2024

SALES ALMANAC

Top trends from 100 sales and CS voices on LinkedIn.

Flowla

Foreword

2024 Sales Almanac in numbers:

- 100,000+ reactions & 10,000+ comments
- 1,000+ LinkedIn posts reviewed
- 100+ LinkedIn sales voices
- 10+ trends that ruled 2023
- 1 resource to prepare for what's next.

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Co-Founder & CEO

Flowla

In 2024, adaptability wasn't just a buzzword in sales and CS — it was the game-changer. Facing challenges head-on, 79% of leaders found a way not just to survive but to thrive, reporting revenue growth.

What was their secret? A focus on nurturing relationships with current customers while uncovering new ways to sustain revenue streams.

Meanwhile, the industry saw AI mania sweep across teams. As FOMO turned into action, RevOps emerged as a key player, driving strategies built on efficiency and scalability.

In a world where software has become commoditized, products are no longer the stars of the show — it's the buying experience that steals the spotlight.

To make sense of these shifts, we've brought together the top voices and distilled the noise into one clear narrative: Sales Almanac 2024.

From all of us at Flowla, happy holidays! We hope you enjoy this read as much as we enjoyed crafting it. And make sure to join the conversation on LinkedIn #SalesAlmanac.

Index

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2024 Sales & CS Trends: Key Takeaways

As we're nearing the end of 2024, it's time we look back at what's been happening in the sales/CS space and prep for what's ahead. To identify the most prominent trends in the industry, we've analyzed the recent research findings and paired them with our observations. Here's what 2024 looked like in revenue.

1. Revenue growth despite the challenges

79% of sales leaders say revenue increased over the past year. However, challenges persist, as 3 in 4 business buyers try to extract maximum value from every purchase. Sales cycles are getting longer which often leads to prospects backing out of deals. Moreover, reps only spend 30% of their time selling during an average week, struggling to hit quota.

2. Finding new revenue drivers

Most businesses see greater revenue by selling to existing customers than to new ones: Upsells drive 21% of revenue on average. Since it's typically handled by the CS team (as reported by 49.1% of respondents), the role is no longer considered cost centers, but increasingly measured on upsell revenue, expansion MRR/ARR, and cross-sell revenue, although 63.6% of CSMs still don't get any commission.

3. The growing role of operations

RevOps function is present in some form in 67.5% of B2B companies, typically supporting the entire Go-To-Market team. Yet, 55.3% of CS teams have a dedicated CS Ops function. The growing reliance on tech makes the role of sales ops more important. And so is the role of enablement as 3 in 4 reps say their company's programs prepare them to meet quota.

4. The quest for efficiency continues

To better understand customer needs and relieve their reps from manual tasks, 4 in 5 sales teams have been experimenting with or have fully implemented AI. And it works: 83% of sales teams with AI saw revenue growth in the past year while also saving 2 hours per day on average. More sales teams are also offering self-service tools and content to buyers to help guide their purchase decisions and communicate value more clearly.

State of Sales - Salesforce (Sixth edition) I HubSpot's 2024 State of Sales Report I State of Customer Success Report 2024 I The 2024 State of RevOps Survey - Openprise

The Evolution of Outbound

Michael Hanson
Empowering B2B Sales Teams to Have Better Conversations | CEO - Gro...
Visit my website

From 2019 to 2022, the number of SDRs grew 2.5x.

In the last 18 months, it's down 12%.

The market has undoubtedly shifted.

But I don't see the SDR role totally dying.

My prediction is we'll see more experienced people doing the "SDR role".

I've already seen this shift in our training.

Back in 2021, 80% of outbound training we did was with SDRs.

Now 80% of it is with full cycle salespeople.

Buyers don't want to be spammed by inexperienced sellers.

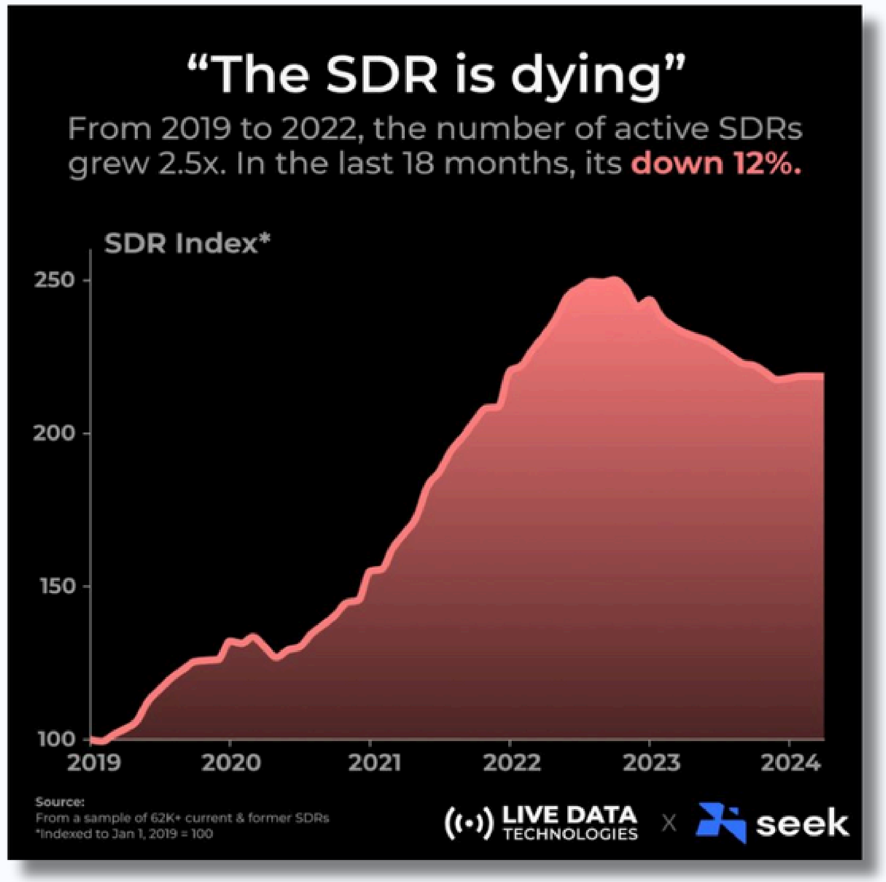
They want to have conversations with industry experts who understand their problems.

21 year old SDRs can still become experts but they need to shadow top salespeople, interview customers and read industry news.

The days of hiring 50 kids straight out of college with 0 training is over.

106 69 2 See full post

Just like in 2023, the future of SDRs remains a hot topic, with many questioning if automation and AI will lead to the role's decline.



Despite all the talk, the SDR role isn't going anywhere — it's evolving to become more efficient, requiring skilled effort applied across the whole sales cycle.

Cynthia Handal

[Companies want] reps that are able to:

1. Hunt the prospect and book the meeting📅
2. Do the demonstration🎮🎥
3. Continue the followup✉️📞
4. Close the deal💰💰

Cynthia Handal
Sales & Demand Gen Leader @ Simera | Building High-Performing Teams
8mo •

AE Roles will be eliminated! ✝️

SDR roles will be eliminated by AI! 🤖

True or False?👍👎

Well, sorta true….

The future more and more is eliminating both roles, because companies want full cycle sales reps!⭕⭕

Companies no longer want AEs that just sit around and wait for meetings and then take the credit for closing while only working 3 hour days! 😱😱😱😱 they have no idea what it is to hunt for leads… have no capacity to do lead gen on their own…

AI is being used to get more information on prospects and help with personalized outreach.. 🤖😱🤖🤣⏭️

⏭️⏭️⏭️⏭️⏭️⏭️⏭️⏭️⏭️⏭️ the future…

Companies want cradle 👶 to grave reps💀🪦 known as full cycle reps. I see this everyday more and more… the role is evolving..

Welcome to the The New Sales Era🚀 this is what the not so far away future will look like!

133 64 1 See full post

Even AI SDRs don’t seem to threaten the role.

Scott Martinis

Founder | B2B GTM | Scale without headcount by mapping your playboo...

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I have been informed that VCs think AI SDRs will replace the BDR model within 3 years so I am breaking my break from social media to address this

First - if your idea of a BDR is an email only role that cleans up a bad ZoomInfo or Apollo.io search, lightly personalizes the first email, and occasionally calls email opens... yeah, that will get replaced

But AI SDR is not the real category - it's really just an automated lead gen agency with a front end UI and 80% 6 month churn

So what's really going on?
99% of the market never actually understood top of funnel
The market took an overly simplistic view of Predictable Revenue™ Inc., threw billions of dollars of it, and threw up their hands in confusion when skipping 70% of key ingredients to success got 30% of the results.
Now we're trying signal based selling, AI SDRs, influencer marketing, website visitor identification

Because we're in tech and we think tech is a silver bullet
Instead of doing the obvious and hard thing
You have to do the work, and we WILL see AI that helps orgs do the important work
But we aren't close to solving the REAL problems in GTM tech yet

839 | 256 | 25 | See full post

In fact, many still are quite skeptical about this trend.

Kyle Coleman

CMO @ Copy.ai || Helping companies eliminate GTM Bloat 🐡

Visit my website

The receipts are starting to come in from AI SDRs. They are not pretty.
I talked to 4 CROs / VP Sales this week and they all said a different version of the same thing.
They saw a little blip of success the first week or two after a deployment.
And absolute crickets after.
🔥 They picked the low hanging fruit, and burned down the orchard.
Turns out, effective prospecting is nuanced, complex, and strategic.
Elements of it lend themselves very well to AI (research, brainstorming, synthesizing info, etc).
Many other elements do not.
Every customer touchpoint matters. It should be as thoughtful as possible.
Especially as the buyer's bar continues to rise.
Be very careful about outsourcing strategy to AI. There is no easy button, there is no silver bullet. Proceed accordingly.

1,169 | 195 | 25 | See full post

Some of the most effective tactics are still the ones that don't scale.

Richard Smith
Fixing big sales problems through expert 1:1 coaching
Book an appointment

Lots of negativity on here at the moment about the future of the SDR role.
I think a lot of it ignores this key side of the argument:

The old way of the SDR is perhaps dying off.

But hardly any companies are embracing the new way.

Old way:

- Load in 100 contacts into your sales engagement platform
- Smile and dial and have a couple of conversations a day.
- Automatically send 250 emails a day where the only responses are 'unsubscribe'
- 'Multi-channel' every prospect on the specific cadence that SalesLoft or Outreach tells you to.
- Qualify 'demo requests' before an AE speaks with them (your very highest intent leads)
- Call every single prospect who ever downloads a white paper
- 'Coach' by looking at the activity dashboards and telling your SDRs to 'do more'. Listen to one call recording every month at best.
- Book a couple meetings per week

New way:

- Identify the very best fit 20-30 contacts to work and apply a strategy to best engage with each (research, messaging, personas)
- Have numerous conversations per day
- Stop sending automated templated emails and instead, invest more time crafting highly personalised emails which warrant attention and responses.
- Double down on the channel that you get most success from based on historic data. Over invest time in that channel. When you can't reach a prospect with that channel, then switch tact.
- Don't wait for 'Step 7' to come round before you call the prospect again. Call them that afternoon or the next morning as triggers and signals indicate it's the right thing to do.
- Send highest intent leads (e.g demo requests) straight to an AE. Keep SDRs focused on the best fit prospects who aren't reaching out to you.
- Prioritise SDRs focus on 'dark social' leads versus white paper downloads (secondary). Have them mine webinars, communities, social media to find conversations where prospects are suffering from the problem you solve.
- Coach by diving into calls, emails, videos, prioritisation, mindset, productivity, career paths. Drive execution excellence by sharpening skills which result in more meetings and happier/more motivated SDRs.

The old way of the SDR may be dead.

But the new way of the SDR for those applying it, is thriving.

259 62 2 See full post

Felix Frank ⚙️
Founder @StackOptimise | Certified Clay and Smartlead expert | Building...
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How to Do Outbound in 2024 ⬇️

⚙️ 1x GTM Engineer whose role is the following:
▶ Manage the entirety of the cold email channel using Smartlead or Instantly.ai
▶ Manage the entire sales team and leadership's LinkedIn profiles for outreach using HeyReach or La Growth Machine
▶ Build automations to monitor and scrape for all the relevant sales signals
▶ Qualify lead lists at scale and craft AI-personalized messaging using Clay
▶ Provide lead lists with mobile numbers and personalised talk tracks for SDRs to cold call
▶ Generate 100+ leads per month

📞 1x SDR (with room to scale) whose role is the following:
▶ Cold call all the warm replies to the email/LinkedIn campaigns
▶ Cold call the warmest leads (those sourced from the best triggers) that don't reply using a parallel dialer like Salesfinity
▶ Leverage team member networks for introductions (assisted with Hifive 🙌 or Commsor 🦕)
▶ Strategic outreach that can't be automated, including cross-selling, helping AEs multi-thread, and nurturing warm leads
▶ Attend in-person events
▶ Generate 50+ meetings per month

163 58 1 See full post

As a result, many organizations are forced to rethink their priorities and embrace the new way of things.

Felix Frank

This is how outbound teams should be thinking now. High quality, high volume. Minimal headcount.

Being proactive, rather than waiting for signals, with a proper product-market fit is still key to building a solid pipeline.

Tito 🚀 Bohrt
SDR/BDR Advocate | 6x SDR Leader Award Winner | Data-Driven GTM
Visit my website

Everyone talking about signal based selling. Obsessed over it perhaps. You're going to lose.
Only 3% of people are in market. Now as a buyer once you 'give' enough signals, 30 vendors reach out to you to capture your interest…
But guess what, the way you win in B2B is not by capturing the 3% that's about to buy and fight a feature by feature and pricing battle against your competitors…
The way you win is by reaching out to prospects early and shaping how they think about their problem, and how to solve it.
You win by helping prospects set their solution criteria and rigging the game in your favor.
Sadly, signal-based is not scalable.
Try to double your SDR team, you do not get 2x the revenue, because you can't double the accounts that have those signals.
You're capturing demand, not creating it.
To create demand, and create revenue, you have to start earlier in the buyers journey. Learn to shape how the market thinks, and be patient… that's the way to build predictable revenue.
Stop the shortcuts, blocking and tackling is the way you win games.

272 137 4 See full post

Jacob Karp
Brand partnership • Enterprise Sales at Rubrik I Data Protection + Hones...
Visit my website

The longer I'm in sales, the more I realize that product market fit is the thing I care most about when selling a technology.

It's one of the few things even the greatest sellers can't overcome if they don't have it.

It makes selling in good times great and selling in bad times survivable.

It translates to demand for your product, which means more conversations and more opportunity, even in a down macro environment.

It's a leading indicator for pipeline generation, revenue closure and ultimately quota attainment.

If you're selling something that the market needs and wants, quota attainment feels a lot more possible regardless of circumstances.

So if you are thinking about a new role, start by seeking out strong product market fit.

It's what brought me to my current company and role and I see its impact weekly, monthly and quarterly.

460 42 3 See full post

Chris Ritson
Founder @chrisritson.xyz & thesdrleader.com | Online Courses, Bootcam...
Visit my website

SDR Teams in 2020:
- Lowest paid, "entry" level staff
- Don't know the market fit very well
- Not deeply familiar with the product
- Have never come across AI or used it
- Brute force focused via mass activities
- Don't truly understand customer accounts
- Don't have any copywriting or content skills

SDR Teams in 2030:
- Experienced, well paid sales staff
- Able to articulate market fit deeply
- Signal & Intent Based Outreach only
- Know the product better than anyone
- Leading Content Creator in their space
- Leverage AI in their everyday workflows
- Trusted by prospects as a 'go to' resource
- They 'get' customer problems better than customers

SDRs are not going away.
SDRs doing boring, low value, repetitive tasks will though.
My advice for SDRs - choose a market and become an expert there.
SDRs aren't going anywhere.

544 44 25 See full post

So, whatever you prefer to call the "new outbound", it does have a future and it looks promising.

Harry Sims
THG Ingenuity | Ask me about Lift-Ups
Visit my website

Sorry to tell you but

Inbound-led outbound
Signal-led outbound
Allbound
AMB
ABX
Outbound 2.0

Is all just good outbound.

It didn't need a new name.

133 39 1 See full post

Adjusting your strategies and processes, starting with how you build the top of your funnel, is a must to make sure you hit quota in the years to come.

David Bentham

Yes, outbound is getting harder. But it's getting especially hard for SDRs when their sales leaders continue to run the same old tactics
Unless leaders adapt their existing processes in line with how prospects buy today, don't be surprised if only 30-35% of SDRs hit quota in 2025.

David Bentham
VP, GTM @ DinMo
8mo • Edited •

There are over 832,000 Sales Development Reps on LinkedIn. Yet only 55% of SDRs are reported to be hitting quota. Here are my 4 observations on why this is happening:
1 - Managers believe that more calls = pipeline issues solved at the Top of the Funnel.
10 years this might have worked. But today, a VP Sales asks a top SDR to up her call volume but in return, her outcome metrics drop. Those extra dials cost her valuable time crafting well-researched and super-relevant outreach that had made her so successful previously.
2 - Prospecting to bad fit accounts outside your ICP
An SDRs outreach is only as good as the list they prospect to. So giving an SDR a random prospect list or the freedom to pick their preferred accounts is setting them up to fail IMO. SDR leaders should be taking it upon themselves to analyse current customer data to find replica accounts based on what a great-fit customer looks like.
3 - Too much emphasis on product training vs persona training
Too many SDRs 'feature dump' instead of focusing on value-based outcomes. Your buyer doesn't care about your new fancy product feature - they can visit your website to get that info. They want to know you understand their needs and can offer a solution to solve the problem they're facing.
4 - Interrogating prospects with qualification methods.
I'm still shocked that managers expect their SDRs to understand every part of MEDDICC or BANT before passing a prospect to an AE. It's unnatural for an SDR to ask questions on budget, decision-making authority, etc. It comes across as irrelevant and impersonal - especially if it's an outbound sourced opportunity.

685 100 19 See full post

Practical bits ⚙️

Ian Koniak
I help tech sales AEs perform to their full potential in sales and life with c...
View my services

I don't believe in cold calling. It doesn't work and is a massive waste of time and energy.
Instead, I believe in warm calling.
This approach has led to a prospecting to meeting conversion of 10-20% over the course of my sales career, as opposed to 1-3% when cold calling.
Here's how it works.

983 | 195 | 32 | See full post

Matthew Putnam
Founder @ Sales Upskill | Head of Growth @ Prospeo.io | Go-To-Market ...
Visit my website

Account based prospecting is a really tough skill.
But getting it right can decrease a sales cycle by 45%. Here is how you do it:
[Strategic Account Prospecting Guide 🎯]

229 | 642 | 5 | See full post

Tom Alaimo
CEO @ TA Sales | More Pipeline For Your Teams | Community To Get 1% ...
5mo • Edited •

I have a secret pipeline building sequence that has booked me hundreds of meetings the past few years.
It has led to some insane pipeline numbers. And it takes me less than an hour per month to operate. I call it my Stovetop Sequence

141 | 28 | 1 | See full post

Michel Lieben 🧠
Founder / CEO @ ColdIQ | Scale Outbound with AI & Tech 👉 coldiq.com
View my services

Here's how we generated 152 leads by implementing what we call 'waterfall personalization'.

447 | 414 | 9 | See full post

Mike Gallardo • Following
Sales Director at Deel
Visit my website

When you get a cold call objection say "that's why I called" 😎
6 Examples

6,432 | 546 | 264 | See full post

2

Engaging Today’s Buyers

Chris Orlob
CEO at pclub.io - Skill Transformation for Revenue Teams. Trained 11,00...
6mo •

Last week I met with the CRO of a company that was last valued at $2.3 billion. He used my favorite words I've heard TO DATE to describe the biggest problem in sales today: "A couple years ago we were selling in a 'demand-positive' environment. Today, we're selling in a 'demand-neutral' and even 'demand-negative environment.' Those are COMPLETELY different skills."

I asked him what skills sellers need today. Here's a few things he said:
1. Deliver a McKinsey-caliber POV.
The best sellers deliver POVs that rival a McKinsey consultant. They subtly communicate: "I know your business. And I know this problem better than anyone." Buyers walk out of those meetings better than how they walked in.

2. Uncover C-LEVEL pain and outcomes
Open your CRM. Look at the notes in the 'pain' field in your deals. Are these the topics that C-Level execs talk about? Chances are: Your pain statements resonate with mid level managers. Not C-Level buyers. Uncover the need BEHIND the need.

3. Uncover WHAT IT WOULD TAKE to capitalize on a priority.
best salespeople don't just uncover deep pain. They uncover how the buyer thinks about the causes. They offer insight on how the buyer SHOULD think about them.

4. Build consesus.
The best salespeople don't just multi-thread. They do it in a way that creates consensus.

4. Confront and convert skeptics into champions.
The best sellers know that skeptics can become your best champions. Only people who CARE about solving a problem are skeptical about solutions. If you can win them over, they move mountains. Lean into the skeptics. Not away from them.

1,487 130 40 See full post

The biggest challenge in sales today is the shift from a "demand-positive" environment to one that is "demand-neutral" or even "demand-negative."

This evolution requires a new skill set to engage **effectively** with prospects.

Claudio Meidler
Senior Sales Leader@Google | AdTech Sales lead Digital Marketing & E-...
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Sales is the spearhead of any business. Yet there is often some misconception about what sales exactly is.. It's much more than just persuading customers.

Sales is:
Emotional Intelligence
↳ Top salespeople can read and understand their clients' emotions, building rapport and adjusting their approach accordingly.

Active Listening
↳ Successful sales reps don't just talk, they truly listen to understand their clients' needs and concerns, ensuring this way to offer solutions that genuinely address those needs.

Curiosity
↳ Great salespeople are naturally curious, asking insightful questions to uncover underlying needs and motivations.

Charisma
↳ While not essential, charisma can help salespeople to stand out, build relationships, engage the customer and make a positive impression.

Analytical Skills
↳ In order to make informed decisions, salespeople need to analyze data, identify trends and understand market dynamics.

Psychology
↳ An understanding of human psychology helps salespeople to communicate effectively, influence decision-making and navigate objections.

Ability to Guide
↳ Effective salespeople guide clients through the buying process, offering expert advice and addressing concerns as a trusted advisor.

Closing Skills
↳ Ultimately, salespeople need to be able to overcome objections, securing commitment and finalizing the sale by closing the deal.

3,964 134 563 See full post

Sales professionals must aim to educate buyers, provide value, illuminate pain points, and present tailored solutions.

Troy Munson
CEO @ Dimmo - Go to dimmo.ai to evaluate software without sales cycles.
Visit my website

I booked a C-level meeting with a company that does over $10B annually.
The first email got a response: “Sorry, we’re not interested right now.”

What do you mean?! Based on the research I’ve done, it seemed impossible that it was NOT a good time.

Back to the drawing board I went. Deep into Google, pages deep, thinking "there's gotta be something".
There it was.
A 22 page research paper written by the Executive.
I read the entire report. 4 parts of it was relevant to what my company solves for.
I sent a video that was 1 minute and 12 seconds going over those 4 things.

Got a response the next day: “You mentioned X in the video and I didn’t know you played in that space. Let’s set up a time next week”.

Moral of the story: your prospects don’t know what they don’t know.

(This entire process took 4 months to get the first meeting).

Your job as an AE:
- Educate
- Provide value
- Illuminate pain
- Do your research
- Know their business
- Present a solution

1,224 114 20 See full post

Brian LaManna
AE @ Gong | Closed Won 🦙 | 5x President's Club
Visit my website

I've been trained on MEDDICC, Sandler, BANT, Spin, and others.
5+ years of 'mastery' later - my top takeaway is you should NOT get all of the "criteria" on the 1st call.
Unless you want a poor prospect experience, with them left disinterested.
My #1 goal on first calls is to show up with a point of view and in-depth research, have a mutual conversation, and learn if they have real business-level pain where we can help.
If I don't uncover the "Economic Buyer" or their "Decision Process," that is okay.
While discovery might be one of your CRM stages, it's not a one and done. It's a never-ending process to uncover challenges and how you can best support them. Meaning you can build on it, call after call. BUT you can only have call after call if your buyer is getting value along the way.

1,808 119 23 See full post

As a result, many buyers experience frustration with **redundancy** in their interactions with sellers.

Mark Kosoglow

We've made it so hard, put up so many barriers, and have made sales cycles so much about "us" that I wonder how many deals we are losing running the process that's supposed to help us win.

Mark Kosoglow
You've reached the Operator. Let us connect you.
Visit my website

I tried to buy software on Monday. The AE wouldn't let me. Here's how the convo went (mind-blowing how hard we make it to buy).

Me: I am an easy sell. I know my problem deeply. I understand the vendors. I have money. I can make the decision. This is an easy sale if you can help me understand a couple things I couldn't figure out on my own.
AE: Great. We'll see how it does once I put paper in front of you. But I do need to ask some questions to make sure it's a good fit.
Me: Not being rude, but I don't need discovery done on me. I understand my problem. I have a couple questions to ask.
AE: No worries. What are you going to use our product for?
Me: We are going to XYZ. Do y'all do ABC?
AE: Before I answer that, why are you looking at us?
Me: You are one of the solutions that had enough requirements for me to contact. I really need to understand if you do ABC. Do you?
AE: Depends. Who else needs to be in this decision?
Me: Question - are these questions in your CRM and you have to fill them out?
AE: Uh. Ya, but these are things we need to know for our process.

So what happened? I gave in. I gave him a bunch of short, useless answers for his CRM and manager. He could have SOLD me if he'd let me ask questions for 5 mins. In the end, I was told I needed to go through a technical round to speak to people about how I would use their product.
Note: The solution I'm after is obvious, not complicated, and commoditized.

I may be a unique buyer, but when I'm waving money in front of you, please grab it and ask questions later.

1,802 | 515 | 31 | See full post

Jason Bay
Turn strangers into customers | Outbound & Sales Coach, Trainer, and S...
Visit my website

"Our prospects get hammered with a qualification call from an SDR. Then they complain about getting asked the same questions again by the AE."

I'm still hearing this from sales leaders. In 2024!

Here's my issue with SDRs running a separate qualification call:

It's a TERRIBLE customer experience.

Here's what you're doing to the buyer:

1) I take a cold call and agree to meet
2) I take a 15-20 min. call and get hammered with qualifying questions
3) I take a 30-45 min. call with an AE and don't see the product
4) I take a second call where I actually get to see the product

And you're wondering why execs won't take meetings with your reps?

This nonsense has got to stop.

There's something fundamentally wrong in your outbound approach if the only meetings your AEs will take from SDRs are the ones that have been BANT-qualified first.

So what am I suggesting? Unless your sales team is so busy that you're turning down business, your AEs should take calls with ANY prospect who meets your ICP requirements.

278 63 11 See full post

To meet these changing dynamics, sales tactics need refinement offering a more cohesive approach that minimizes friction.

Jason Bay

It doesn't matter if they're ready to pull the trigger right now or not. Who knows, you may not even be talking to the right person.
Start the relationship and SELL.
Nurture if the timing isn't right.

This often means creating champions and focusing on right-fit deals.

Joey Alvandi
Community & Growth @ Tourial
Visit my website

I'm currently in the process of evaluating vendors for a service we are considering pulling the trigger on.

The old me
- google search possible vendors
- look at a bunch of websites
- try to narrow things down based on info I see
- try and schedule time with a couple vendors

Current me ✅
- ping an LA based GTM community I'm a part of in the what's app group
- ping people I know through linkedin who I've chatted with and trust.
- lay out our needs at a high level and ask for recommendations/ referrals to vendors who could potentially help.

Within 24 hours of pinging my community I've received 6 solid recommendations and held 2 calls with 2 potential vendors.

Point of this post: People are changing the way they buy.

Invest in creating customer champions who will throw your company's name in the ring when they see things pop up in different communities.

192 71 1 See full post

Even if it means disqualifying some of your prospects.

Mark Kosoglow
COO @ Churnkey.co | Chief Customer Officer
View my newsletter

Had to do something painful today..
I turned down a deal with a prospect who is excited and ready to buy our product.
Why?
They have a specific need we can't meet without one-off product development work that doesn't fit into our vision and roadmap.
Sure, we could have built it. And it might not have even taken that long.
But the reality is that their need doesn't fit into the value prop we're pursuing for our ideal customers.

Instead, we recommended a couple of competitors who can serve their needs today, and offered our team to consult with them along the way.
In business, and more specifically in SaaS, time is long and the world is small.
People remember when you do the right thing, even if it stings in the short run.

At the end of the day, people put a lot on the line to do business with a SaaS company. They make decisions that can make or break portions of their career.
Especially when it comes to mission-critical subscription revenue systems like the ones we work with.

So long, growth at all cost era. Here's to the era of playing to win the long game.

2,827 226 64 See full post

Practical bits ⚙

Arnaud Renoux
Get 2-5 warm leads/week for B2B Sales/Marketing directors (> 1M Rev/y...
3mo •

21 questions I use to qualify my prospects in under 30 min

675 17 20 See full post

Mor Assouline
Founder @ Demo to Close / Sales trainer & coach for SMB AEs and SaaS ...
Visit my website

I coach an SMB AE that makes $10,000-$15,000 per month. He doesn't ask "any questions?" or "does that make sense?" on his demos. I taught him how to "micro-close" throughout his calls instead.

897 114 22 See full post

Stuart Taylor
Sales Leader - Sales Coach - Sales Author
6mo •

Sales demos are easy.
Here's 3 steps for a simple but effective demo.

68 17 1 See full post

Krysten Conner
AEs win Enterprise deals with my strategies & systems Coaching & Fr...
View my newsletter

Took me 5 years in Enterprise Sales, but I learned a non-icky way to drive urgency (ie urgency that is Buyer Centric).
It's the friendlier cousin of a Mutual Action Plan/MAP. I call it a Visual Timeline.

613 79 11 See full post

Andy Mewborn
CEO @ Distribute.so → Turn any sales call into a deal-winning follow-up.
Visit my website

Ever notice how many "just checking in" emails you send...
and how they often go unanswered? Words matter.
Here are 12 phrases I've stopped saying to prospects (and what to say instead)

1,185 498 65 See full post

Samantha McKenna
Founder @ #samsales I Sales + LinkedIn + LinkedIn Ghostwriting Expert I...
1mo • Edited •

This quick script temperature checks your deal, gives logic for the pushback, and protects those that are giving your company time out of the goodness of their hearts.

1,111 154 7 See full post

Tangible Value Over Relationships

In 2024, sales is no longer about traditional relationship-building.

Buyers aren't looking for new friendships — they're seeking solutions that offer real, measurable business value.

Jake Dunlap
First Call for VC and PE-Backed Companies Who Need to Optimize Reve...
Visit my website

Sales is not relationship building in 2024

Buyers don't want a relationship with sellers

Most customers really want business value that makes their life better/easier

This isn't the good old days where people want "human connection" and to have a beer

Is this someone who is smart, seems relatively trustworthy, knows my space and I believe can help me....this is what 90% buyers actually want

Not golf

Not "how are the kids"

Not "look forward to meeting you"

Can you help me be better, smarter, faster at XYZ

Be an expert on their space, challenges they are facing and not how to read the 14th green

166 38 7 See full post

☠️ Belal Batrawy
#deathtofluff | Salesforce Top Sales Influencer | Outbound Sales Trainer |...
9mo •

Probably the worst advice I've ever heard in #sales is try to be helpful.
Definitely top 2 along with "sell value" 🤮

I can tell you right now elite sellers are not in the mindset of helping everyone...

They are:

- ruthless with their time
- always seeking to disqualify
- pressure testing their buyers early
- comfortable using friction to get what their looking for
- eager to speak with folks in a position of authority and power
- focused on using a system that produces repeat results for them

Elite sellers know what they sell is not right for everyone.

They know most deals won't close.

They know most prospects are not a fit.

They embrace that uncertainty fully.

They run to danger and red flags when others would shy away.

And this might be a tough pill to swallow, but...

They are selectively, selfishly helpful only with people who are mutually beneficial to their goals.

Yet, this goes beyond just being helpful.

Buyers, on the other hand, find the immense industry and competitive knowledge of elite sellers crazy helpful.

But that's the outcome, never the intent.

If you genuinely believe your positive attitude and desire to be helpful will win you deals, I really recommend reading the dozens upon dozens of studies on why people buy.

Buyers don't need you to pander to them.

They've got real issues, professional goals, and serious personal stakes.

Understand that selling is a game of losing less.

Which means being ultra picky with what you spend your time on.

125 39 4 See full post

Instead, top-performing salespeople focus on understanding what buyers truly value and tailoring their approach accordingly.

Charles Muhlbauer
Uneasy about your Discovery technique? I can help.
Visit my website

I have a friend who has no problem losing $45,000 on a stock option trade, but will refuse to pay $9 for a hot dog at a baseball game.

We all perceive value differently.

So do your prospects.

Don't sell your value prior to first asking them what they value.

It might misalign.

266 37 4 See full post

Anthony Natoli
Senior Account Executive @ LinkedIn | I post about sales, mindset & pers...
7mo •

AEs and SDRs:

Your prospect is already getting the job done without you, otherwise they'd be coming inbound!

So, when you are doing outbound, or get a prospect on an initial meeting, stop talking about:

-Your features
-Your customer logos
-Your recent product updates

Your job when prospecting is to come with a strong POV / Observation of what's going on in their business.

Or if it's a discovery call, using that hypothesis to confirm what they're looking to accomplish, why it matters now and what happens if they don't accomplish it.

Then, you need to educate them on the problems people like them typically run into when looking to accomplish said initiative.

Your job is to illuminate a potential problem they weren't even thinking about.. Because again, they are already getting the job done or planning to get the job done without you.

249 33 6 See full post

Jeff Rosset
CEO @ Sales Assembly | Connector | Pizza connoisseur
5mo •

The “proposal stage” in your sales cycle should be eliminated. It means absolutely nothing.

A proposal is just your pitch deck….with pricing from your website included

How does that add value to the buying process? What does that teach the prospect after they’ve already spoken with you? How does it help move the deal along?

Every proposal stage should be replaced with a business case stage. Huge difference

✅ business cases are written in the buyer language…proposals are in your language.

✅ Business cases explain expected value to be received for this specific situation…proposals have a logo slide and testimonials that showcase others.

✅ Business cases are usually short and to the point. Proposals often have lots of fluff and filler slides that nobody wants to read.

✅ Business cases discuss client budget and where it will come from….proposals show vendor pricing.

✅ Business cases highlight and disect the buyers needs….proposals highlight the vendor features and benefits

101 21 1 See full post

Buyers are already functioning without the product, which means sellers need to create a compelling business case at each stage of the sales process...

...or introduce a new stage in the sales process to accommodate that.

Patrick Trümpi

The result?
✅ Defined ROI
✅ Fans for the rollout
✅ Enough information to make an offer
And all this in 3-4 hours
Usually, that takes months
Prospects love it
Salespeople love it
Customer Success loves it

Patrick Trümpi
CRO at Taskbase
8mo •

We went Enterprise 1.5 years ago. Selling to financial institutions with more than 400 employees exclusively. In our first market, we already won 19 out of 47 potential customers. That is 40% of the market in 1.5 years
How did we do that?
We implemented a step in the sales process that was a real game-changer - the "Value Workshop"

Most deals stall after the demo. The prospects usually say something like:
"We need to see internally if that makes sense to us and get back to you. We need to understand what use cases fit right now for us. That takes time"
The salesperson: 😬 🤷‍♂️
Most salespeople do not know what to do. They are lost. Their sales leaders say: Our "sales cycles are too long." Because prospects are lost as well. It takes them at least 3 months to get organized and discuss this internally
What can salespeople do about it?
Proactively suggest the workshop
Most prospects love you for the guidance
And accept the suggestion (actually more than 85%)

The workshop is structured in the following way:
1️⃣ Introduction participants
2️⃣ Why, How, and What of the solution you discussed
3️⃣ Participants write down all use cases that come to mind
4️⃣ Participants prioritize the use cases and select the top 3
5️⃣ Define the impact of solving the top 3
6️⃣ Feedback session & next steps

456 12 9 See full post

As a result, proper discovery is a must to get a deeper understanding of your customer's business case.

James Bissell
Founder @ The Revenue Enabler | 2x VP Sales | Sales Training That Get's...
Visit my website

I banned my AEs from doing demos on discovery calls.
The result?
Win rates went up more than 3x!

The main reason I banned demos on discovery calls?
They were feeding a scary amount of noise into the forecast!

When I would ask:
→ Why do they have to buy?
→ Why will they buy from us?
→ Why do they have to buy now?

I'd hear tumbleweed or the same answers across all accounts.
I wanted reps to articulate the problem better than their prospect could.

So, I gave them my **What We've Heard** slide.
Reps had to complete the slide and present it at the start of the demo which:
1. Forced good discovery
2. Showed the buying group we were listening
3. Brought new joiners up to speed immediately
We would always learn something new when presenting the slide too!

267 65 5 See full post

Even if there's no fit.

Kimberly Pencille Collins
VP, Strategy + Enablement @ #samsales Consulting + Startup Chameleo...
1mo •

You're on a discovery call. The prospect shares their challenges, but you realize they're not the right fit for your solution. What do you do?

Most sellers would push their product anyway or disappear completely. But, a discovery call is our opportunity not to sell, but to SOLVE.
Even when it doesn't serve us.

If they're not a fit, refer them to someone who is.

Don't know anyone?

Tap into your network. Ask your colleagues. You can always find someone.

Why go the extra step?

Because standing out in sales means doing what's unexpected. While they expect you to sell anyway or disappear, showing that you genuinely care builds your brand.

They might not buy today, but tomorrow is another story. And they might refer you to someone who will buy.

The tiny things we do to be different do matter.

117 29 See full post

Effective demos are no longer about product features.

Max LÜPERTZ
Better Demos = More Dineros 🤘 | Demo Skills for fast-growing SaaS to c...
Visit my website

In demos, the spotlight should be on your customer's needs, not on your product's features. Here's how:

Customer's Challenges First: Start by understanding your customer's specific problems. Your demo should directly address these, showing clear solutions.

Solutions Over Features: Focus on how your product solves their issues, rather than listing its features. The goal is to demonstrate value, not just functionality. Your job is to translate technology into economic benefits.

Simplicity Wins: Keep it straightforward. Overcomplicated demos with unnecessary details can detract from the main message: how you solve their problem.

Personalize Your Approach: Tailor each demo to reflect the customer's context. Generic presentations won't cut it.

3,019 206 58 See full post

Instead, they focus on the buyer's unique needs, leaving room for a deeper, consultative conversation.

Sara Jones
Leading The Solutions Conversation | Chief Solutions Officer | "The Won...
7mo •

The MORE I'm in solutions, the LESS I care about demos.
This might be shocking to you because for most: solutions = demo.
When solutions (aka presales) is actually about:
- Discovery
- Strategy
- Soft-selling
- Conversations

By the time you GET to the demo - the heavy lifting should be done.
The customer insights should be extracted, the detective work - finished.
Demos matter, don't get me wrong. But what matters a lot more?
The steps that happened BEFORE the demo.
The demo is just the proof point.
The cherry on top.
NOT the cake.

546 91 14 See full post

Josh Braun
Struggling to book meetings? Getting ghosted? Want to sel...
1mo •

An Open Letter to Salespeople
Relax.
Just relax.
It's not your job to talk people into buying.
You don't control when or if people buy, so it's madness to obsess over it.
All that matters is that you show up and do the work to the best of your ability.
That's all you can do.
There's peace and tranquility in that.
We tend to think about sales as just results.
But closing isn't the only point of selling.
It's also about opening.
Opening you up to the wonderful people you meet.
Opening you up to new skills.
Opening you up to different perspectives.
All of that makes you a more interesting person, no matter what the results are.
Nobody has it all figured out.
I think it's helpful to view sales as a series of tiny experiments.
We can't predict the outcomes.
Whatever the results, we learn something that informs future experiments.

5,365 321 336 See full post

Ultimately, modern sales requires less pressure to "convince" and more emphasis on elevating the buyer's experience without forceful selling tactics.

Josh Braun

If you approach sales with a mindset of experimenting and detaching from the results, the work becomes easier and more enjoyable.
Obsess over outcomes, worry and suffer.
Do your best, detach, and relax.
You get to choose.

Practical bits

Keith Weightman
RVP, Sales @ Bullhorn | Weekly sales & visual tips at tips.keithweightman...
1mo •

The buyer approved definition of "Salesperson":

"One who helps someone buy, without 'selling' anything."

People love to buy - but hate being sold.

7 tips to help others buy (without 'selling'):

1 / 10

343 | 59 | 15 | See full post

Gal Aga
CEO @ Aligned | Don't Sell, offer Buying Process As A Servi...
Visit my website

Over the last 6 months, I spent 20 hours interviewing the best AEs in SaaS (at companies like Gong and Demandbase). Here's the counterintuitive way they're all winning deals right now:

They don't 'Sell'.

They offer 'Buying Process As A Service'.

2,616 | 3,287 | 47 | See full post

Discover data-backed insights into buyer-seller relationships to build an effective B2B sales strategy for 2025.

Free ebook

4

GTM Efficiency and the Role of Enablement

Jacco van der Kooij
Working with customers opened my eyes and changed my life | Being kin...
2mo •

Today, in Silicon Valley, we are witnessing a fundamental shift as we transition into the era of sustainable growth.

Startups are meant to grow fast, meaning the growth rate must be valued at a premium over the cost of growth. Period. Or perhaps, a comma—because growth happens in stages. For example, in the early stage (<$10M in ARR), GAAC is not only acceptable—it's essential. At this stage, founders often fly cross-country to close even small deals, a stage popularized as "Founder Mode."

However, when a company reaches $100M in ARR, mature processes should take over. This doesn't mean sustainable growth is achieved yet, but the team should at least have insight into and control over the cost of growth. As someone who has sat in the room with dozens of public SaaS companies, I can tell you this is often NOT the case, even at $1B in ARR.

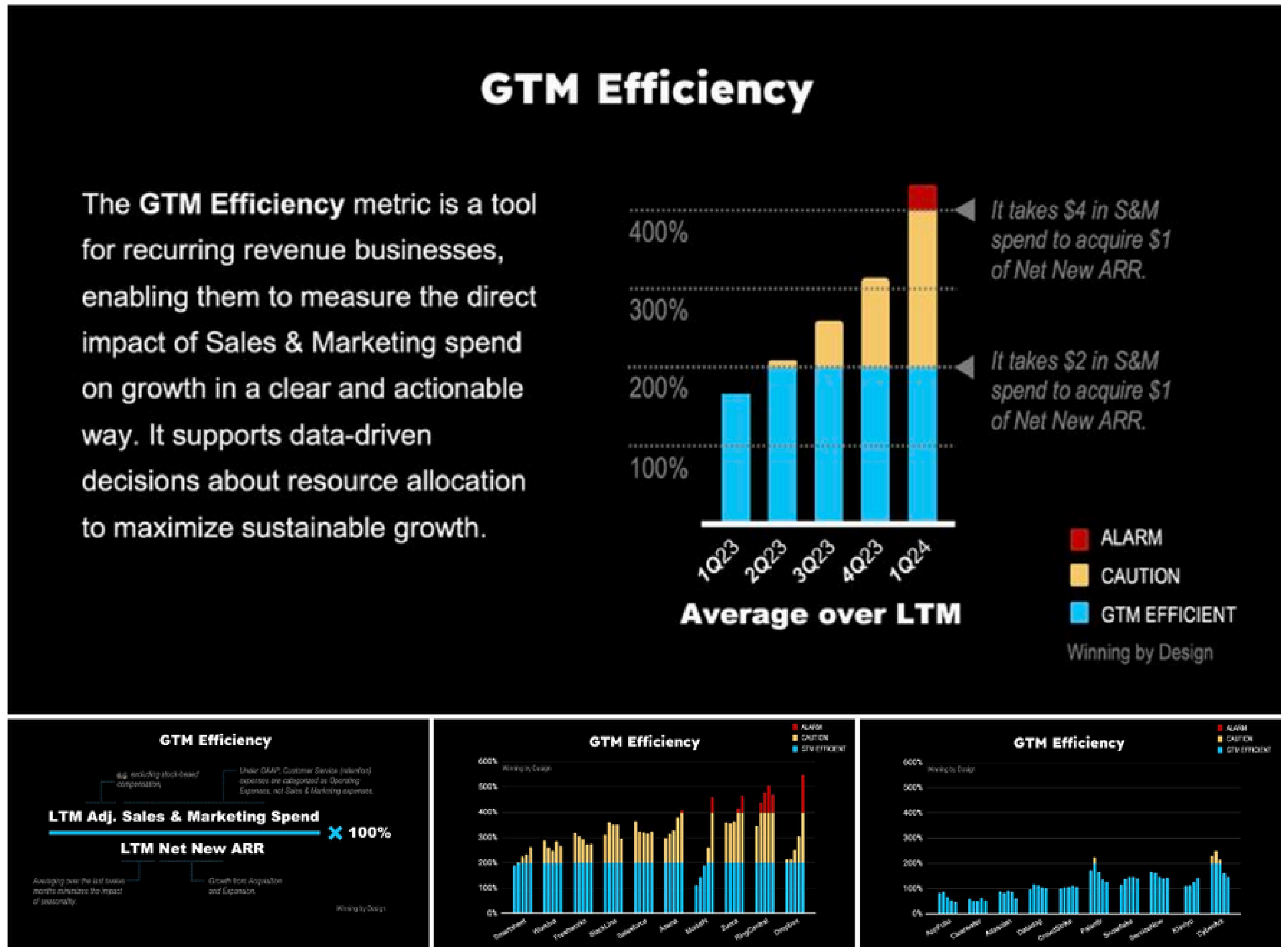
As the Founder/CEO of a $6B exit recently confided, "The state of expertise is woeful; not enough people put in the hard hours to learn the trade. Revenue generation is the result of repeatable processes."

Think of a high-touch Enterprise GTM motion vs. a no-touch PLG-based GTM motion, each operating differently. When receiving $50M in funding, the team needs to know where to invest to achieve hypergrowth. This means executives must compare which GTM motions are more sustainable over the years to come, and for that, we need a new metric.

Enter the room "GTM Efficiency"—a metric that guides operators on where to invest for the most cost-efficient growth, enabling the operation of successful hypergrowth businesses.

662 73 25 **See full post**

This year, one metric to watch was GTM Efficiency, as opposed to the "growth rate."



SaaS sector was still struggling with a **slowdown in growth.**

But also trying to tackle the **"SaaS Churn Bomb."**

Tom Glason
SaaS GTM Leader → CEO @ ScaleWise | Helping B2B tech scale-ups driv...
Visit my website

The last couple of years have been pretty tough for GTM leaders in B2B tech.

The cost of capital has been at its highest point for over 15 years.

So budgets have been tightened and there's been an increased scrutiny on ROI.

This applies to our own orgs. but also to the clients we're looking to work with.

As a result, we've seen sales cycles lengthen by 22% (Gartner) and the average number of stakeholders increase to 11! (Forrester).

With this backdrop, GTM leaders have been forced to look at ways of improving sales efficiency and driving results under tighter constraints.

1,226 | 170 | 64 | **See full post**

Ryan Cahill
SaaS CRO + GTM Executive | 15+ years | Retained Executive Consultant
Visit my website

The number one problem facing the SaaS industry right now is not the slow down in growth and GTM effectiveness...it is the financial/realized value audit being done of all technology systems.

Every company, particularly VC funded SaaS companies, are conducting a financial audit of their tech stack which is forcing the a review of the realized value of their SaaS solutions. The unfortunately conclusion for many of these, to quote the movie a KnightsTale, "you have been weighed, you have been measured...and you have been found wanting".

For too long the frenzied pace of SaaS growth, and the demo-hyped sales process has lead companies with dozens of systems that were purchased with an aspirational and strategic value proposition that in most cases never passed go in terms of implementation. SaaS companies became complacent and disconnected from customer value, accepting that their system being "turned on" was an implementation. Companies were celebrating customer self-service for the money it saved and how "user friendly" the claimed their systems to be, all the while thew adoption rate, usage and impact declined.

Now churn is barreling through the door at an ever increasing rate, renewals are becoming as hard as initial sales and expansion is a political landmine discussion.

26 | 7 | **See full post**

Successful companies prioritized sales enablement - processes and tech.

Eddie Reynolds
Strategic RevOps Consulting for B2B SaaS
View my blog

I spent 3 years at Salesforce
- Watching customers waste their money
- Getting zero impact from their rev tech stack

The companies that succeeded...
Revenue leaders treated Salesforce as a top priority. They joined every key meeting, carefully mapped out the sales, marketing and/or service process and just committed to make it work.

Salesforce reports were fine tuned to show if the process was being executed, if it worked and if reps adopted Salesforce. Management kept at it until it did and then kept at it to keep it working.

In 3 years I never saw a single one of them fail by simply committing to it.
It's the process, not the tech.
This is why we don't scope out technical projects without the right process.

Tools alone will not save you.

1,689 · 184 · 67 · See full post

As more leaders came to realize that people should focus on people and not waste their time on data entry.

Jonathan M Kvarfordt, MBA
GTM & AI Performance & Strategy Executive | Board AI Advisor | Strategi...
Visit my website

HUMANS SHOULD BE FOCUSING ON THE OTHER HUMANS, the relationship, and the overall experience.

Not data entry. AI is relentless in catching every detail—the pain, the situation, the critical moments—all without error/Just check the stats:
• AI boosts productivity by 15-20% in sales processes.
• It cuts down manual errors by a staggering 60%.That's huge.

It's not just about efficiency—it's about making sure you're acting on complete and accurate data.

And with 77% of execs saying AI is going to be critical for decision-making in the next few years (from Deloitte), this shift is happening now.

454 · 42 · See full post

Yet, at some point, the term "enablement" has even become so overused and misapplied, that is almost lost its meaning.

Stephanie Middaugh
Enablement at Pinecone 🚀 | Author ✏️ | CEO at Phoenix GTM Consulting ...
3mo •

🌟 Enablement is a function. Not an action. 🙅‍♀️

🤔 What are you trying to accomplish, or what is your end goal when you say, "We need enablement"? Do you want to train? Educate? Change behavior? Develop a skill? Inform? Those are actions. Those are ✨actual✨ activities that you can prepare content (training, assets, collateral, etc) for, tie outcomes to, and measure success/impact with. 🙌 (And no, not everything needs a 'training' either 😤).

🏆 Enablement as a function encompasses SO many different strategic and tactical components. Not only does it cause confusion and miscommunication to throw the word around so flippantly, but it does a serious disservice to everyone: Leaders, Enablement professionals, and the teams they support.

So what do we do? I have started challenging myself to use different words to try and shift the narrative and explicitly explain what I will deliver or needs to be delivered.

👍 "We need to train and assess our teams' knowledge and understanding on this new product that they're being asked to sell"
👍 "We can inform our teams about this new process"
👍 "We have a bi-weekly informational call"
👍 "We need to create collateral for our teams to use with Prospects"

196 40 10 See full post

Nick Lawrence
Building an environment that enables sales performance | Enablement @...
2mo • Edited •

"We need some enablement."

Here's what's wrong with that statement…

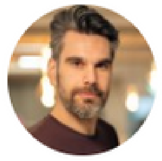
Most people use "enablement" as an umbrella term - usually for anything focused on influencing knowledge & skills.
BUT…
The definition of enablement is "providing the MEANS for someone to do/achieve something."

The means:
- process
- prompts
- feedback
- resources
- incentives
- assistance
- information
- opportunity
- expectations
- management
- accountability
- consequences
- knowledge & skills

When someone asks you for enablement, ask: "What do you MEAN?!?"

134 21 8 See full post

To make sales enablement effective, teams need to understand sales culture better and tailor their processes accordingly.



Aaron Evans
Voted Top 20 Global Sales Enablement Influencer | Lover of all things sal...
Visit my store

Sales enablement teams need to get better at understanding sales culture!

This for me is the one of the biggest failings of modern enablement.

Sales is an 'in the moment' sport!

So why would a salesperson rifle through a 200 page playbook to find the information they need?

Why would a salesperson follow a 90 step sales process?

Why would a salesperson be coached by someone who hasn't themselves been trained to coach?

Sales enablement teams should be shipping enablement that is easy to use, accommodates busy salespeople, and drives the correct revenue outcomes.

I see way too many complicated, unusable and inaccessible programs that aren't built with the end-user in mind.

My recommendation to growing sales enablement functions is to either listen to their internal customers (we preach this daily) or hire someone from a sales background who can understand the role of their internal customer.

Oh and lastly, it's meant to be FUN! Stop killing the fun of sales with unnecessary process.

117 18 1 See full post

Moreover, many people also called to redefine the role of RevOps.

Haris Odobasic
Writes about GTM & RevOps | Co-Founder at Revenue Wizards
Visit my website

RevOps is not HubSpot
RevOps is not Salesforce
RevOps is not a System Admin

Some solutions provide fuel to the misperception
by cobranding their solution as RevOps.
I don't like that as that is not RevOps.

What is RevOps instead?
- RevOps is a mindset.
- RevOps is a department.
- RevOps is all about efficiencies.

Efficiencies you need for a sustainable business - to burn less cash and improve your margins.

In 2024, nothing is as important as efficiencies.

Will a CRM help you become efficient?
Maybe, with a marginal impact within the CRM.

Will RevOps help you become efficient?
Yes, but if you have "real" RevOps:

- RevOps is a strategic business partner for GTM
- RevOps is empowered to drive projects across L2C
- RevOps also focuses on Enablement, Process, and Analytics (not just System Admin)

424 61 15 See full post

Jacki Leahy ✨
Fractional RevOps for Zero to $10M 🪄 Conjuring Revenue + Catapulting ...
Visit my website

RevOps is not a C-level executive function.

If you want to be driving strategy, you are not qualified to set up the data infrastructure.

If you want to manage the board-company relationship, you're not qualified to design processes.

If youre in the C-suite, you should not have admin privileges.

C-suite members have a job to do - manage the company's PR with the board and market. Make and own strategic moves.

You can't own the decision and set up the tracking. Church and State.

RevOps is the hub of the company. Any time you've got an opinion to prove, you're no longer guided by scientific method.

It's like the pharma CEO being in charge of drug trials. No. Not responsible.

RevOps needs to be neutral and loyal to the revenue engine system.

RevOps can be a path to the C-suite, absolutely. But once you're there release your admin privileges and trust your RevOps leader.

RevOps is Switzerland. Precision, diplomacy, neutral.

208 37 2 See full post

The “ops” function is being adopted across all revenue teams, not just sales.

Matthew Volm
CEO and Co-Founder @ RevOps Co-op, a community of 14k+ RevOps pr...
4mo •

If you're job title is CRO, this might be a tough 💊 to swallow, but...
...if you're only responsible for the sales team, then you're not a CRO.
You're a VP of Sales, or maybe a Chief Sales Officer (CSO).
But you're not a Chief Revenue Officer. 😨
Same thing applies to Revenue Operations.
If you have a job title in RevOps, but you only support the sales team, then you're Sales Operations.
Sales is very much a driver of revenue, just like SalesOps is a slice of RevOps,
But they are not the same thing, so lets not call them the same thing.
Instead, here are the ways that I look at each.
📌 Chief Revenue Officer = marketing + sales + customer success
If you're just responsible for marketing, you're a CMO.
If you're just responsible for sales, you're a VP of Sales or a Chief Sales Officer.
If you're just responsible for CS, you're a Chief Customer Officer.
The CRO is collectively responsible for all of these things.
📌 RevOps = marketing operations + sales operations + CS operations
If you're just supporting marketing, you are Marketing Operations.
If you're just supporting sales, you are Sales Operations.
If you're just supporting CS, you are CS Operations.
RevOps is collectively responsible for all of these things.

227 | 34 | 1 | See full post

While some even suggest introducing a new role — the GTM or Growth Ops.

Kyle Poyar
Co-Founder & Operating Partner | Growth Unhinged
1mo • Edited •

Tomorrow's next hot GTM hire won't be an AE, SDR, demand gen person or content marketer. It'll be a GTM/growth ops owner.
Someone who's more comfortable in Clay than they are in Salesforce. Someone who's favorite TLA is ICP rather than MQL.
They'll not only know about the next-gen GTM tech stack (Keyplay, Unify, 11x, Warmly, RB2B, Champify, Apollo, lempire, etc).
They'll own the overall buyer journey from identifying the right ICP to building ICP pipeline and converting pipeline into revenue. And they'll run experiments to find the best possible way to turn ICP accounts into $$.
It won't matter whether that's through AI, DIY automation, off-the-shelf tooling, product experiences, outside vendors, paid programs or good ole fashioned sales people. What matters is that it works and is cost effective.
- Orchestrates a unified buying journey
- Runs rapid experiments across that journey
- Equally as comfortable with spreadsheets as with creative ideation
- Well-versed in the latest technology & automation
- Able to influence other leaders across functions (including the CEO)

The hard part: what are we calling these folks?
I've seen: growth engineer, chief of staff, head of growth, GTM ops, RevOps, special projects. Please send help.

1,735 | 331 | 20 | See full post

In 2025, we must also address outdated practices that permit sales reps to navigate without clear guidance...

Rosalyn Santa Elena
Founder at The RevOps Collective | GTM Strategy & Revenue Operations...
Visit my website

🤦🏻‍♀️ Can we please stop doing this?

🚫 Please stop letting our sales reps "cherry pick" accounts to work

🚫 Please stop making them "fly blind" into random companies

🚫 And please, please, stop making them 'hunt and peck' for contacts to reach out to...

With all of the data available to us...

💁🏻‍♀️ Why are we not -
Finding the right accounts to assign to our reps?
Prioritizing those accounts based upon relevant criteria?
Sharing the right contact information for the right target personas?

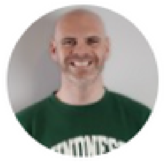
🤦🏻‍♀️ Too often I see companies not being proactive in providing -

the right accounts (ICP!) -
the right contacts (target personas) -
at the right time (intent, seasonality, compelling events, leadership changes, etc., etc.) -

With the increased focus on optimization, efficiency, and effectiveness -

💁🏻‍♀️ Isn't this "table stakes"?

85 | 30 | 2 | See full post



Andy Whyte
CEO at MEDDICC - Not all MEDDIC is equal ≠
Visit my website

I had the most astonishing conversation with a salesperson recently...

They told me they felt all sales training was a waste of time.

I was a little bamboozled, but I recovered enough to ask:

🤨 "*Do you think you have nothing left to learn*?"

To which their answer was:

💁‍♂️ "*Yes*... *I've been doing this XX years*..."

I asked if they have a 100% win rate, and they said that was a ridiculous question. I agree, but it's less ridiculous than thinking you know it all.

For me, sales is ever-evolving, and with every evolution come new challenges and opportunities to innovate and improve.

Every time our industry levels up so does the quality of our competition, and subsequently, the bar of expectation goes up.

253 131 1 See full post

...and embrace coachability to be able to innovate and improve.

Andy Whyte

I have the great privilege of working with some of the best salespeople in the world. They all have one thing in common—coachability.

Considering all the pressure sales teams face, their well-being is once again brought into question, now as a **formal part of the sales enablement strategy.**

Jeff Riseley
Sales Leader, Stress Less 🧠 Sell More💸
9mo •

Which company is going to be the first one to hire a "VP Sales Enablement of Well-being"? 🤔

Here is the start of a job description to help you get started:

The VP Sales Enablement of Well-being position was created to help optimize sales team performance at X COMPANY through better Mental Performance and well-being.

Your main mission is to ensure each member of our sales team is showing up recovered, managing stress effectively, improving their mindset and feeling their best so they can perform optimally for our customers. 📈

Key responsibilities include:

⚫ Create + lead training that improves sales team mental fitness.
⚫ Be a confidant for front line managers and individual contributors.
⚫ Implement well-being KPIs to manage burnout.
⚫ Collect and analyze mental performance team data.
⚫ Report on mental performance to upper management.
⚫ Work with CRO to set balanced sales targets.
⚫ Develop processes that promote "active recovery" of the sales team.
⚫ Work with enablement to design new hire onboarding.
⚫ Work with HR to evaluate and provide Mental Health service providers.
⚫ Design processes to improve openness, inclusivity, Psychological Safety and vulnerability within sales.

78 30

See full post

Practical bits ⚙️

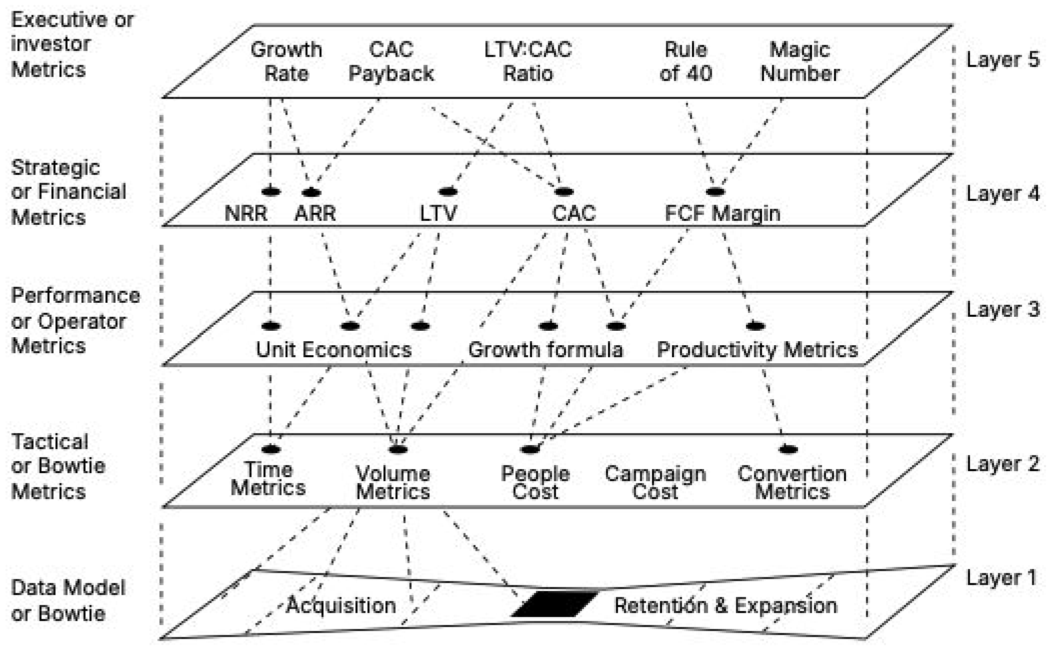
Jonathan Moss

Revenue + AI Executive & Operator | Board AI & GTM advisor | Optimizin...

3w •

Most organizations today operate on strategic or investor metrics. In contrast, GTM metrics are more action-oriented and are often referred to as Performance or Operator metrics.

Now, here's the key to wrangling your GTM metrics:



402 66 19 See full post

Stephanie White

Connector, Problem Solver & Believer in People | Revenue Enablement L...

5mo •

Here's 5 things you can do to enable yourself as an enabler today:

👋 Engage 1 new enabler outside your current company a week

📅 Block 2 hours a month for self learning (I like Friday afternoons)

🧑‍🏫 Get a coach or mentor - paid or free. Knowledgeable sounding boards are key.

🧭 Make a growth plan - include your 12 month goal and milestones along the way. List stakeholders, resources and where you'll need help.

📣 Commit to someone else - mentor, manager, buddy, all of LinkedIn - whoever. Research shows those who share their goals in public are more likely to follow through.

Just like we commit to the steps to develop pipelines of revenue for the business, let's build a pipeline of revenue for you ✌️

86 43 See full post

5

The Power of Process

In an attempt to achieve GTM efficiency, the focus has shifted from simply filling the pipeline to optimizing the entire sales process.

David Weiss

Stop telling your team they need to be better "closers"

Focus on turning them into masters of the behaviors that make it easy to buy

David Weiss

CRO | I Help People Win Life-Changing Deals & Startups Create Sustaina...

Visit my website

I've heard this 1000 times, "Our team struggles closing deals"

None of them had a closing problem. The real problem(s)?

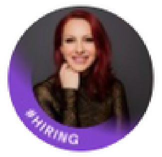
1. They didn't ask the "peeling the onion" questions
2. They were unable to identify the root cause of the problem
3. They weren't able to connect metric improvement to business priority
4. They weren't able to turn the things they learned into a business case
5. They were stuck in the middle (no end users or executive relationships)
6. They lacked the ability to craft the decision criteria through differentiation

Everyone wants to improve win rates

Everyone wants their team to be better "closers"

But the fact is, closing is a byproduct of a well run sales process

1,232 79 72 See full post



Christina Brady
CEO & Co-Founder of Luster | Pavilion Chicago Chapter Head | Sales Tra...
1mo •

"Let's have everyone do what our top rep does!"

Careful…

Success isn't replication of a top rep.

It's not creating a team of look alikes.

It's arming your team with the tools (like Apollo.io) training, practice, and coaching that they need in order to be the best version of themselves.

If your tactic is to identify a top rep, and carbon copy them...pause.

Identify the top skills and behaviors that lead to multiple business results.

Any experienced revenue leader knows that your highest performing rep from a quota standpoint isn't necessarily your best rep, and they may not have behaviors that you want to replicate.

Objective data, and diversity is the key to a successful sales team.

90 25 See full post

So, instead of simply trying to replicate top reps, sales teams prioritize building systems that deliver consistent results.

Christina Brady

Remember, people do whats caught, not what's taught.

If you don't have a way to identify hidden skill or behavioral gaps that are impacting your revenue, you'll always be chasing your KPIs.

Yet, sales leaders often struggle to implement methodologies or build alignment within the GTM team, which is crucial for sustainable growth.

Jerry Pharr
I help GTM teams deliver sales excellence at scale. I advise startups. An...
8mo • Edited •

Hey sales leaders: Are you tired of sales methodology implementations failing? Don't blame the vendor. It's probably on you.
Eventually, nearly all B2B sales orgs invest in a sales methodology. Sometimes a homegrown one, more often from a vendor.
The initiative almost always falls short of its goals. Customer convos & rep competencies don't improve. Ramp time doesn't decrease. Win rates & attainment don't increase, etc.
At least not for most reps, not for very long, and not in a measurable way.
Consequently, it's common to criticize the methodology itself. And there's a kernel of truth to these complaints:
1. They're too theoretical, not practical.
2. They're only qualifications checklists or a communication strategy -- not both.
3. It's nearly impossible to measure their impact in a believable way.
4. And they're never reinforced long-term.
I've personally felt these pains.
But here's the thing:: The methodology is rarely to blame for these failings. The head of sales is.
Because these complaints are fundamentally about a lack of internal systems & infrastructure to reinforce the implementation. And a branded methodology cannot reasonably be responsible for that.

115 46 10 See full post

Alex Kracov
CEO and Co-Founder at Dock
7mo •

I started at Lattice as the third employee back in 2016 and ran marketing for five years. During this time, we grew revenue from $0 to $50m+ and built a marketing foundation that led to the creation of a business worth $3.5b. 75% of new business came from Inbound.
[...]
All of these programs started small and scaled over time.
For example - our first webinar only had 20 people sign up, but five years later we were running a virtual event with 40,000 people. It's amazing how much marketing programs compound if you invest in the right things and commit to channels.
The scaling part is only possible because we were able to build an amazing marketing team. The secret was hiring people better than myself.
We also significantly invested in marketing's relationship with sales.
Marketing generated the pipeline, but Dini and team closed it.
We thought of our GTM motion as an alley oop.
There was no drama between sales and marketing.
We were all on the same team working together to build pipeline and close deals. Marketing was constantly working to build sales collateral - competitor battlecards, new pitch decks, product explainers, etc. - that helped answer key moments in the sales cycle.
It's only with this close sales-marketing partnership were we able to build a GTM machine that eventually grew Lattice to a $100m+ revenue business.

520 60 1 See full post

We need to reframe the role of activity metrics; sales isn't about tallying attempts.

Jamal Reimer
I help enterprise sellers find and close the biggest deals of their career t...
Visit my website

There is a TOXIC idea in B2B sales which has been around for ages.

And it's ruining the lives of sellers everywhere:

"Sales is a numbers game."

Fallacy: the more emails, calls, demos and meetings you produce,

The more successful you will be.

This is absolute BS.

Sales is an impact game.

Only high quality sales activity move the needle.

So take the time to research your audience before reaching out to them.

Dig deeper into your customer's business reality before demo'ing.

Help resolve messy customer experience issues before asking for the renewal.

Because sales is an impact game, not a numbers game.

618 · 102 · 19 · See full post

Salespeople are ultimately paid to win, not just to stay active.

Andy Paul
Win more than you Lose | Advise CEO/CRO on win rate strategy and exec...
4mo •

You're not paid to sell.

You're paid to win.

You're not paid for your activities.

You're paid for the outcomes you achieve.

You either helped your buyer make the business decision to make a change. Or you didn't.

There are no participation trophies in selling for meeting your various activity metrics.

"There's likely a place in paradise for people who tried hard, but what really matters is succeeding. If that requires you to change, that's your mission."

That's General Stanley McChrystal from his 2015 book Team of Teams: New Rules for Engagement in a Complex World.

Change is your mission.

No one wins 100% of their opportunities.

But everyday, everything you do, should be examined in the light of what you need to learn, improve and change to help you move one step closer to doing just that.

132 · 21 · 7 · See full post

Today more than ever, your sales processes need to align with the preferences of younger buyers.

Will Aitken

A great buyer experience can be the tiebreaker on deals.
I literally had people tell me they bought from me vs. a competitor because our products looked the same but our experience was way better.

Will Aitken
Trust Me, I'm a Salesperson | Coach, Speaker, and Pisstaker | Fluent in E...
View my newsletter

Your sales process is giving boomer vibes.

Saw Matt Heinz's post referencing some Forrester research about B2B buyers getting younger
71% of buyers are now 45 y/o or under

Here's why I think that matters (as a 29 y/o):
Younger generations are even more prone to doing a lot of research online before speaking to a human (it's how we were raised)
Many younger folks hate speaking on the phone and taking phone calls (obvs not me 😈)
Buying trends have shown younger generations are even more likely to opt for self serve vs interacting with a sales rep (McKinsey 2021)

So what does this mean for us sellers & GTM people?
We need to make our sales processes more aligned to these trends.
Not brute force a sales methodology/process because it'll just put people off, meet people where they're at.
Make that process smooth like butter for any level of buyer, hot or cold.
Add elements of self serve into our processes.

I recently read David Priemer's "Sell The Way You Buy" and there's an amazing piece that talks about buying a new phone…
All things the same (price, proximity, stock) would you rather buy an iPhone from the Apple Store or Best Buy?
Apple Store! ✅
Even though the product is exactly the same, it's a wayyy better experience in the Apple Store
Everything is clean, the people know their stuff, they don't go too hard on the sell, I can see, touch, test, all the different products & colors

487 126 8 See full post

Matthew Codd
SaaS GTM specialist | Co-Founder of Cosmic Partners | Working with VC ...
Visit my website

I hate lateness.

I've noticed increasingly on meetings I have people show up late.

I personally think that top performers don't show up late.

These have been sales discovery and demo calls that the salesperson has joined a few minutes late.

No apologies, nothing. Like it's normal and acceptable.

Anyone that knows me will know I'm a stickler for showing up early, but a few minutes staring at yourself is a long time for a potential customer...

There are so many flags that come to mind when this happens.

It really sets the engagement off on the wrong foot.

I can always see the difference compared to a top performer who has joined early and is fully prepared.

Personally, I stick to being:

- 30 mins early when working in an office
- 15 minutes early for a face-to-face meeting
- 3 minutes early for an online meeting

203 134 4 See full post

Small, intentional improvements in the sales process compound over time, creating a significant impact on outcomes.

Matthew Codd

Every part of the selling process to ensure they are making the right decision.

Even if a prospect won't acknowledge them all, it's the small things in a sales process that compound and make the difference!

6

Customer Success = Business Success

In 2024, Customer Success is facing a real turning point. It's no longer just about keeping customers happy.

Jeff Kushmerek

I fix broken Customer Success and Implementation teams | Retained ove...

Visit my website

Still in shock to hear that some CS Leaders won't take revenue responsibility

I remember when, in 2017, a good friend of mine came to me and told me that he was being asked to take revenue as a CS leader. But he had the choice.

I said quickly - don't be a cost center....

I had already spent 15+ years in the Professional services game and had just gone through an IPO as a profitable P&L leader, so I was a little biased.

TLDR—he didn't take the revenue and was laid off a few months later.

Fast forward to today- customer success is increasingly moving under Sales. CSMs that primarily focus on relationships and not renewals or upsells are having problems keeping and finding employment.

My advice is still the same.
Take the revenue
Also, create recurring services that will turn Customer success into a revenue center.

160 46 2 See full post

Kristi Faltorusso
I help Customer Success Professionals and Leaders improve retention, g...
Visit my website

Hey CSMs ... I've got bad news for you, you're in sales.

I'm getting tired of hearing from Customer Success professionals that they "aren't sales" - Almost to suggest that's a bad thing. We need to let go of the "used car salesman" vision of what sales was.

Sales is actually very strategic. Great sales reps are doing the following:

▶ Conducting prospect research: They are often going deep not just on the customer but their industry, the market, the competitive landscape and so much more

▶ Building Relationships: AEs are navigating complex org charts working to establish trust and working to turn prospects into advocates

▶ Handling Objections: They are preparing responses to objections and focusing on the value of the product

You know what's so funny about that ... That's what CSMs are also responsible for.

At the end of the day, whether you're the owner of the commercial activities in your company or not, you are responsible for selling ... you're selling VALUE!

Great CSMs spend time selling:
1) The value of their platform/services
2) The vision of the partnership
3) The solution to future pain points

So if you're in Customer Success and you think you're not in sales ... You're wrong.

712 133 17 See full post

CS teams are now expected to deliver real business impact, even contribute to revenue directly (and demonstrate that to the management).

After all, customer renewals don't just happen on their own.

Elizabeth Italiano
Go-To-Market and Revenue Leader | Named Top 100 B2B GTM Female L...
Visit my website

I had an upcoming renewal that I was nervous about.
I had regular engagement from my main point of contact, and the client was hitting their goals.
However, I was single-threaded. I was nervous because I wasn't convinced that other key stakeholders were aware of the value that they were getting out of the use of the platform and how it was positively impacting their revenue.
4 months out from the renewal, I asked the champion if they minded if I reached out directly to their VP. I asked because I didn't want her to feel alienated and like I was going around her to try and exclude her.
Here's where things started to go wrong 😩 She said she did mind and would pass on any communications on my behalf 😬 I didn't like the sound of this.
While they were achieving their goals, I knew she was frustrated because our platform required a lot of hands-on effort on a daily basis.
Initially, I acquiesced and did not reach out to her VP. Although she wasn't the decision-maker, I knew I needed her buy-in for the renewal.
Fast-forward 30 days before the renewal. We found out the executive team is re-evaluating, and they are not committing to renewing. We ended up having to give them a 30 day extension and hit the dreaded push button on the renewal close date.
In the end, we closed the renewal and expansion deal. My now (genuine) champion got the help she needed.
What Not To Do: Don't single thread, and don't forget to test your champion.

130 | 23 | 1 | See full post

Renewals are sales too, often requiring buy-in and multithreading.

Rachel Provan
Customer Success Leadership & Strategy Coach | Founder and CEO @ P...
Visit my website

A renewal is a sale.

It's not automatic.

This is why CS struggles to get buy-in. Others don't understand that everything we do, we are doing in pursuit of a sale.

And it's not as easy a sale as you might think...

Because we don't get to sell the dream anymore. The customer has seen the product - warts and all.

Bottom line, unless it's a multi-year contract, it's not recurring revenue.

We just make it look like it is.

658 | 62 | 19 | See full post

CS teams have to show exactly how they're adding value — while also demanding more power to make commercial decisions.

Markus Rentsch
Helping SaaS companies to deliver, grow, and monetize Customer Value ...
4mo • Edited •

Dear CSMs, none is coming to save you.
It's up to you to demonstrate the value you bring to the company to your leadership.
If you are still talking about internal CSM metrics it's not a surprise that sales will get
➡ all the credit
➡ paid 5x as much
➡ the lion's share of the budget

Stand up for yourself and create a monthly report that outlines
1️⃣ Revenue at risk saved
2️⃣ Churned revenue recovered
3️⃣ Revenue from expansions, up- and cross-sells
4️⃣ Revenue from all kinds of referrals

and share a few stories behind if you get the chance to showcase your capabilities.
It does not even matter whether you've closed any deals yourself.
None of it would happen without customers receiving substantial value.
Stop hiding in the shadows and step into the light.

1,523 79 32 **See full post**

Saahil Karkera
Founder - CS Connect | Customer Success from Seed Stage to Scale | C...
6mo •

Everyone wants CS to be more commercial, except when it comes to

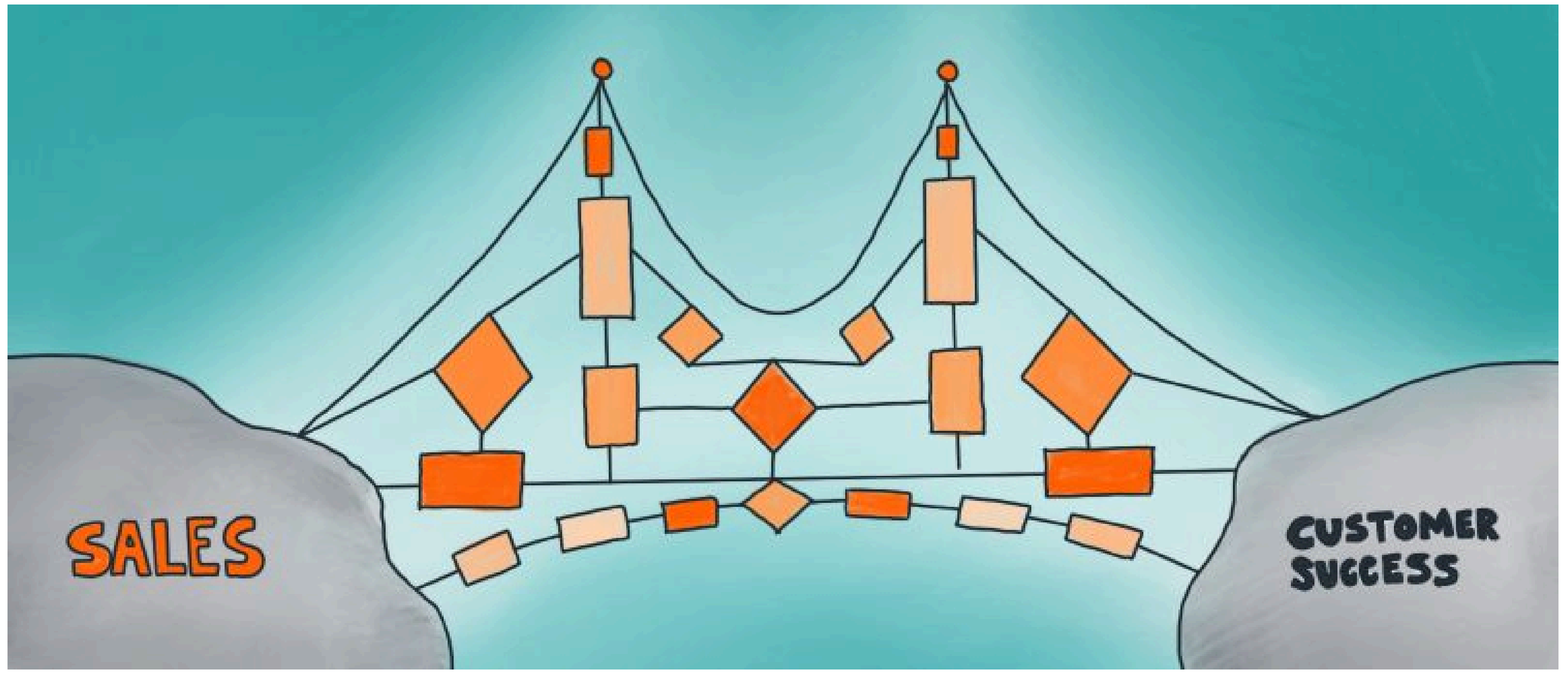
↳ Implementing strict qualification criteria for new customers.
↳ Deciding against upselling underperforming products.
↳ Dropping all non-commercial activities/tasks.
↳ Implementing stricter handoff processes.
↳ Dropping partnerships that don't work.
↳ Investing in tools and training.
↳ Proactively churning a bad fit customer.
↳ Empowering the CS team to veto a bad deal.
↳ Setting limits on support activities they need to do.
↳ Realigning compensation structures to reward CS teams

What did I miss?

Dont expect CS to be commercial only when it suites you.
Being commercial also means giving them the power to make commercial decisions.

273 43 5 **See full post**

There's even a discussion around merging the Sales and CS roles into one.



Jeff Heckler
7x Award Winner | Top 25 CS Influencer - SH | Top 50 CS Strategist - Sm...
View my services

Recently, there has been more discussion around combining the roles of account management and customer success.

One of the supporting statements is that no one is better to buy from (sales, AM/AE) than a trusted advisor (customer success, CSM).

This runs counter to the historical argument that CS needs to stay ambivalent to revenue gains because doing so clouds CS judgment and action, and the customer's trust - which I've never agreed with.

Below is a short list of the benefits and risks.

Combining the roles of Account Managers (AMs) and Customer Success Managers (CSMs) into one:

Benefits:
1. Streamlined communication with clients, offering a single point of contact.
2. Improved understanding of customer needs and challenges.
3. Enhanced ability to identify upsell and cross-sell opportunities.
4. Unified focus on customer success and revenue growth.
5. Reduction in operational costs by consolidating roles.

Risks:
1. Potential overload for the combined role, impacting service quality.
2. Confusion about prioritizing between sales and customer success activities.
3. Risk of diluting the specialized skills unique to each role.
4. Possible conflict of interest, prioritizing revenue over customer success.

Most likely, this combined initiative would reside with a CRO or CCO.

And, of course, the validity for, and effectiveness of, this role would depend on company, stage, product(s), GTM...

120 60 5 See full post

CS is indeed moving toward closer collaboration with other departments, especially sales.

Marija Skobe-Pilley
Fractional Customer Success Leader | Founder @ Women in Customer S...
10mo •

CSMs work with almost every department in the business.

Yet, as a CSM - how much do you actually know and understand those departments?

What about doing a month-to-month plan for discovering your business and getting the needed business acumen?

Understanding in depth how your business works will help you understand your customers, their business and how they serve their customers. 💎

Try learning about all your departments this year.
Individually, or as a team.

What to find out:
💎 goals and targets
💎 challenges
💎 tool stack
💎 collaboration
💎 their impact on your customers

151 20 4 **See full post**

All to create a unified approach to customer insights and deliver a more cohesive experience.

Leslie Venetz
Sales strategy, email copy, repeatable processes & training for B2B orgs ...
3mo •

I call BS. The sales g00r00s who tell you that, as an individual contributor, you should be talking to existing customers are out of their d*mn minds.
No Sales Leader at an org with a CS function would give this advice.
No CS Leader would ever allow sellers to willy-nilly ring an existing customer for a chat.
No Founder would want their sales reps randomly ringing up hard-won customers to "pick their brain."
👉 Here's a better way to capture customer insights without pissing off your CS Team & probably annoying your customers.
I saw this in practice with the *BEST* Head of Success I've worked with👇
- Ask CS to record their QBR & renewal calls.
- Ask the Head of CS to flag 1-2 calls a week that they'd suggest the sales team listen to.
- Encourage the sales team to listen for how the customers are actually using the product and why they renewed.
- Understand if it would be helpful for the seller that closed the deal to be a strategic voice on calls - such as a QBR 1 or a year 1 renewal call.
- Set up quarterly many:1 sessions with your sellers and CS to ensure that sellers have a clear view of the difference between how clients think they will use the product and how they actually use the product + why they renew.

190 162 4 **See full post**

But doing that first requires a clearly defined role and responsibilities for CSM, so they don't get sidetracked.

Aditya Maheshwari

Senior Director of Customer Success at AppsFlyer | Mobile ...

Visit my website

Customer Success is an open-ended role in most organizations.

But if you want your CSMs to truly help customers achieve their goals, the role needs to be more defined. Leaving the role open-ended creates problems. The biggest? CSMs become the go-to for everything that lacks an owner.

To help customers succeed, you need to clearly define the role - Define the job responsibilities. Define the activities. Define where they should spend their time

If you leave CSMs to figure out their own plan, they'll likely get caught up in reactive tasks, in putting out fires and struggle to break free.

What does closed-ended really mean?

It means having clear roles and processes in place for everything that comes their way. This would be ideal. But even 80% clarity in the CS role would make a huge difference.

With clear tasks, CSMs can focus on delivering value without getting sidetracked.

I'm still working on how to make the CS role more defined. It's something I think about every day.

208 43 4 See full post

CS teams need to properly position themselves to set realistic expectations.

Diana De Jesus
General Manager @ Stand The F*ck Out | Founder @ Strategic CS Labs
7mo •

How you introduce yourself as a CSM can set unrealistic expectations.
Here's why:

Intros seem so damn simple and innocent. At first glance, nothing seems off with saying something like:
"Hi, my name is Diana, and I'm your CSM. If you need anything, I'm your go-to person."

But there's a lot that's unclear here and would leave a client feeling confused:

❌ What exactly is a "CSM"?

We all know CS is different from company to company, so what does a CSM do at your company? And we're also assuming here that the stakeholder has worked with a CSM before.

❌ What qualifies as "anything"?

This one here can be incredibly harmful to the relationship.

"Anything" is broad, and because of that, you're putting the responsibility on the client to fill in the blanks about what it means, which results in them making assumptions.

437 52 10 See full post

And not just with the customers, but also with the leadership.

Jan Young, MBA, CSPO, CSM
Putting the C-S in C-Suite! | 2X Top 25 CS Influencer | Top 100 Female B...
3mo • Edited •

Earlier this week, I was coaching a CS leader who just received some jarring news. The Board put a CSM hire on hold and as a result, she will need to become a Player-Coach for a while.

Sounds like a 🚩 moment, right?
Time to dust off the resume! ...Or is it?

In this case, she has support & respect from her VP, Chief Product Officer, & CEO.

Common situation: Their Sales revenue is down, and they are looking to her for guidance on how to build a CS Digital program and drive post-sales revenue.
BUT: They understand that Customer Success is important.

So we set out to identify the:
1. Primary actions Customers need to take to be successful
2. Primary internal actions needed to support Customers' success
3. Opportunities to digitize or automate parts of the Customer Journey
4. Gaps in the product that prevent Customers from self-service
5. Gaps in the Customers' education that prevent self-service

✅ If the Executive Team is on board and supporting the next steps. Great! She can stay and get some interesting work done to show on her resume.

❌ If the Executive Team isn't interested in doing the work to set their Customers up for success, then in my book, that means it's time to move on!

166 59 4 See full post

Daphne Costa Lopes

Global Director of Customer Success @HubSpot | Host @This is Growth ...

Visit my website

Just watched a CSM spend 47 minutes hunting through 5 different systems to prep for ONE customer call.
This is madness.

The journey of a modern Customer Success Manager:
💻 CRM for basic account details
🎫 Ticketing system for support history
📊 Analytics platform for usage data
🛠️ Project management tool for roadmap items
📖 Knowledge base for product updates

All this before saying "Hello, how are you?" to the customer.
Reality check...

That's 47 minutes spent NOT:
❤️ Creating value
❤️ Solving problems
❤️ Growing accounts
❤️ Talking to customers
❤️ Building relationships

But it's got to be done. You can't show up without preparing.
The math is painful:
- 5 calls per day
- 47 minutes prep each
- 235 minutes lost daily
- 19.5 hours weekly
- 78 hours monthly

Just searching for information that should be at our fingertips. 🤯

130 23 1 See full post

Unfortunately, many CSMs are still wasting hours on admin work instead of creating real value for the customers.

Daphne Costa Lopes

Your CSM team should be managing customer success.
Not managing browser tabs.

Such inefficiencies are harming your ARR andoverall business performance but can be easily solved with adoption of Customer Success Platforms.

Irit Eizips
I coach execs on building a CSM Practice
2mo • Edited •

Wait, what?! The absence of automation in CS operations is slowing down my overall business performance?

Absolutely. Let me explain.

In most companies, CSMs still rely heavily on manually compiling customer data (usage, support…) for QBRs and other strategic discussions.

They export the data into spreadsheets, and spend hours piecing it together.

This manual process requires significant time and effort, often at the expense of focusing on higher-value activities like proactive customer engagement and strategic planning.

Without a CSP, CSMs are trapped in the weeds of data gathering and analysis, missing out on the opportunity to spot trends, act on insights, and build deeper relationships with customers.

The cost?

Less time for strategy, more reactive firefighting, and missed opportunities for upsell and renewal optimization.

Many CSMs are feeling the burden of this manual work.

It's like being stuck in first gear when there’s a faster route available.

CEOs need to recognize that implementing a CSP isn’t just about efficiency - it’s about empowering CSMs to focus on what really matters: driving customer success and long-term value.

134 20 6 See full post

That's why more companies are starting to enable their CS teams and drift away the "one-size-fits-all" tactics.

Julie Fox
CS Leader | Top 25 CS Creative Leader + Top 100 CS Strategist x3! | CS ...
5mo •

I have a hypothesis.

Digital CS and Scaled CS as we know it will look WILDLY different within the year.

Digital CS 1.0 (Old Way):
- Do MORE with LESS.
- "Touch" 🤢 low ARR customers more.
- Automate anything that can be automated.
- Leverage Assoc. and Jr. CSMs for lower ARR customers, more tenured and Sr. CSMs for higher ARR customers.

Digital CS 2.0 (New Way):
- Do BETTER with DIFFERENT.
- Measure outcomes and value (not just outputs).
- Enhance Customer Experience for ALL customers.
- Leverage your best CSMs in order to amplify their impact.
- Focus on Impact and Scalability. Focus on CUSTOMERS.

120 33 1 See full post

Stijn Smet 🐳
🏳️‍🌈 | Head of Customer Success @Whale 🐳 | Founder of Customer Succe...
3mo •

I'm sick and tired of people telling me what a good or a bad CSM is. You do you, boo. You're a stellar CSM in my book.

The only thing you should do is stay true to yourself. Be authentic. We promise our clients to be their trusted advisor, their champion, unlocking value. So try stuff, fuck things up, learn from it, and move on.

If tactics that people say are 'bad' or 'worst way of approaching things as a CSM' work for you - they work for you. Again, you do you, boo. I'm sick and tired of what people think an ideal CSM should do. True, we all can make our work lighter and more efficient and be done with redundancy.

However, we aren't living in an ideal world, so we need to play with the cards that are dealt. And if you take the cards and play them in a way that is 100% in your authentic way, it works. Stick to it.

Customer Success is NOT a one-size-fits-all. Yes, we have our core methodology. You need to look at it as a coloring page. But each and everyone has their own box of crayons to color it in. You have the power to find a way of doing Customer Success that works for you.

YOU DO YOU.

298 41 4 See full post

Flowla

Customer Success Equals Business Success

At the same time, more CS leaders start questioning traditional metrics, prioritizing usage, value, and retention scores.

Anita Toth

Hidden Revenue Hunter | Find your first $5K - $50k in hidden revenue wi...

8mo •

It's time to rethink Net Promoter Score (NPS). NPS had its time.

Drawbacks of NPS

Oversimplification

NPS reduces customer feedback to a single number on a scale of 1 to 10. This doesn't capture the complexity and nuances of customer experiences or sentiments.

Lack of context

You can't action NPS feedback because it doesn't provide insights into the reasons behind the score unless you have clean data.

Time-lapse

To get clean data, you need to take samples of the same customer segment consistently and in a standardized way. Without doing this, it's hard to compare and understand what changes worked and why.

Focus on promoters and detractors

By concentrating Promoters and Detractors, NPS lumps a large group of your customers into the Passives category. This vast group of customers is overlooked in the pursuit of paying attention to Detractors and Promoters.

As AI becomes better able to capture complex customer processes, it makes sense to move away from simple, one metric measures like NPS to track customer loyalty.

A single number is easy to understand but lacks context. Like stepping on a scale, you don't know the proportion of your weight as fat, bone and muscle.

Even Fred Reichheld the co-creator of NPS has moved onto Earned Growth Rate as his new metric of choice.

I would love to say I know what the replacement for NPS will be, but I don't.

I created this post to spark a discussion and get people thinking differently.

190 154 7 See full post

Anika Zubair
Award Winning Customer Success Leader | Podcast Host of The Custom...
1mo •

Here’s 1 brutal truth every Customer Success Pro needs to hear ⤵

🚫 Your job isn’t to keep customers happy.
✅ Your role is to ensure customers realize value.

Early in my career, I learned a tough but valuable lesson from a customer.

This was a customer I had weekly calls with, a customer I had built a strong relationship with, and a customer I thought was 'happy'.

BUT, they churned, because they did not see the value. I did not help them see the value.

Here’s what that experience taught me:
↳CS is about driving outcomes
↳A customer will leave if they’re not receiving value.
↳Prioritize business impact in every interaction.
↳ If your customers do not see ROI, they’ll churn.

What I do differently now:
✅ I always connect every discussion to their goals by asking, “How is this moving the needle for you?”

✅ I set clear, measurable milestones so both the customer and I can track progress

✅ I’m not afraid to have difficult conversations when things aren’t working.

Customers may not always be thrilled, but they should always see progress.

337 30 16 See full post

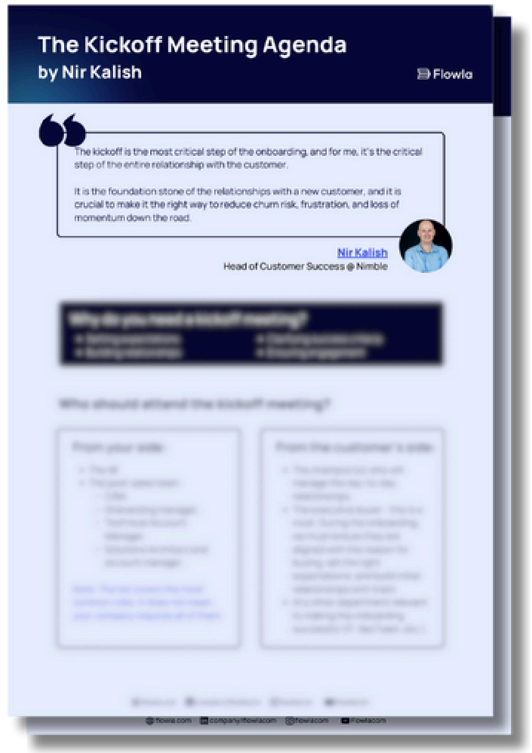
In 2024, CS is about helping customers achieve their goals and grow alongside your business.

Anika Zubair

Customer success isn’t just about keeping customers happy—it’s about ensuring they achieve meaningful, measurable success.

Flowla

Practical bits ⚙


The Kickoff Meeting Agenda
by Nir Kalish
Flowla

The kickoff is the most critical step of the onboarding, and for me, it's the critical step of the entire relationship with the customer.

It is the foundation stone of the relationships with a new customer, and it is crucial to make it the right way to reduce churn risk, frustration, and loss of momentum down the road.

Nir Kalish
Head of Customer Success @ Nimble

The Kickoff Meeting Agenda Template by Nir Kalish

Get a copy


First Value Delivery Cheat Sheet
Onboarding Frameworks by Irit Eizips
Flowla

The two most overlooked aspects of customer onboarding, that are absolutely critical to nail to help reduce customer churn are: First Value Delivered (FVD) and Time to Wow (TTW). Taking the time to bake both aspects into your customer onboarding experience will boost loyalty and Lifetime Value

Irit Eizips
Chief Customer Officer & CEO @ CSM Practice

First Value Delivery Cheat Sheet: Onboarding Frameworks by Irit Eizips

Get a copy

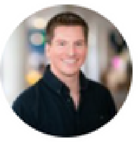
Customer Success Equals Business Success

Reshaping the Way You Lead

As quota attainment remains low, sales leads are on the crossroads. Some are increasing pipeline coverage...

Collin Cadmus

If you can afford to increase pipeline coverage, do it. Otherwise a reduction in quota might be the wisest investment you make.
The only alternative is spending a fortune to hire more salespeople and hoping for different results.



Collin Cadmus
5x Sales Leader / 2 Exits / VP Sales / CRO / Consultant / Advisor / Coach ...
4mo •

Industry average quota attainment is down below 40%. Many SaaS companies are choosing to reduce quota. They acknowledge that firing and hiring salespeople doesn't equal growth. They realize cycling in new sales leaders doesn't change much. It actually slows growth and costs a lot of time and money. They realize how costly it is having a miserable sales team. Which leads to the notion that the sales team needs to be replaced.

But what if there's another way?

There is and that's what Salesforce is doing. Instead of lowering quota, they're increasing pipeline coverage from 2x to 3x.

Instead of reducing expectations for the salespeople they're aiming for providing more pipeline to adapt to the change in deal cycles, sizes, and win rates.
They're also adding more enablement, training, and AI resources. This means even the largest of SaaS companies are accepting that former trends and cookie-cutter growth projections no longer apply.

Many companies will remain in denial about these changes. But those who plan to survive long-term are accepting reality. If you can afford to increase pipeline coverage, do it.

1,909 188 41 See full post

Nate Nasralla
Co-Founder @ Fluint | Writing about selling *with* your buyers, not to th...
5mo •

It's wild how many sales teams still rely on the "3X pipeline coverage" idea.

Even though reps building 3-4X coverage AND missing quota happens more frequently than Taylor Swift concerts selling out.

For some teams this'll feel a little too "101-level," but that's also my point — it's known, but so rarely done well.

So at the risk of oversimplifying this topic, there are 2 types of teams:

- Type 1: Wins by "volume."

Close rates hover ~20%. Leadership's hammering prospecting to make sure reps "get after it." Always feeling like pipe coverage is too light.

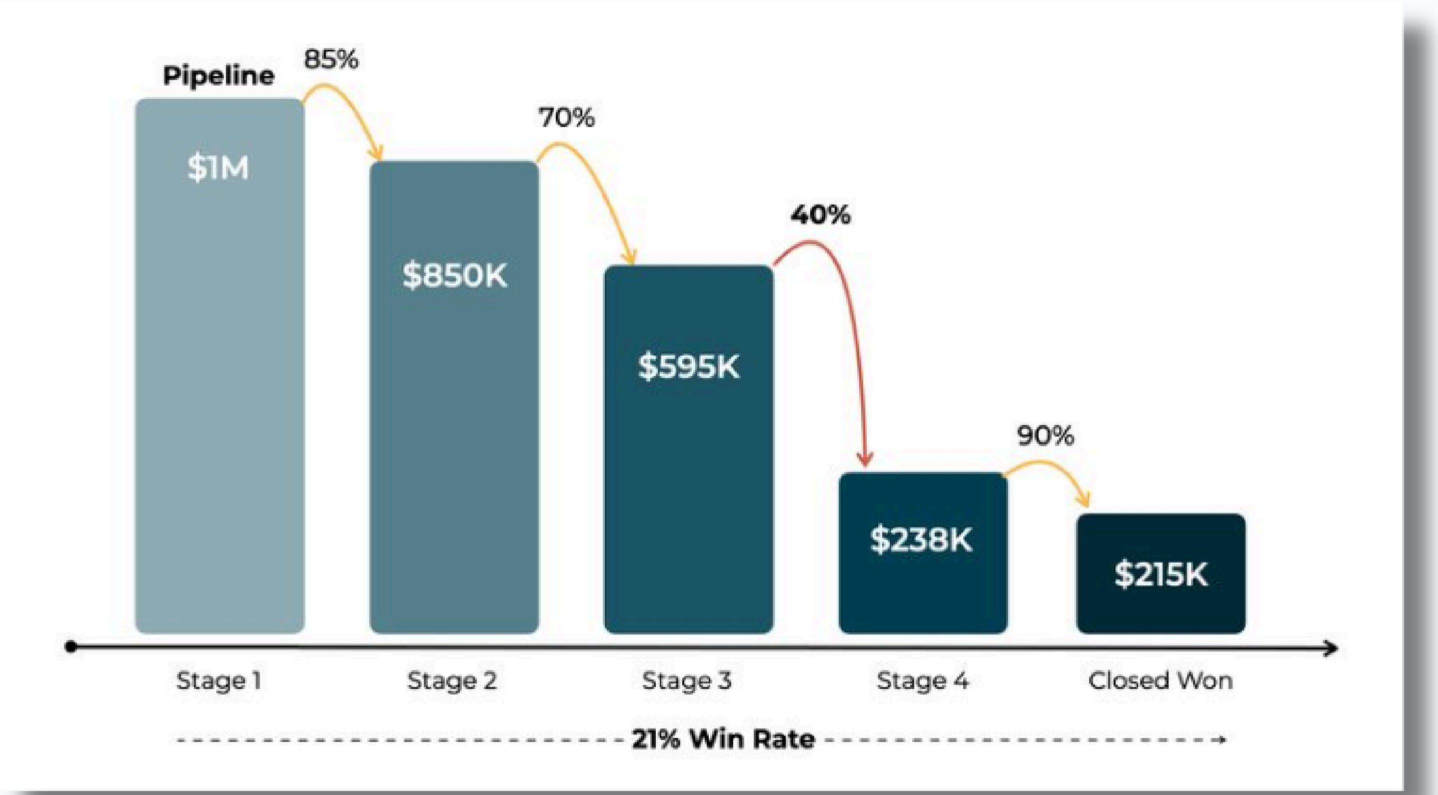
- Type 2: Wins by "rate."

Process broken down by stage, measured weekly/monthly, targeted programming rolled out based on leaks to win more — with less pipe.

→ The 1st type of team wins by "force, the 2nd wins with "finesse."

697 106 20 See full post

Others criticie this approach and suggest '**going upstream**' and enabling reps.



Flowla

Reshaping the Way You Lead

Regardless, we need to rethink how we measure sales performance, moving away from inflated activity metrics.

Brandon Fluharty

I help strategic SaaS sellers become millionaires using design & systems...

View my newsletter

Sales leaders need to put an end to this MADNESS. Here's a strategic seller who was put on a PIP after hitting 166% of his $1.2M quota because he didn't hit the required "activity metrics." There's a better way to lead:

It's simple...

Stop treating knowledge professionals like factory workers.

Specialized knowledge, building networks, and embracing tech innovation are more important growth levers than measuring activity inputs.

This is especially true for strategic sellers.

If you're leading sellers who have to engage with multiple executives at large companies and you're scrutinizing their "activity metrics," I suggest you do an audit of your management style.

730 154 24 See full post

Sam Kuehnle

VP Marketing at Loxo, the #1 Talent Intelligence Platform and global lead...

View my newsletter

Years ago, I was sitting in a quarterly business review. The VP of Sales shared we missed the revenue goal. 5 minutes later, the CMO shared that we hit our "lead goal" the past 3 quarters. The CEO asked, "What happened?"

Real talk: what happened is that metrics became goals, and the team focused on hitting those "goals" without keeping the ACTUAL goal in mind

A goal is a desired outcome you're looking to achieve
A metric is an indicator that determines your progress toward a goal

Metrics inform if you're on track to achieving a goal and should not be set as goals themselves

When you make a metric a "goal", you shift the focus from the original goal to the "metric goal". As a result, the likelihood of missing the original increases as how you optimize towards the metric, not the goal.

873 160 32 See full post

Volume-based, activity-focused mindset isn't always the right fit for increasingly lean sales teams...

...especially in startups.

Florin Tatulea
Sales Leader | LinkedIn Top Voice | GTM Advisor
Visit my website

I think the days of 50-100 person+ sales teams to get to $100M ARR are gone.
I've noticed a shift in my own thinking as well.
I used to want to be a CRO of a huge company, but managing a huge team is no longer a main priority.
Now I want to see if I can build a business with as little sales people as possible.
5-10 reps at $100M ARR?
I think it'll become the norm.
Kyle Coleman recently just hired for a role that I believe is going to become MUCH more in demand.
Head of Pipeline Strategy
It's a combination of Demand Gen, ABM, Operations, SDR, and Sales Programs.
"One subject matter expert well versed in all things pipeline creation and conversion. A systems thinker with the curiosity and drive to put AI to work. Entirely focused on generating as much qualified, high-velocity pipeline as possible."

583 | 117 | 2 | See full post

Adam Jay
Fractional CRO, GTM Advisor, Operator | CEOs call me when they want t...
Visit my website

Founders: Stop hiring talent from those big company names to scale your startup!
These "rockstars" will likely fail at your startup. Here's why:
Big company sales are easy mode. Everyone knows FamousCompany. MegaCorp is a household brand. GoliathInc gets VIP treatment wherever they go. These "stars" coasted on their employers' brand recognition and relationships.
Startup selling is hard mode. No one knows who you are. You have to educate buyers on the problem you solve. Crafting a new market category requires resilience and creativity. BigCo reps succeeded by following the playbook. They lack the grit required to blaze new trails.
Don't hire the easy way out. Seek reps who know how to hustle in the mud. Look for resourcefulness, determination, and vision. Prior startup experience is invaluable. Bring on reps who can handle ambiguity and build something from nothing.
To scale revenue, hire reps ready to roll up their sleeves. Those who can (and have) built a repeatable process. Evangelists who spread your gospel with passion. Scrappy go-getters unfazed by startup chaos. Those who can truly help bridge the GTM Gap™.
Sell like a startup, not a Fortune 500. Embrace the grind.

461 | 155 | 15 | See full post

Setting realistic quotas should be based on math.

Kevin "KD" Dorsey
CRO at finally - Founder of Sales Leadership Accelerator - The #1 Sales ...
Visit my website

Quotas should be based on math.You should be able to mathematically show people how to get to their number
Here's what your close rate needs to be.
Here's what you deal size needs to be.
Here's what activity should look like to create the number of opportunities you need.
Here's how you over perform.
Here's what will get you under performance.
It still shocks me how often I keep hearing of quotas going up with no math to back it.
Increasing quotas does not guarantee an increase in revenue.
IN FACT.
I have lowered quotas and watched revenue go UP!
Why?
Believability.
When people believe they can hit something the odds and behavior go up.
When people don't think they can hit something.
Learned helplessness sets in.
Math teat your quotas
Build plans to get there.
Execute.

1,517 · 227 · 31 · See full post

Even if you have to make them more aggressive.

Sam Jacobs
CEO @ Pavilion | Co-Host of Topline Podcast | WSJ Best Selling Author o...
Visit my website

If you're a high-growth GTM executive and you saw decent growth in 2024, be careful. Your CEO and CFO are going to try and move your 2025 goalposts back to 2021 levels.
When they do, they will be re-introducing pain and anxiety into the organization.
So what should your 2025 targets be?
The long answer is based on math
The short answer is: "More aggressive than 2024 but still attainable."
If your CEO and CFO are not imposing a mirage on you, but are coming to you and asking you what the target should be, it's pretty simple.
Extend your Trailing 90 Day performance through the next 12 months.
If you have seasonality, take the past 12 months and make it 15% better.
BOTTOM LINE:
If you finally have a little bit of momentum, don't screw it up.
Don't immediately push your business over its skis and start contorting the growth motion.
Keep hitting your targets. Ratchet them up slightly. And keep pushing.
Enjoy the feeling of winning.

376 · 42 · 9 · See full post

What’s expected from leaders is changing too as many CEOs are looking for a **hands-on attitude** in leadership hires, often prioritizing this over years of experience or college degrees.

📈 **Jeremey Donovan**
EVP, Revenue Operations (RevOps) and Strategy @ Insight Partners
View my blog

Hey Salespeople: Noticing a major shift in what CEOs are looking for in CROs / VPs of Sales...

... Specifically, rolling up their sleeves by getting out into the field and engaging on deals has gone from a mostly nice-to-have to mostly need-to-have.

What's old is new again.

463 60 2 See full post

🏄 **Scott Leese**
Fractional CRO + GTM Advisor | 12 🦄s | 11 exits | 6x Sales L...
Visit my website

Just spoke to someone looking for a VP Sales who insists candidates have 10+ yrs of leadership experience.

I got my first VP Sales gig when I had 3 yrs of experience.

I cannot fathom what my life and career would have been like had I needed to wait an additional 7 yrs.

Can we agree that:

- “X" yrs exp is overrated.
- Not every year is created equally.
- Industry experience is vastly over-indexed.
- Mandatory college degrees in sales are unnecessary.

There is always nuance and always those who break the old mold entirely.

Evolve your thinking and open possibilities.

897 187 9 See full post

Moving Forward: 2025 Predictions

2025 will be the resurgence of cold calling as people realise its the easiest way to actually speak to your prospects and stand out.

Matthew Putnam

I would say that more than ever, companies need to interview their customers, use AI to analyze the insights, craft the messaging based on those insights, and use AI again to analyze the messaging to make sure they nail it.

Mafalda Johannsen

AI is the biggest trend. I think we will see a jump above just creating summaries but AI tools that will analyze customers behavior, engagement, assess risk and even create new product capabilities such as integrations.

Nir Kalish

In the last two years AI been used to send thousands of emails a week across 10+ inboxes - and now we're experiencing "the great ignore". Now even the most personalised outreach has a hard time getting read.

I see buyers turning more towards their peers in communities to get answers instead of talking to Sales. Places where outreach is frowned upon, but enablement is welcomed. Companies who invest in materials that are actionable and easily shareable will have the advantage.

Viktor Hatfaludi

In 2025, sales enablement will be all about using AI to personalize everything, working closely with other departments to ensure alignment, focusing on customer success to shift to true revenue enablement, creating interactive content in the flow of work, and keeping that human touch with empathy-driven coaching!

Steffaney Zohrabyan

Making ROI visible never goes out of style and is a safe bet for Customer Success well into the future. Tactical conversations with users to understand how they're getting value from the product. Strategic conversations with decision-makers to ensure they see that value, as far up the chain as possible.

Jean-Pierre Frost

With businesses reducing and controlling expenses, Sales people will have to focus on mastering the foundations of their role with a perfect execution to be able to prove value to their customers and win deals. Personalised and carefully crafted strategies will be key to success in 2025.

Céciline Stadelmann

2025 will see a real push and drive for customer-led growth in the B2B SaaS world, fuelled by the continued developments in AI. We'll see the creation of more specialised roles - focused on accelerating value delivery - and enhanced AI powered personalisation that will enable businesses to deliver tailored, value driven interactions at an unprecedented scale.
Sales and customer success teams that embrace these technologies to build emotional connections and trusted partnerships, and who align well with buyer preferences will succeed. Seamless digital interactions and services, will replace outdated broken processes and combined with personalisation and authenticity, this will define the next wave of sustainable, long-term customer relationships.

Jason Noble

In 2024, Customer Success teams embraced revenue as part of their overall goals and KPIs. This is crucial because revenue is the metric that senior leadership understands and values more than any other. And despite the debate about “owning a number,” CSMs are uniquely positioned to advise and guide customers on how to grow with your solution.
I sincerely hope this trend continues into 2025 and beyond!

Cinthia Silva

2025 will be a year of return to growth, but with an eye on profitability. AI will continue to feature strongly, and more specific use cases for it will begin to emerge.

Doron Luder

I believe from top-of-the-funnel things will change. There is a lot of noise in the space, therefore generating new leads will come from more "friendly sources" like partners, recommendations, referrals and networking. Having a social presence and personal brand will make a huge difference in credibility for outreach. The volume can be less but the quality will be higher. Upsell and cross-selling is still growing. Salespeople will need to be more strategic when it comes to outreach.

Live data will be helpful to detetct needs sooner and react even faster. IA tools like Gong etc... can analyze conversations and detect leads / insights for the sales team to follow-up.

Hybrid selling between AI & reps will become more common without the prospect noticing. With the growth of Product-led growth, the reps will be less needed in the sales process and some of the stages of the sales process will be managed by AI.

Also, value selling will start switching towards solution selling. It's not about "creating the need" but more around "finding the undercovered pain" of a prospect to be able to sell to them. Nothing new here, however we will need to develop new types of discovery process and communication styles to get to the root of their pain points and match it with our product, as most of the superficial information will be encountered by AI.

Maude Simon

With 2025 on the horizon, we're entering the age of autonomous agents and the dawn of a new era for customer success. Agents will seamlessly augment our teams, autonomously handling everything from meeting preparation and status assessments to trend analysis and churn prediction. The result? Customer success teams empowered with unprecedented insights and foresight, allowing them to focus on what truly matters: building lasting relationships and driving value for their customers.

These agents will independently gather critical information, prepare for meetings, and provide customer success professionals with actionable insights. This proactive support will set a new standard for customer engagement, enabling teams to navigate complex challenges with greater agility and precision, looking at data, trends and coming up with creating ways to identify challenges and tackle solutions. The future is agentic for customer success, and agents will be the synthetic workforce at the forefront of this transformation.

Marco Carrubba

Human-centric selling in 2025 builds on the idea that AI will handle much of the administrative burden, freeing salespeople to focus on building trust and forming deeper human connections.

In 2025, a significant milestone will be crossed, with over 50% of sales teams in the US and Europe integrating AI tools into their workflows. AI will automate repetitive tasks, such as data entry, lead scoring, and basic outreach, freeing up time for sales teams (SDRs and AEs) to engage more meaningfully with their prospects and pipeline.

I see a world where rep-enablement will shift its focus too. Teams will spend more time mastering human psychology; active listening, social awareness, emotional literacy, and behavioural triggers—skills that enhance emotional intelligence and deepen buyer relationships.

Mike Hamberg

🔮 My boldest Customer Success predictions for 2025.
The industry is about to hit an inflexion point. Here's what's coming:

1️⃣ The Great Tool Consolidation 🛠️
The CS Tech stack is 14 tools strong. That's 13 too many. By 2025: All-in-one platforms will dominate. Standalone tools will either evolve or die. Teams that move fast and consolidate early will win.

2️⃣ AI Beyond the Hype 🤖
Not just chatbots, but:
- Predictive health scoring
- Proactive early churn prevention
- CS Co-Pilots to improve the CS process
The teams that master this will 3X their impact.

3️⃣ CS + Marketing Revolution 🚀
The wall between CS and Marketing will crumble:
- Tailored journeys using content
- Customer advocacy programs
- Joint expansion campaigns
- Shared success metrics

4️⃣ Rise of the Technical CSM 💻
Customers expect more from their CSMs:
- Use-Case expertise > relationship management
- Roles will require more technical savviness
- Ecosystem fluency will be an accelerator

Adapt or continue to see customers disengaging. The winners of 2025 will be:
🏆 Tech-savvy teams
🏆 The early AI adopters
🏆 Cross-functional collaborators
🏆 Data-driven decision-makers
The losers? Those still doing "check-in calls" and manual QBRs.

Daphne Costa Lopes 

Bonus:

Top Trending Tools of 2024

clay

attio

WINN AI

sybill

Attention

RB2B

instantly

dimmo

Common Room

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