BUILD A STRATEGIC SALES PROCESS

Where to Start and How to Scale

REVEGY®

THE 5 STAGES OF THE SALES EXECUTION MATURITY MODEL

Ad Hoc

Tactical

Integrated

Intelligently Managed

Strategic

To build a sales funnel that generates predictable revenue, you need to take an honest look at your sales organization's level of sophistication and understand the path to improvement. A maturity model can provide that roadmap for you.

Most organizations aren't mature enough to generate predictable revenue streams. Rather than aligning people, processes, and technology to provide maximum value to clients, they engage in ad hoc tactics with no consistency or transparency.

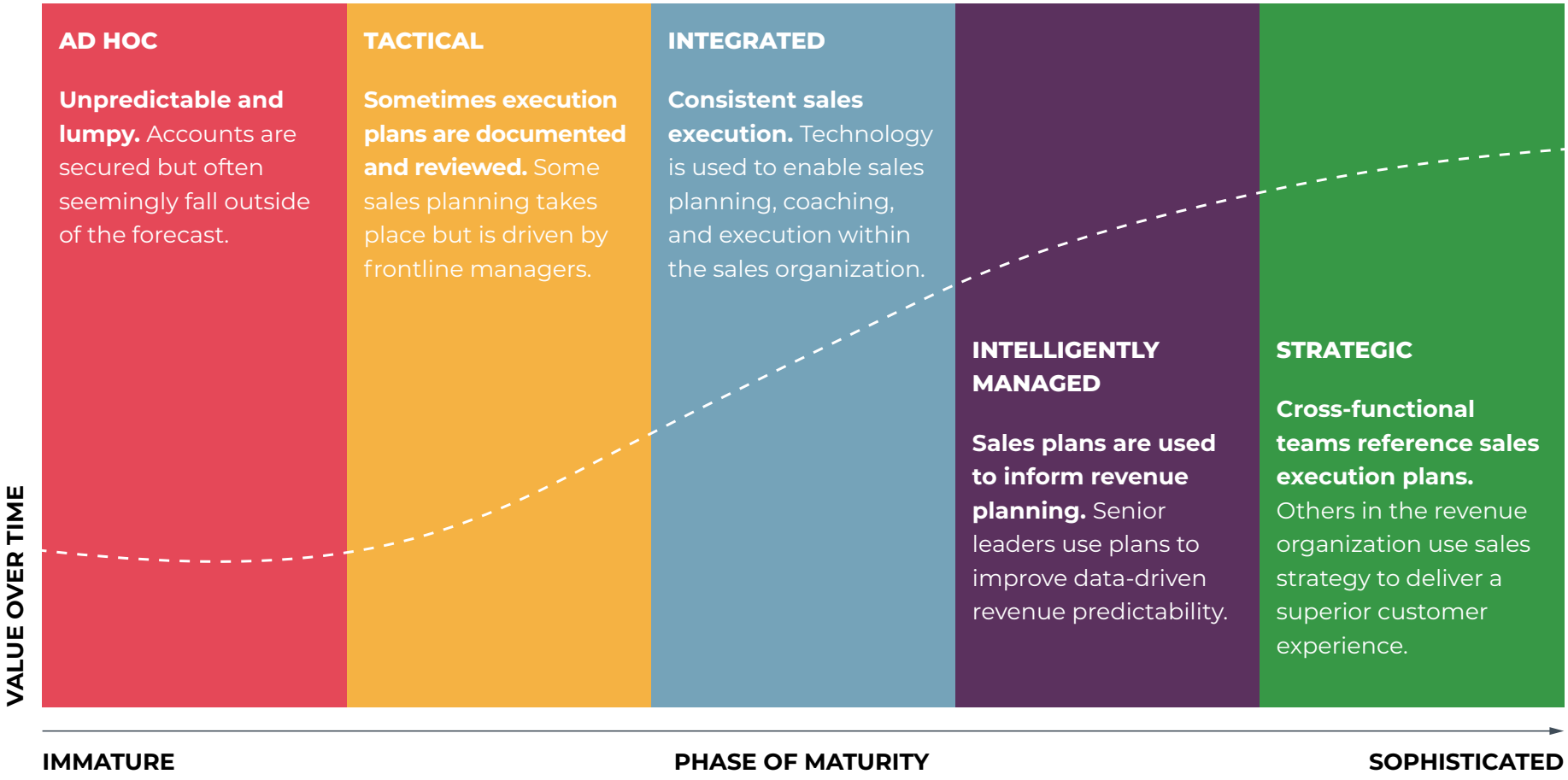
ABM is giving way to Account-Based *Everything*: the coordination of Marketing, Sales, and Customer Success efforts to engage and convert target accounts. According to Gartner, this new approach yields a **75% increase in ACV and a 150% increase in LTV**[1] and is necessary to land key accounts predictably.

[1] Gartner, 2019: https://www.gartner.com/en/articles/the-account-based-everything-framework

This guide will tell you everything you need to know about the Sales Execution Maturity Model and how movement along that curve can have a **huge impact on revenue generation.**

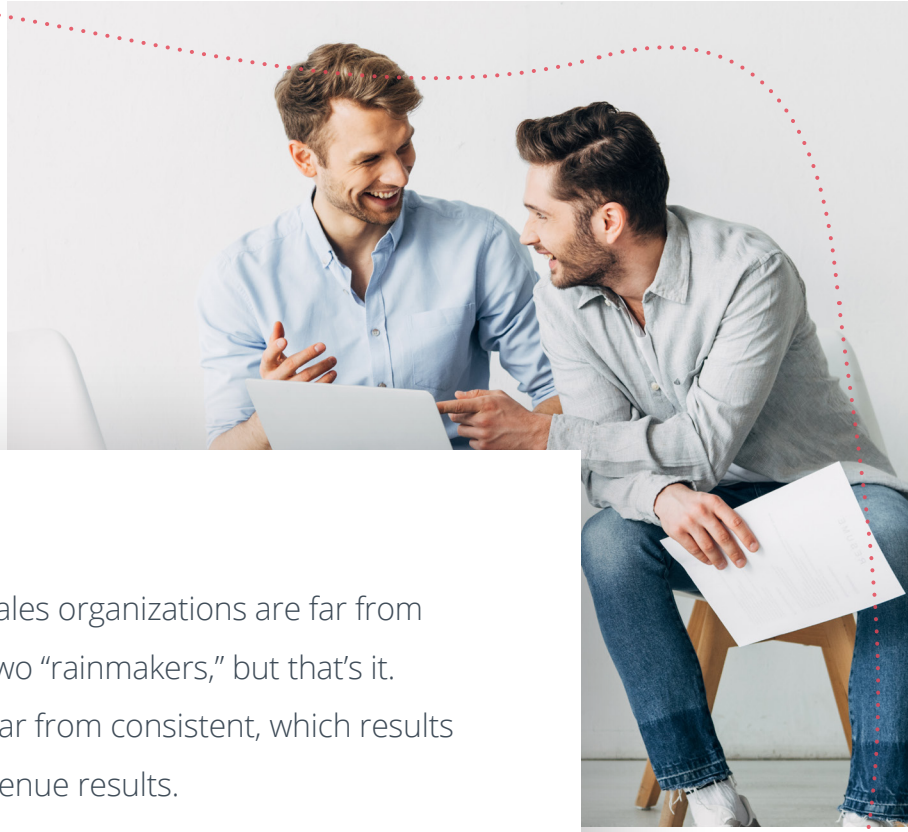
In the following pages, we will walk you through the stages in detail. To ground us in a common framework, **here are the phases of maturity side-by-side.**

SALES EXECUTION MATURITY MODEL



STAGE 1:

Ad Hoc



At their most immature state, sales organizations are far from aligned. You may have one or two "rainmakers," but that's it. Your team's sales motions are far from consistent, which results in lumpy and unpredictable revenue results.

When you don't know how much revenue is coming in next quarter, you can't make the long-term investments and plans that are necessary to scale your business.

The only way out of the Ad Hoc stage is to start aligning your **people, processes, and technology** to move in a consistent direction.

STAGE 2:

Tactical

In the Tactical stage, some of your teams will follow a specific, repeatable process under the leadership of a frontline manager. Processes may include:

- Identifying **customer goals** and articulating how your offering helps achieve them
- Generating **relationship maps** to identify all parties involved in the decision-making process
- Developing **close plans** to document your standard sales motions
- Tracking **usage reporting** of your sales technology and methodologies

While this is better than the Ad Hoc approach, each frontline manager is following a different process. Some teams are doing well, others not so much. If you want a repeatable, predictable pipeline, everyone needs to be **rowing in the same direction.**

STAGE 3:

Integrated

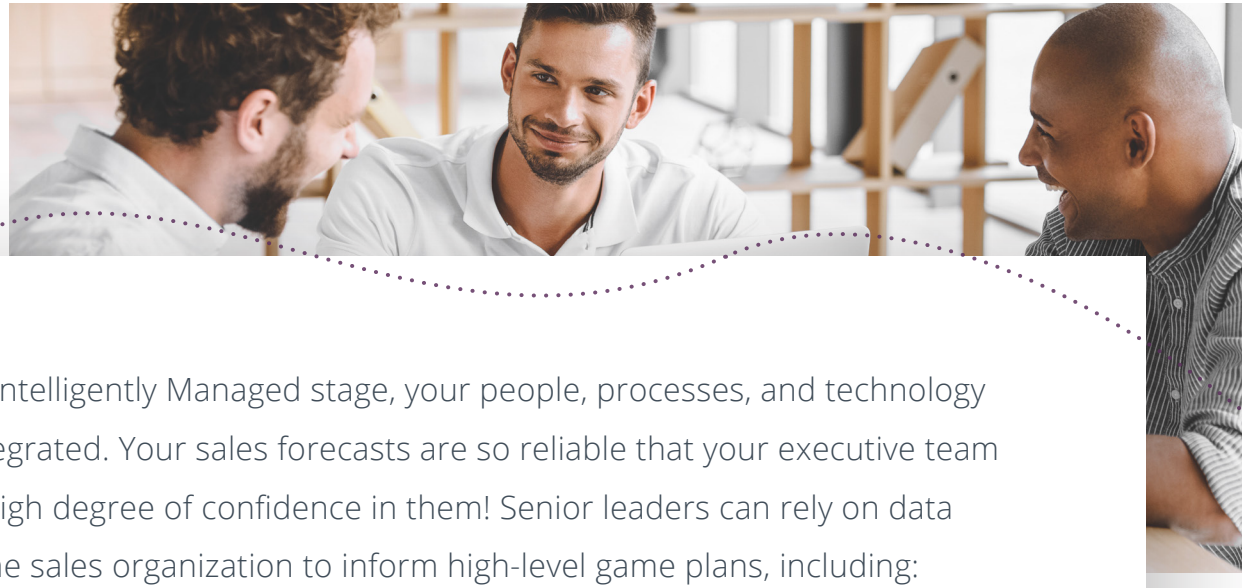
In the Integrated stage, all of your teams are aligned under a single process, enabling consistent execution. As a result, you'll start to see predictable revenue streams. Common motions at this stage include:

- Developing **strategy maps** that connect your value prop to key customer objectives
- Identifying **white space and revenue growth ideas** based on expansion opportunities within the account
- Creating **scorecards** to track rep performance and improvement areas
- Measuring **base analytics** to ensure the needle is moving in the right direction

You've won a major battle by getting to this stage... but beware: even if your teams are currently aligned, you need **buy-in from the top down** to keep this up over the long haul.

STAGE 4:

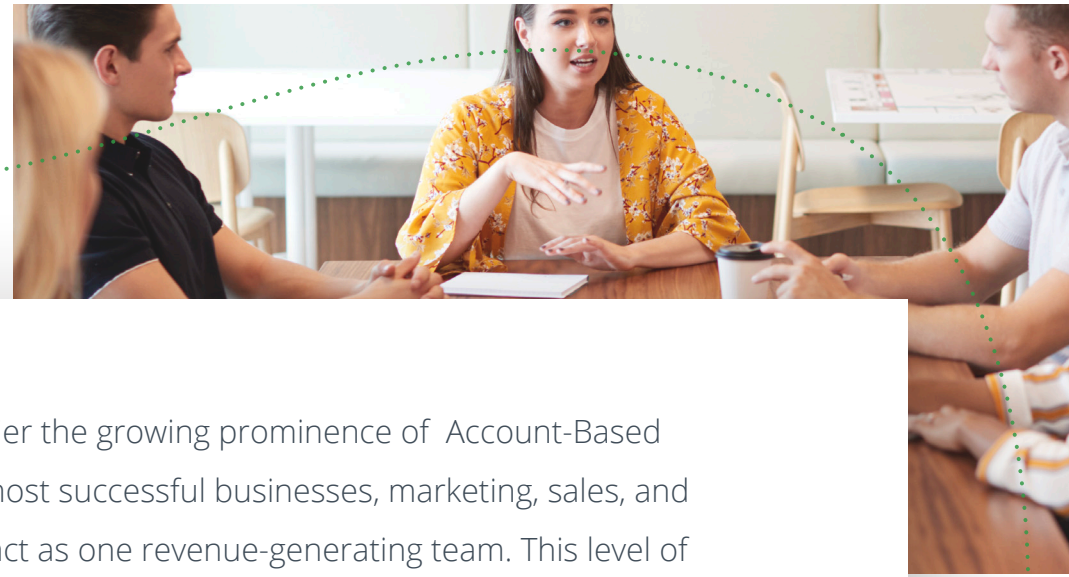
Intelligently Managed



At the Intelligently Managed stage, your people, processes, and technology are integrated. Your sales forecasts are so reliable that your executive team has a high degree of confidence in them! Senior leaders can rely on data from the sales organization to inform high-level game plans, including:

- Developing **advanced account plans**, using the right tech platforms to focus your efforts where you have the greatest revenue opportunity
- Creating **playbooks** to ensure consistent application of your methodology across teams
- Tracking advanced **analytics** to make reliable predictions on anticipated revenue growth

Now that revenue is predictable, executives trust the sales plan to inform revenue planning, business strategy, growth objectives, and future investment strategies. However, there's still one obstacle in the path toward a fully predictable revenue organization: **cross-functional buy-in and integration.**



STAGE 5:

Strategic

We mentioned earlier the growing prominence of Account-Based Everything. In the most successful businesses, marketing, sales, and customer success act as one revenue-generating team. This level of maturity means:

- **Marketing hits target accounts with content** along the buying journey and throughout the customer lifecycle
- **Sales engages in one-to-one, personalized conversations** with prospects, informed by marketing data
- **Customer Success proactively finds upsell and cross-sell opportunities**, monitors customer health, and works with marketing and sales to execute retention plays

Only when all three departments are rowing in the same direction will you have a truly strategic, consistent revenue-generating organization. It's nirvana.

THE KEY INGREDIENTS:

People Processes Technology

Now that we've walked through an overview of the model itself, let's talk about the ingredients you need to move toward consistent, predictable revenue growth: **people, processes**, **and technology**.

Technology doesn't work auto-magically. Just because you have a CRM doesn't mean your people know how (and are willing) to use it.

Processes are easy to design, but they don't work unless people follow them and leverage technology to track progress digitally.

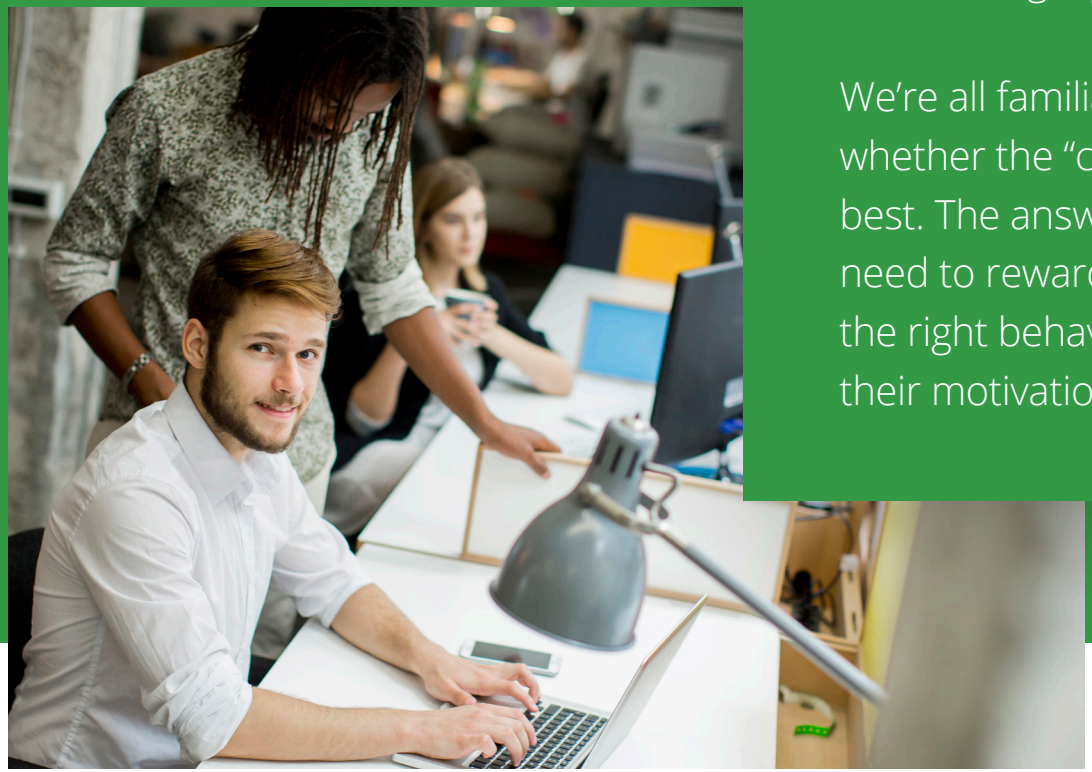
People get lost without processes and technology to guide their actions. This is by far the most challenging element.

THE KEY INGREDIENTS:

People

Processes

Technology



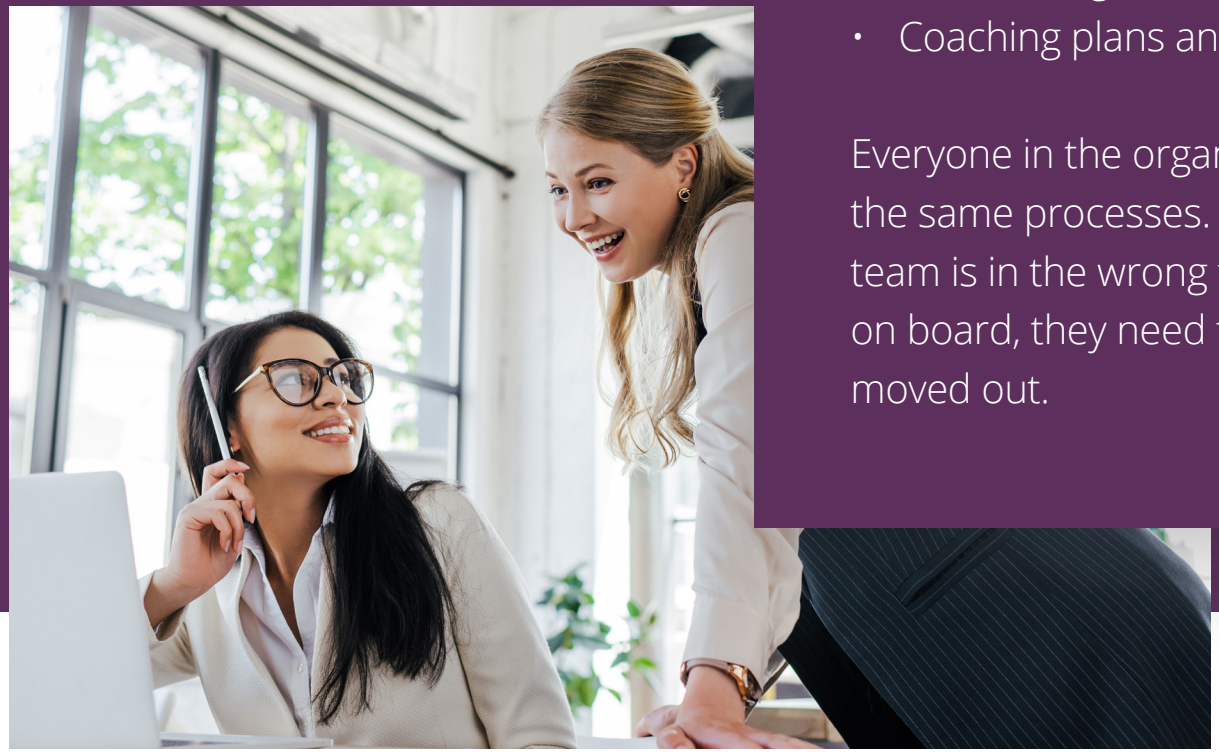
Anyone can buy technology or write up a process. But finding great people? That's hard.

Humans are, to put it frankly, wild cards. This is why training, coaching, and leadership buy-in are critical to maturing your organization and establishing a predictable funnel.

We're all familiar with the age-old debate about whether the "carrot" or "stick" approach works best. The answer is a combination of both. You need to reward team members and incentivize the right behaviors, but you can't solely rely on their motivation and willingness to change.

THE KEY INGREDIENTS:

People
Processes
Technology



If you want reliable sales execution, you need a consistent process. It's the sheet of music from which the entire orchestra plays. These can include:

- Close plans
- Sales methodologies
- Onboarding and training sessions
- Coaching plans and cadences

Everyone in the organization should be using the same processes. A play doesn't work if your team is in the wrong formation. If someone isn't on board, they need to be managed, coached, or moved out.

THE KEY INGREDIENTS:

People
Processes
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You don't need a huge tech stack to generate measurable, predictable sales. You just need the few platforms you have to be best-in-class and fully integrated. Here are a few sales tech categories you might begin with:

- CRM/data lake
- Sales execution platform
- Sales research/intelligence tool
- Sales engagement tool
- Conversational intelligence tool

Keep in mind that having technology isn't the same as having an execution strategy. We've all heard sales leaders say, "If it's not in Salesforce, it doesn't exist." These tools are only effective if a) they are populated with current data and b) your team can pull out insights that help provide value for your prospects and customers.

How to Stay Strategic Long-Term

Getting to the Strategic stage is a significant accomplishment. If you aren't vigilant, you run the risk of losing your hard-won predictable funnel. Don't get complacent—it's the equivalent of saying "I'll be right back" in a horror movie.

Here are a couple of things to watch out for:

1 Sales Leadership Turnover

Ideally, a new leader would stick with your established processes and technology. Given that the average tenure of a CRO is 18 months,[2] turnover and frequent change is a big risk. Any leader, new or old, is more effective when they're given a solid foundation. It sets them up for success on day one.

2 Missed Expansion Opportunities

Backsliding from the Strategic phase will inevitably lead to missed cross-sell or upsell opportunities or worse—churn. You have a 60-70% success rate with expansion deals versus 5-20% when selling to net new opportunities.[3] Don't make life harder than it has to be!

[2] Revenue Architects, 2020: https://revenuearchitects.com/blog/chief-revenue-officer-success-first-90-days/
[3] Invesp, 2020: https://www.invespcro.com/blog/customer-acquisition-retention/

CONCLUSION:

Becoming Strategic, One Step at a Time

Going from Ad Hoc to Strategic isn't something that happens overnight. That's why when we coach customers on **building more strategic, predictable funnels,** we take a multi-step approach that consists of three phases. This way, our customers can align their people, processes, and technology in a way that sets them up for long-term success and revenue growth.

The Revegy platform is designed to be adaptable to your unique sales process, wherever you are on this journey. It's purpose-built by salespeople, for salespeople. Our goal is to help you optimize revenue, increase collaboration, and visualize critical account intelligence.

We hope you use the information in this guide to generate more predictable revenue and provide a better customer experience through intelligent sales execution. **When revenue teams are able to serve customers better, we all win.**

Ready to take it to the next level?

Get started with the #1 account-based sales execution platform.

Request a Demo

About Revegy

Revegy is the global provider of only sales execution platform for account-based selling. The Revegy platform is a game-changing source of insight for sales teams, helping them build trusting relationships within the key accounts that fuel revenue. Founded in 2005, Revegy helps sales teams streamline sales processes, increase revenue, and create a predictable pipeline using our account planning and execution solution. More than 50,000 users from industry-leading companies like Fujitsu, Comcast, Capgemini, and Worksoft rely on Revegy to manage over $30 billion in revenue. For more information, visit revegy.com.

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