

2025 SBI SPRING REGIONAL SUMMIT

MAY 13-14, 2025 ATLANTA, GEORGIA

BLUEPRINT

for Sustainable Growth



Driven by Insights
Delivered from Experience

Re-Setting Your Go-to-Market Strategy (and Yourself) for a Strong H2

JD Miller, Author & Advisor



The background is a solid blue gradient with a dense pattern of white, semi-transparent business-related icons. These icons include gears, lightbulbs, bar charts, line graphs, target symbols, and network diagrams, scattered across the entire surface.

How many of us are
at or above plan for the year?

We knew the building blocks ...



CUSTOMER
RENEWALS



PRICE
INCREASES



NEW LOGO
SALES



PARTNER
SALES



NEW
PRODUCTS

We knew the building blocks ...

BETTER



CUSTOMER
RENEWALS

MORE



PRICE
INCREASES

MORE



NEW LOGO
SALES

A NEW ONE



PARTNER
SALES

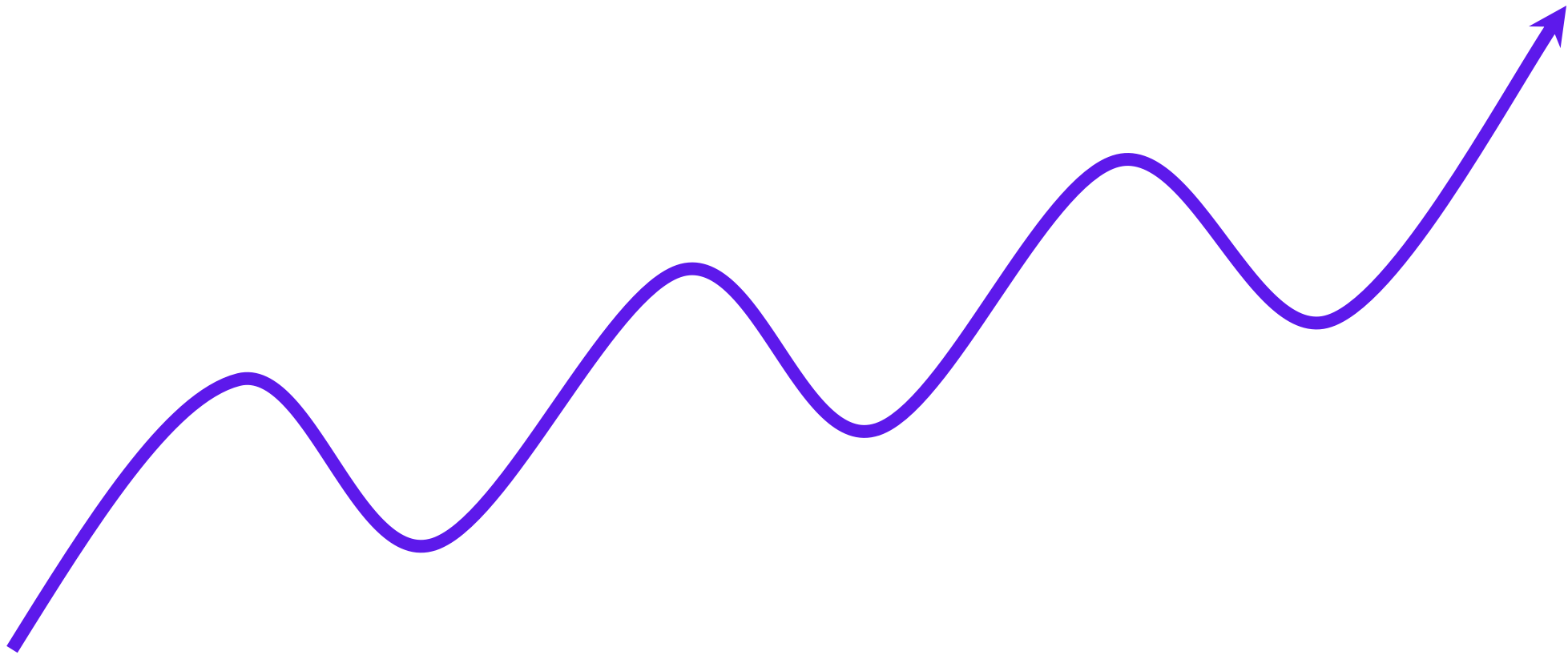
2ND HALF



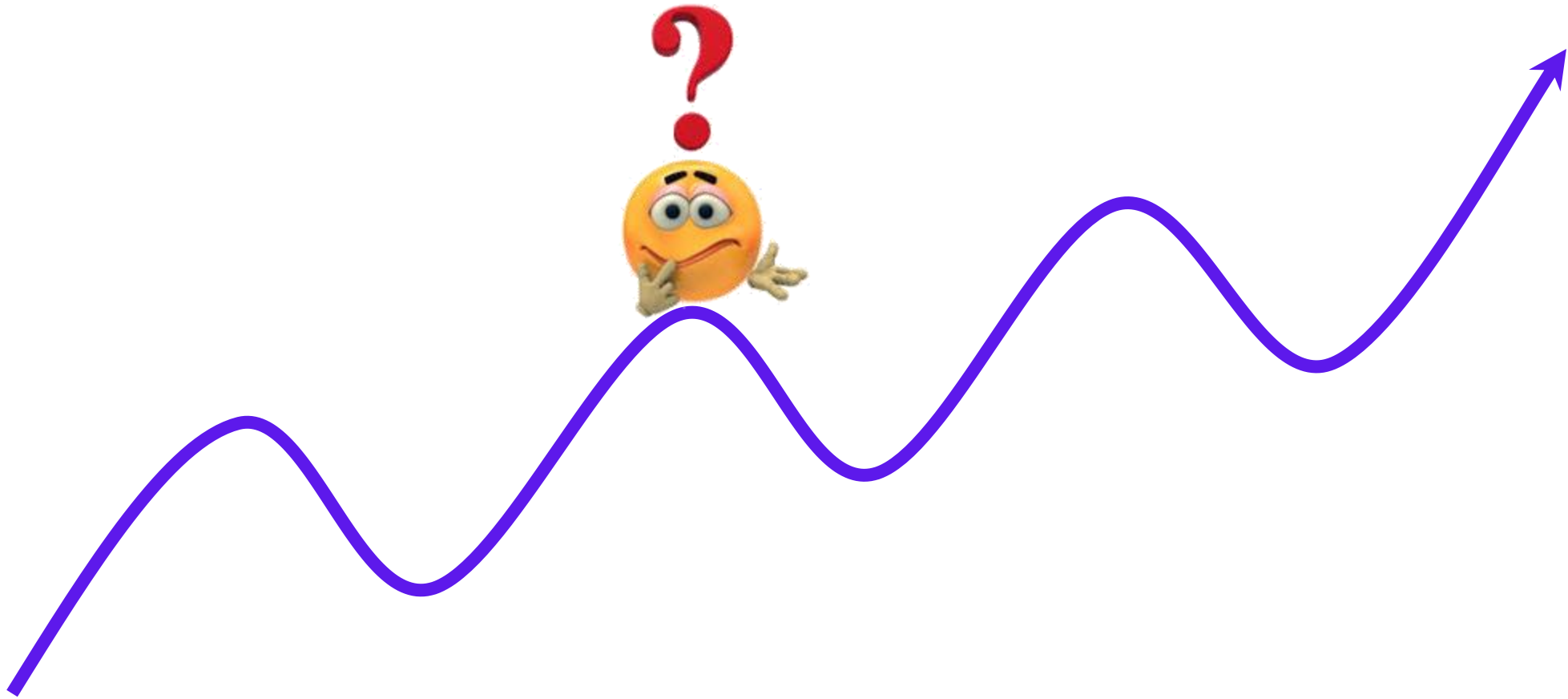
NEW
PRODUCTS

... but not the targets.

We know there is seasonality to the business



... but are uncertain if our progress is enough



Two key benchmarks

91%

COMPANIES THAT MISSED QUOTA IN 2024

Two key benchmarks

91%

COMPANIES THAT MISSED QUOTA IN 2024

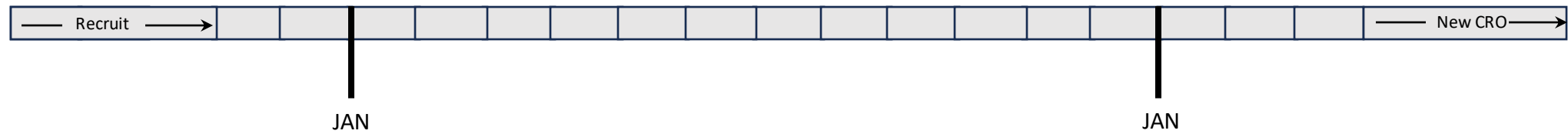
<https://www.quotapath.com/blog/sales-teams-miss-quota>

18
months

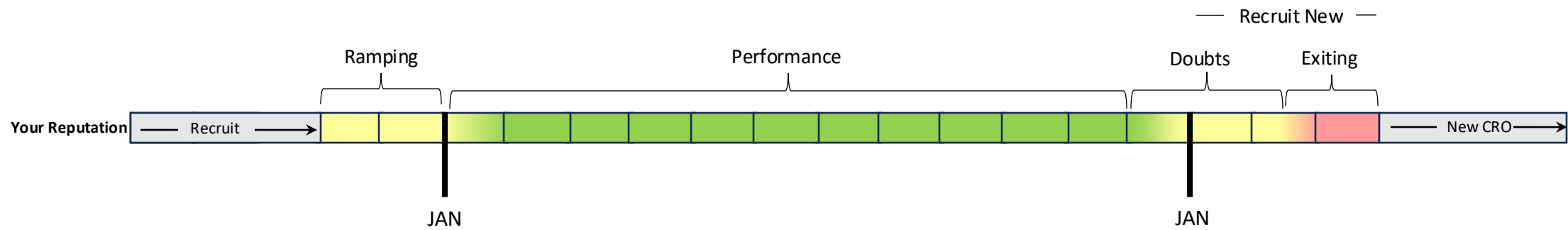
AVERAGE CRO TENURE IN 2024

https://www.linkedin.com/posts/nicktoman_striking-but-not-surprising-visual-of-cro-activity-7250593170722287616-NjJP

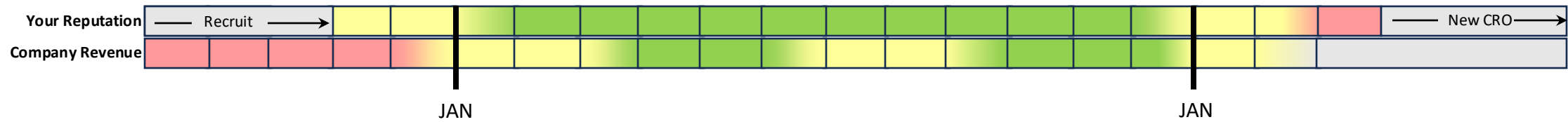
What happens in those 17 months?



What happens in those 17 months?




What revenue performance could we really have expected?



The background is a blue gradient with a pattern of faint, light-blue business-related icons. These icons include gears, bar charts, line graphs, target symbols, lightbulbs, and network diagrams, creating a professional and analytical atmosphere.

It's not about missing the number.

**It's about poor communication
about the number.**

The image features three stylized human figures, each represented by a light gray circle for a head and a light gray rounded rectangle for a torso. Each figure has a white speech bubble pointing towards it. The background is a solid dark gray. The first figure on the left has a speech bubble that says 'We're going to work hard and redouble our efforts.' The middle figure has a speech bubble that says 'We're going to find another, higher gear.' The third figure on the right has a speech bubble that says 'We're going to get creative and really dig deep on deals.'

We're going to work hard
and redouble our efforts.

We're going to find another,
higher gear.

We're going to get creative
and really dig deep on deals.



We're going to work hard
and redouble our efforts.



We're going to find another,
higher gear.

We're going to get creative
and really dig deep on deals.



Step 1: Document your assumptions


The background of the slide is a circular gradient transitioning from blue on the left to purple on the right. It is filled with a dense pattern of small, light-colored icons representing various business and technology concepts, such as gears, lightbulbs, bar charts, line graphs, target symbols, and network diagrams.

Document a one-page annual plan


In 000's													
Bookings By Team By Month													
	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEPT	OCT	NOV	DEC	TOTAL
Sr. New Logo	0.15552	0.23328	0.3888	0.171072	0.256608	0.42768	0.171072	0.256608	0.42768	0.279936	0.419904	0.69984	3.888
Jr New Logo	0.0864	0.1296	0.216	0.09504	0.14256	0.2376	0.09504	0.14256	0.2376	0.15552	0.23328	0.3888	2.16
Install Base	0.10368	0.15552	0.2592	0.114048	0.171072	0.28512	0.114048	0.171072	0.28512	0.186624	0.279936	0.46656	2.592
New Product						0.045	0.075	0.125	0.3	0.366	0.366	0.415	1.692
Renewal	1.3824	2.0736	3.456	1.52064	2.28096	3.8016	1.52064	2.28096	3.8016	2.48832	3.73248	6.2208	34.56
Total Bookings	1.728	2.592	4.32	1.9008	2.8512	4.797	1.9758	2.9762	5.052	3.4764	5.0316	8.191	44.892

Document a one-page annual plan


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In 000's														
Pipeline Needed By Team By Month	Assumption: Install Base wins 80% within 2 months, Jr Wins 29% in 4 months, Sr. wins 32% in 6 months, new product wins 20% in 2 months													
	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEPT	OCT	NOV	DEC	TOTAL	
Sr. New Logo	0.5346	0.8019	1.3365	0.8748	1.3122	2.187	2.15						19.197	
Jr New Logo	0.327724	0.491586	0.81931	0.327724	0.491586	0.81931	0.536276	0.804414	1.34069	7.448276			13.4069	
Install Base	0.324	0.14256	0.21384	0.3564	0.14256	0.21384	0.3564	0.23328	0.34992	0.5832	3.24		6.156	
New Product Pipeline				0.225	0.375	0.625	1.5	1.83	1.83	2.075			8.46	
Total Pipeline Created	1.186324	1.436046	2.36965	1.783924	2.321346	3.84515	14.54268	2.867694	3.52061	10.10648	3.24		47.2199	

A white silhouette of a person's head and shoulders on a dark gray background.

We didn't hire or ramp
our new sellers fast
enough.

A white silhouette of a person's head and shoulders on a dark gray background.

We were two months delayed
on the product rollout.

A white silhouette of a person's head and shoulders on a dark gray background.

Customers aren't taking as
big a price increase as we
expected.

A new logo scorecard

Opportunity Count

Opportunity
Size

Win
Rate

x \$ x %

=

V

Sales
Velocity

L

Length of Sales Cycle
(in days)

A second-half account management plan

Customer	Renewal Month	Increase Allowed	Satisfaction	Multi-Year	STRATEGY	JUL	AUG	SEPT	OCT	NOV	DEC
Apex Zenith Group	July	2%	YELLOW	NO	Multi-year with 0%	\$ 44,516.00					
NovaWave	August		GREEN	NO	Multi-year with 2%		\$ 276,430.00				
Stellar Synergy	August	2%	GREEN	YES	2%		\$ 15,796.00				
LuminaCore	September	6%	GREEN	YES	6%			\$ 589,478.00			
Quantum Innovations	September	0%	GREEN	YES	0%			\$ 138,574.00			
Veridian	October	2%	RED	YES	Churn				\$ 310,176.00		
Ethos	October		GREEN	YES	5%				\$ 115,239.00		
TerraForge	November		YELLOW	YES	Multi-year with 0%					\$ 568,656.00	
Chronosync Tech	December	7%	YELLOW	YES	3.50%						\$ 216,118.00



Step 1: Document your assumptions

Step 2: Communicate the disconnect
and a correction plan







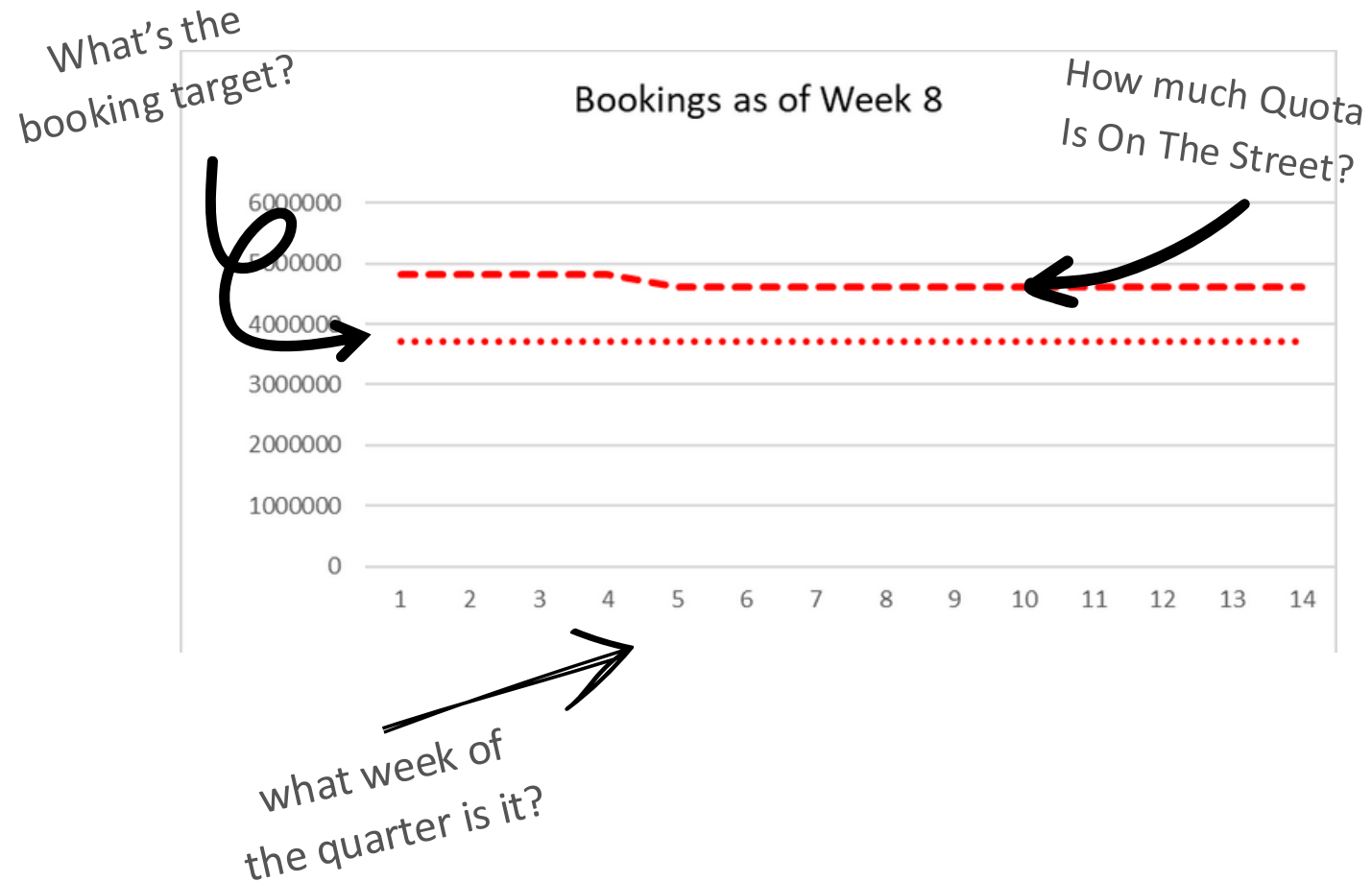


Step 1: Document your assumptions

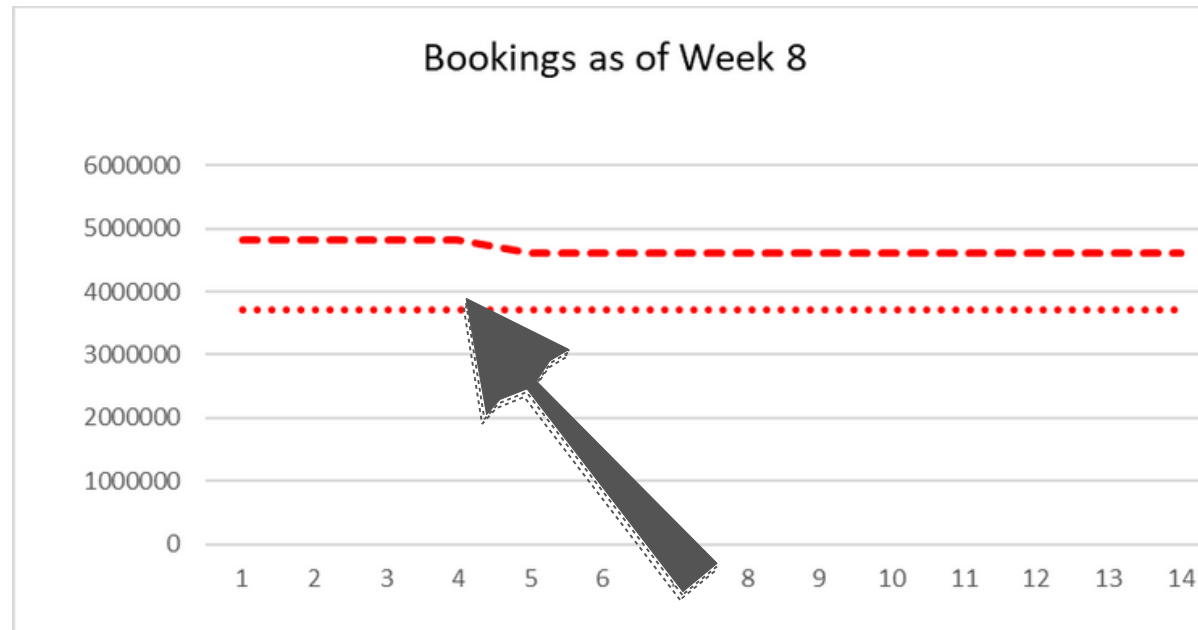
Step 2: Communicate the implications
and a correction plan

Step 3: Report on progress

The weekly flash report

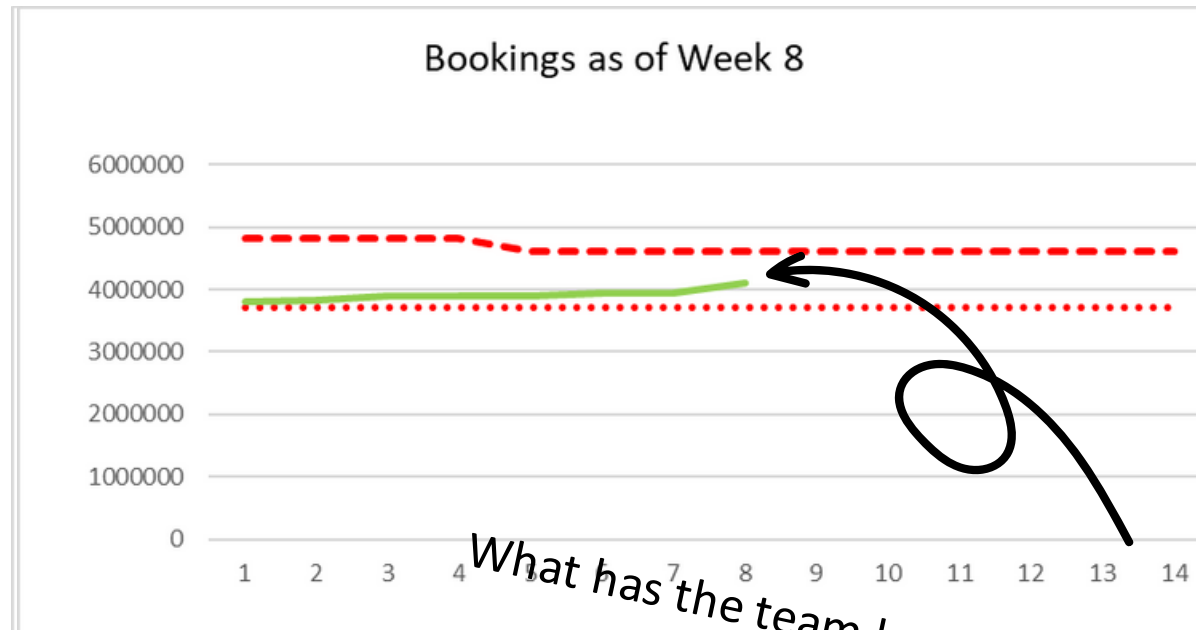


The weekly flash report



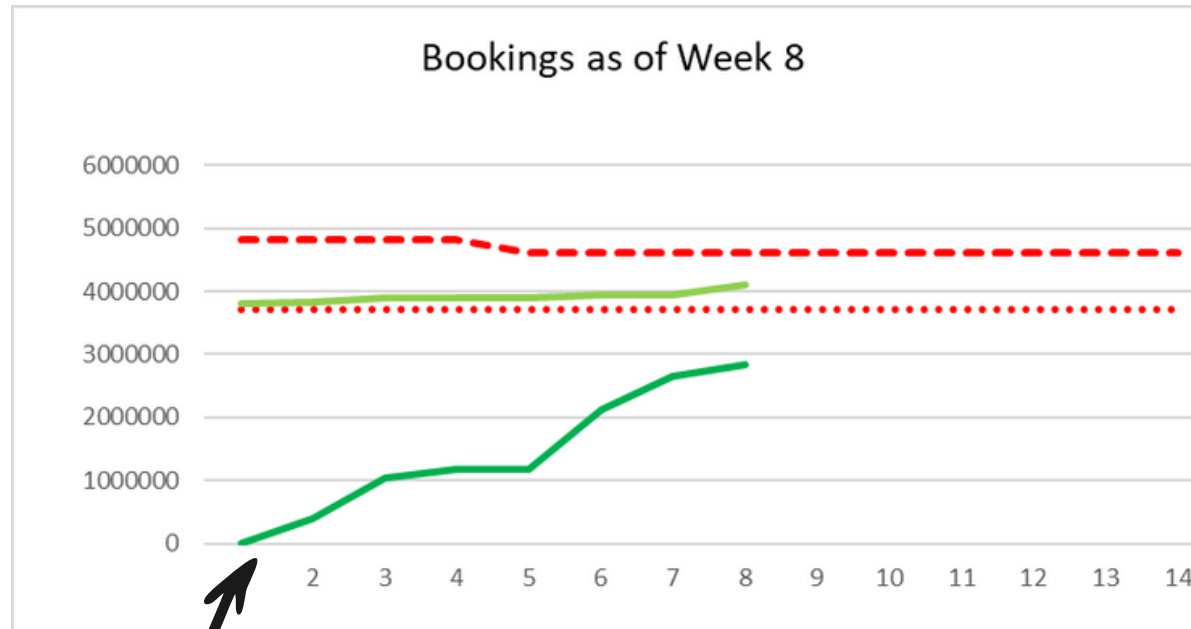
Someone left in week 4.
There's less quota on the street,
but still more than the bookings plan for the
quarter

The weekly flash report



What has the team been forecasting each week?
Good news! It's higher than the quarterly plan, and keeps going up!

The weekly flash report



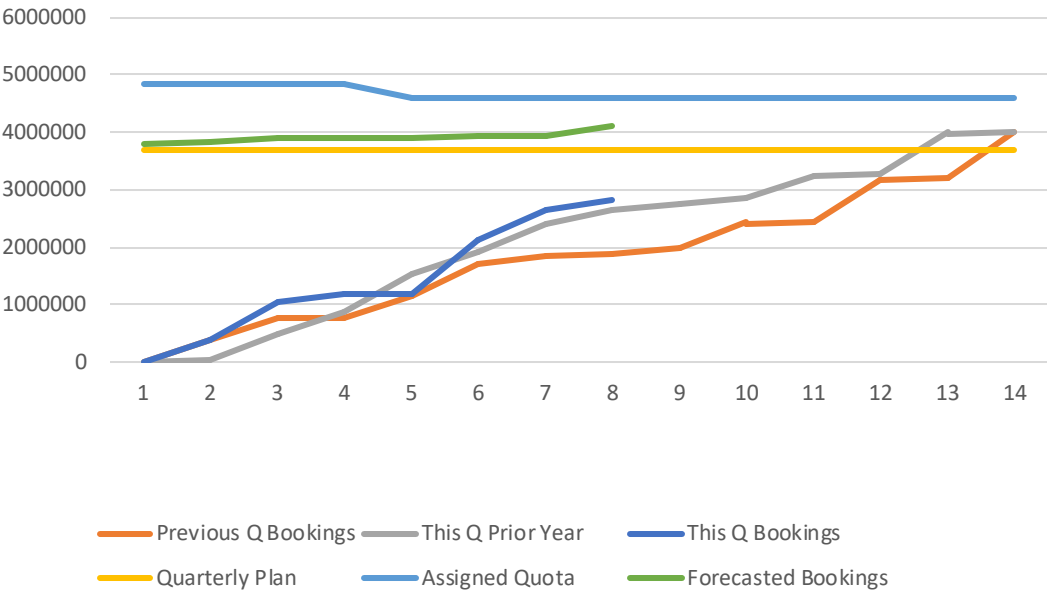
How much has been booked by the end of each week this quarter?

The weekly flash report

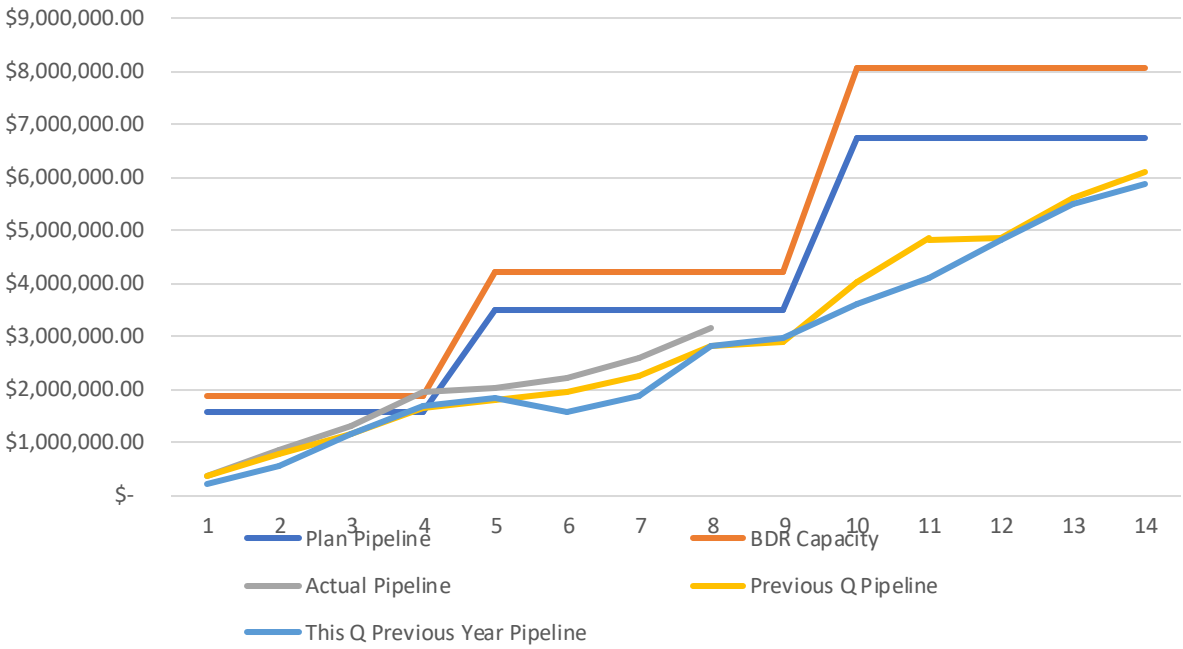
How does that trend compare to last quarter?
What about this quarter last year?



Weekly Bookings Progression



Weekly Pipeline Progression



	Quota		Forecast			Bookings	Gap to Plan					Pipeline Coverage To Forecast	
Sales Team	Quarterly Plan	Assigned Quota	Manager Commit	Manager Best Case	Manager Forecast	QTD Bookings	Bookings to Plan	Forecast to Plan	Commit To Plan	Best Case to Plan		Open Pipeline	Pipeline Ratio
Sr. New Logo	\$ 1,665,000	\$ 2,158,000	\$ 1,415,832	\$ 2,186,482	\$ 1,640,154	\$ 928,471	\$ (736,529)	\$ (24,846)	\$ (249,168)	\$ 521,482		\$ 2,063,880	2.9
Jr New Logo	\$ 925,000	\$ 1,110,000	\$ 974,183	\$ 1,310,481	\$ 1,025,096	\$ 775,210	\$ (149,790)	\$ 100,096	\$ 49,183	\$ 385,481		\$ 799,635	3.2
Install Base	\$ 1,110,000	\$ 1,332,000	\$ 1,225,719	\$ 1,618,920	\$ 1,435,134	\$ 1,125,800	\$ 15,800	\$ 325,134	\$ 115,719	\$ 508,920		\$ 1,082,670	3.5
All Team Sales	\$ 3,700,000	\$ 4,600,000	\$ 3,615,734	\$ 5,115,883	\$ 4,100,384	\$ 2,829,481	\$ (870,519)	\$ 400,384	\$ (84,266)	\$ 1,415,883		\$ 3,946,185	3.1
			98%	138%	111%	76%							

Commentary for Week 8 of Our Quarter

- With 2.8M already book, the team is 75% of the way to the annual plan.
- Even with the loss of one of our sellers at the end of last month, there is more than enough quota on the street to support p lan.
- 3.6M of deals are committed for the quarter (94% of goal). With a best possibility of 5.1M (135% of plan), the team is forecasting 4.1M of bookings (107% attainment).
- Key deals to achieve that forecast include:
 - LuminaCore (we need to agree on a reduced scope for quick implementation)
 - Veridien (indicates they can sign if we will approve 120 day payment terms)
 - Ethos (A new CFO has been hired and needs a review of his own before signing off on the team’s recommendation of us).
- At the end of last month, we achieved our pipeline goals, and look on track to achieve this month, too. However, that’s aggre gate pipeline generation – our Sr. New Logo team is struggling with not enough pipeline for new deals. That shortfall is currently offset by a solid pipeline of upsell deals to the Install Base.

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What are YOU thinking about
doing for the second half?