close rates by adopting HubSpot
=_____ dollars in revenue for company based on their ASP