



SALES ENGAGEMENT

masters

POWERED BY  **Skaled**

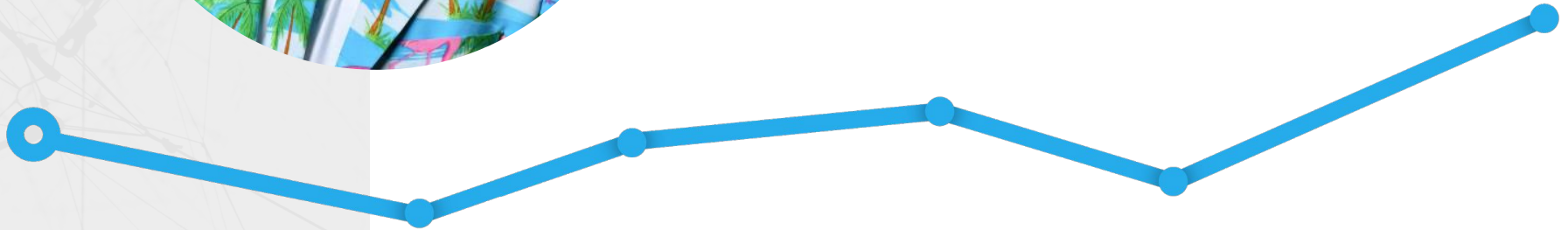
April 23, 2020, Session 5



WORKSHOP, 2:35 - 3:00 PM CT

Modern Sequence Building - 3 Practical Examples That Any Organization Can Implement to Double Results

JEREMY LEVEILLE GLOBAL ACCOUNT EXECUTIVE, LEADIQ




1st Play: Be Customer Obsessed

“We need less product training, and more buyer training”

-Mark Roberge

Customer Info Doc

1	Account	What they do?	ICP	HQ	Employee Count	Competitors	Sales TechStack	Story	Champion
2		app for business people to book travel	HR execs..all businesses but mostly SaaS	Palo Alto, CA	366	Lola, TravelPerk, Egencia, TravelBank			
3		Project Management Software		San Francisco, CA + Boston, MA	325	Asana, Clarizen, Workfront, Planview	SalesLoft	Had SalesLoft + ZoomInfo, started evaluating us for just EMEA team but ended up switching from ZoomInfo to LeadIQ across entire global SDR org of 30+ reps..their SDR Director Kaulana Shaum said he'd do case study	
4		Customer Success software	Customer Success leaders @ Tech companies	Redwood City, CA	612	ChurnZero, ClientSuccess, Totango, Natero	Outreach, Sales Navigator		Andrea Lyd
5		sales enablement software	sales enablement/sales leaders @ tech companies	Chicago, IL	387	Highspot, GetAccept, Seismic		Uses both LeadIQ + DiscoverOrg. Jeremy met one of their BDRs at #FlipMyFunnel event and the BDR said he likes using LeadIQ way better! They acquired LearnCore and now all the LearnCore reps are using us too	
6		Build APIs and integrations	VP/Chiefs of IT or Digital at enterprise orgs like Airbus and Unilever	San Francisco, CA	1,473	Informatica, TIBCO, SnapLogic, Jitterbit		Our biggest customer, with 120+ users. Has continued to use us even after getting acquired by Salesforce. Uses us in North America and EMEA	
7		product lifecycle management software	product lifecycle managers and lead systems engineers @ enterprise manufacturing orgs	Santa Clara	121	Arena, AutoDesk, PTC			
8		location app	GIS administrators @ govt municipalities, solar companies, engineering companies	Australia & Salt Lake City, Utah	224	Pictometry, EagleView, MapInfo, esri			
9		phone and internet services	IT/network manager @ companies of all types & sizes	Mumbai, IN	11,447	Vodafone, Singtel, AT&T, Verizon, Telstra, bharti			
10		data science & data analytics platform	business analysts & business intelligence managers @ tech, finance healthcare orgs	Irvine, CA	910	Tableau, Qlik, Datawatch			
11		Insurance/benefits	HR execs @ law firms, construction companies, tech companies, manufacturing, financial services, etc.	Kansas City, MO	6,073	Hays, Integro, Higginbotham			
12		Software developer talent acquisition	HR/Talent Acquisition execs @ high growth tech companies	New York, NY	1,619	Collabera, NES Global Talent, Global Technical Talent			
13		Software for product teams	VP, Director and Manager of Product Management @ Tech companies	San Francisco, CA	316	Segment, Pendo, Localytics, WalkMe, MixPanel, MovableInk			
14		Application security platform	application/network security teams, CISOs, etc @ enterprise orgs like Twitter & General Motors	San Francisco, CA	741	Synack, Bugcrowd, Alert Logic			
15		Software that gives analytics to help w/ UX	People in charge of UX at SaaS & ecommerce companies (co-founders, heads of design, directors of product, etc)	Atlanta, GA	142	Mixpanel, Segment, Localytics, Pendo			
16		Software that helps reduce risk & with fraud detection/prevention	Engineering & Product leaders @ ecommerce companies	San Francisco, CA	177	Signifyd, Accertify, Datarobot, Kount, Ravelin			
17		Log monitoring software	IT, specifically people in DevOps, system admins, developers, etc	Boston, MA	151	Sumo Logic, AlertLogic, CloudCheckr, Loggly, SolarWins, Logmatic			

Buyer Knowledge Doc (1)



Sales Ops - Revenue Operations/Pipeline Creation

Workfront

Nov 2018 – Present • 6 mos

In this role, I help plan, test, carry out, and report on key initiatives to increase the quality of top of funnel pipeline creation from an operations perspective.

--Job Responsibilities--

- Operationalize Business Development arm of Marketing department integrated campaigns
- Facilitate strong marketing and sales alignment through coordinated strategic planning, attribution analysis and systems methodologies
- Manage and create technology tutorial videos for rep softwares and best practices
- Help manage territory alignment/account methodology for AE's/DSR's globally
- Admin of Outreach.io - customer engagement platform
- Admin of Ambition - gamification/rep competitiveness software
- Admin of LinkedIn Sales Navigator - networking/social selling platform
- Admin of ZoomInfo - contact database/sourcing
- Strategic planning with management team/senior executives for organizational development
- Increase visibility across org for rep activities
- Analyze and improve upon choke points in process
- Facilitate systems changes required for overall business strategy
- Share sales knowledge and expertise to ensure strategy aligns with selling best practices
- Assist reps/managers in increasing effectiveness of pipeline creation process from account research, sourcing prospects, social selling, task completion, quality of meetings/pipeline creation, data visibility and reporting, and overall territory strategy
- Participate in important ad hoc projects for Sales Ops initiatives
- Collaborate with Enablement, Marketing Operations, and Sales in strategic initiatives

KEY PROJECTS

- Technology Operations
- Visibility/Process Optimization
- Salesforce CRM data projects/alignment
- Serve internal customers (Marketing Ops, Integrated Marketing, Sales, Biz Dev)

Buyer Knowledge Doc (2)



The Rainmaker Group

4 yrs

Director, Commercial Operations

Jun 2017 – Present · 1 yr 11 mos

Alpharetta, GA

- Served as Salesforce subject matter expert during the DOJ antitrust investigation into the \$300m sale of Rainmaker's multifamily business unit, which was ultimately approved and completed in December 2017
- Launched new Lightning Salesforce (SFDC) instance for 60+ users as sole admin, implementing Sales and Service Cloud features, completing a data migration of more than two dozen objects and tens of thousands of records, and integrating additional tools like Hubspot and LinkedIn Sales Navigator
- Implemented a complete SDR-to-sales SQL handoff process to streamline lead generation efforts, automatically notify sales of pending opportunities, and provide leadership key insights into the efficacy of our marketing and demand generation program
- Developed and owned regular weekly/monthly/quarterly reporting, including the sales forecast, pipeline management, activity, attainment, and QBR reports
- Managed two direct reports dedicated to making SFDC our system of record, streamlining processes, and breaking down silos across the organization, from sales and marketing to customer success and support

[See less](#)


Director, Sales Operations

May 2015 – Jun 2017 · 2 yrs 2 mos

Alpharetta, GA

- Built the sales operations department from scratch, working closely with the CCO, CFO, and sales leadership to define process, train 40+ users on Salesforce best practices, and create regular, standardized reporting
- Served as one of five key players on a 9-month project to completely overhaul the prospect to customer process within Salesforce, including the development of custom objects; introduction of price books, opportunity products, quotes, and approvals; UAT; user training; and final deployment to the production environment
- Established a weekly/monthly/quarterly reporting cadence, creating reports and dashboards to provide both the executive team and reps with an in-depth view of KPIs, including quarterly forecasts, pipeline coverage/velocity, closed won/lost deals, and quota attainment across our two verticals

Buyer Knowledge Doc (3)



Senior Manager, Sales Operations

Samanage · 117 Edinburgh South Suite
100, Cary, NC 27511, US

Posted 4 days ago · 283 views

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Job description

Samanage is the Service Success Company, enabling modern organizations worldwide to deliver a superior service experience to their employees. Through unprecedented agility and scalability, Samanage gives service providers the ability to rapidly and consistently deliver the services that employees need to get work done.

Samanage is growing quickly and looking for a Senior Manager, Sales Operations professional to help drive measurable improvements in sales productivity and lead generation activities. The sales Operations manager will bring an analytical problem-solving approach, relentless drive and a sharp focus on taking steps that impact our business.

Here is what you will do:

- Identify and eliminate sales process bottlenecks and inconsistencies
- Support sales development team, including training, coaching, process development & system support
- Support/own key sales business processes (sales forecasting, planning, commissions' execution, etc.)
- Work with sales management and other stakeholders to identify the sales target opportunity and assign quotas & territories
- Analyze sales pipeline data to monitor pipeline coverage, and to highlight

Connect on LinkedIn with Customers - screen shots



Jeremy Leveille • 6:52 PM

Andrea, thanks for being a LeadIQ customer..you rock!



Andrea Lydon • 7:23 PM



Were you the one that reached out to Evan Warner over at SurveyMonkey?!

if so, he said it was a solid email and I'm chatting with him later today about how much we <3 LeadIQ :)

Name drop me and Gainsight whenever you need!

Connect on LinkedIn with Customers - referrals



Jeremy Leveille • 9:44 PM

Thanks for being a LeadIQ customer!
Anyone in your network who you'd
suggest I reach out to who might also
love us?



[Redacted Name] • 3:32 PM

I recommended LeadIQ to this guy at a
conference this week.

[https://www.linkedin.com/in/\[Redacted Name\]](https://www.linkedin.com/in/[Redacted Name])



Connect on LinkedIn with Customers - job changes



David G. • 4:51 PM

Hey Jeremy, hope you're doing well on this lockdown. I hope you can help... I'm speaking with a startup that needs to start really small and ramp up as we grow. What is your best plan for a broke ass start up? Ideally I'd get one seat with like 1500 contacts per month. Is something like that doable and at what cost?

Connect on LinkedIn with Customers - competitor intel



Jeremy Leveille • 9:46 AM

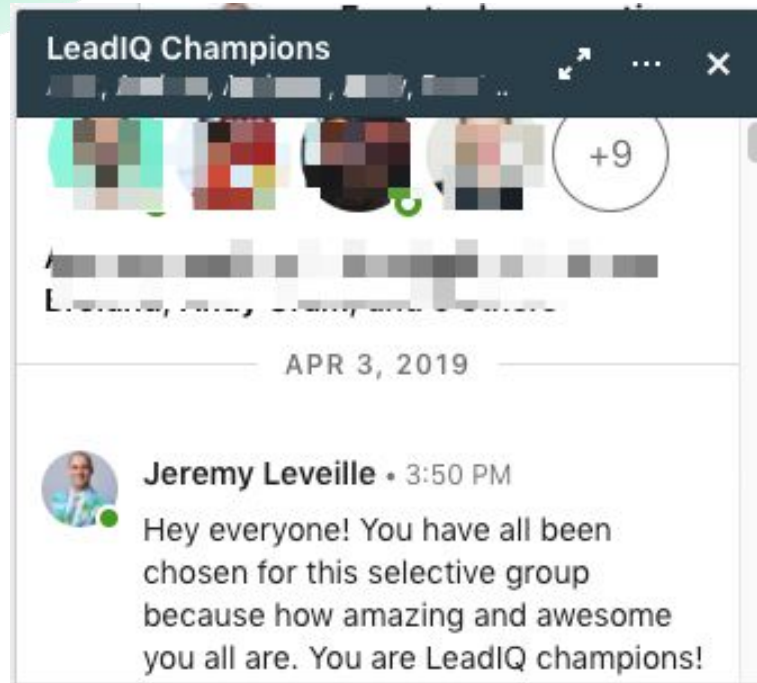
What's the main reason you prefer LeadIQ over Lusha?




Mike Brown • 10:33 AM

still manual to upload to salesforce, doesnt intergrate with salesloft, accuracy of contacts, availability of email addresses, availability and accuracy of phone numbers... and of course, the sales guy.

Connect on LinkedIn with Customers - champions




Connect With Customers - and Advocate for Them!

**Scott Britton** • 1st
Co-Founder, Troops.ai
6mo • 🌐


Sales development friends - Troops is hiring a Sales Development Manager!

Let me know if you know anyone great who is excited about managin ...see more

**Jeremy Leveille** • You
Removing the Pain From Prospecting! 📞 😊 🔥 💰 🚀 6mo (edited) ...

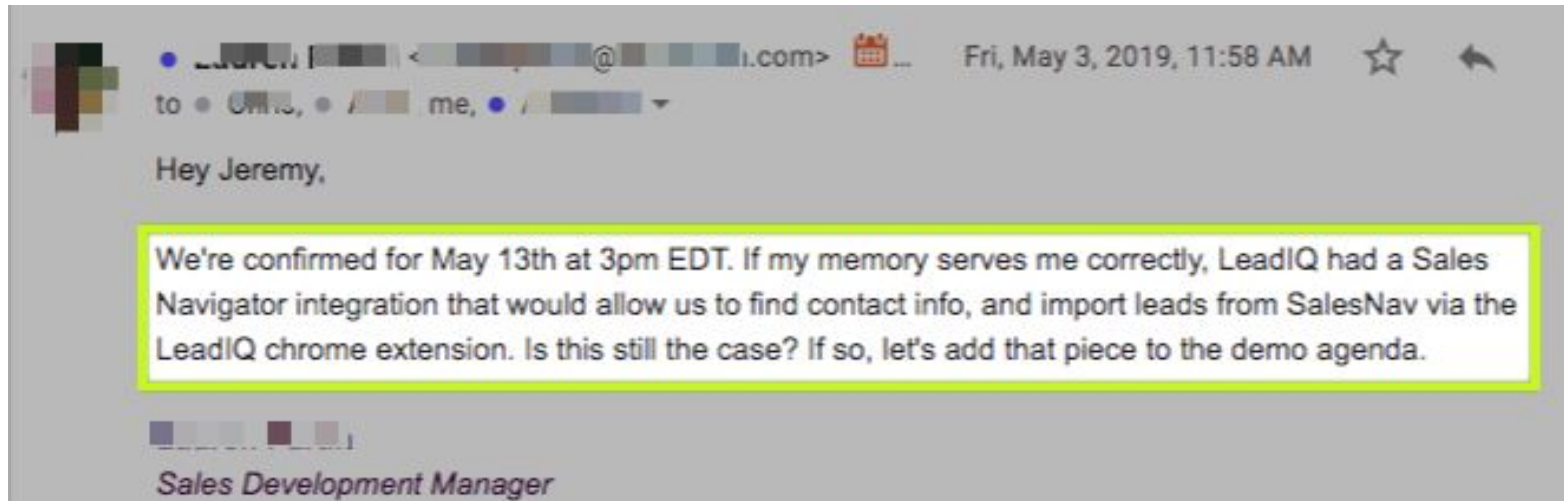
Sounds like a great opportunity! Wonder if my NYC friends know anyone who may be interested? [Nicole Taylor Cole Fox Calvin Patterson IV Sabba Nazhand David Mordzynski Kevin Rooney Mark Birch Malcolm J. Smith](#)

👍 • 3 Likes | 💬 • 1 Reply

**Scott Britton** Author
Co-Founder, Troops.ai
Thanks [Jeremy Leveille!!](#) 6mo ...

👍 • 1 Like | 💬

Speak Your Prospect's Language



How to REALLY Add Value - free consulting



Stuart Taylor • 1st

Head of Sales Development at Refract

5mo •



Big thanks to [Jeremy Leveille](#) and the LeadIQ team not only do they have an awesome product but they genuinely care about helping their customers.

Jeremy spent an hour with the Refract team today sharing his own prospecting tips that helped him become one of the very best SDR's in the business.

He's now an awesome AE who's been a pleasure to deal with from start to finish.



31 • 6 Comments

How to REALLY Add Value - refer business to your prospect



Jeremy Leveille <jeremy@leadiq.com> 📅

Tue, Aug 6, 2019, 5:

to ● Peter ▾

Hi Peter,

Here's [redacted] :

[https://www.linkedin.com/in/\[redacted\], \[redacted\] \[redacted\] \[redacted\]](https://www.linkedin.com/in/[redacted], [redacted] [redacted])

C. 612-522-4166

E. [redacted]@ [redacted].com

He mentioned that they have a new line of business / new market they are trying to sell into and they're looking for leads.

He needs an appointment setting service..I suggested that he check you guys out.

They're an insurance company.

Good luck!

Jeremy

2nd Play: Turn Outreach from Cold to Warm

“Why start on your own 1 yard line if you’re already at midfield?”

-Jeremy Leveille

- Previous opps / calls / email replies
- Free trial sign ups
 - Top - down
 - Bottom - up
- LinkedIn Connections

3rd Play: Be Fanatical About Your Sales Conversations

- 90% of the messaging I use today comes from the conversations I've had over the past year
 - Sliding scale (6 months, 3 months, 1 month)
- Be Present in conversations
- Listen
- Take Detailed Notes
 - Put notes in SFDC
 - Share Notes (and the recording) with Your Prospect after EVERY call
- Keep your value prop(s) fresh - iterate
 - Same with competitor battlecards



Connect with our speakers on LinkedIn

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Aly Ray Thompson, MC:

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