# Unlocking Revenue Growth
# The Power of Structure in the Messy Middle

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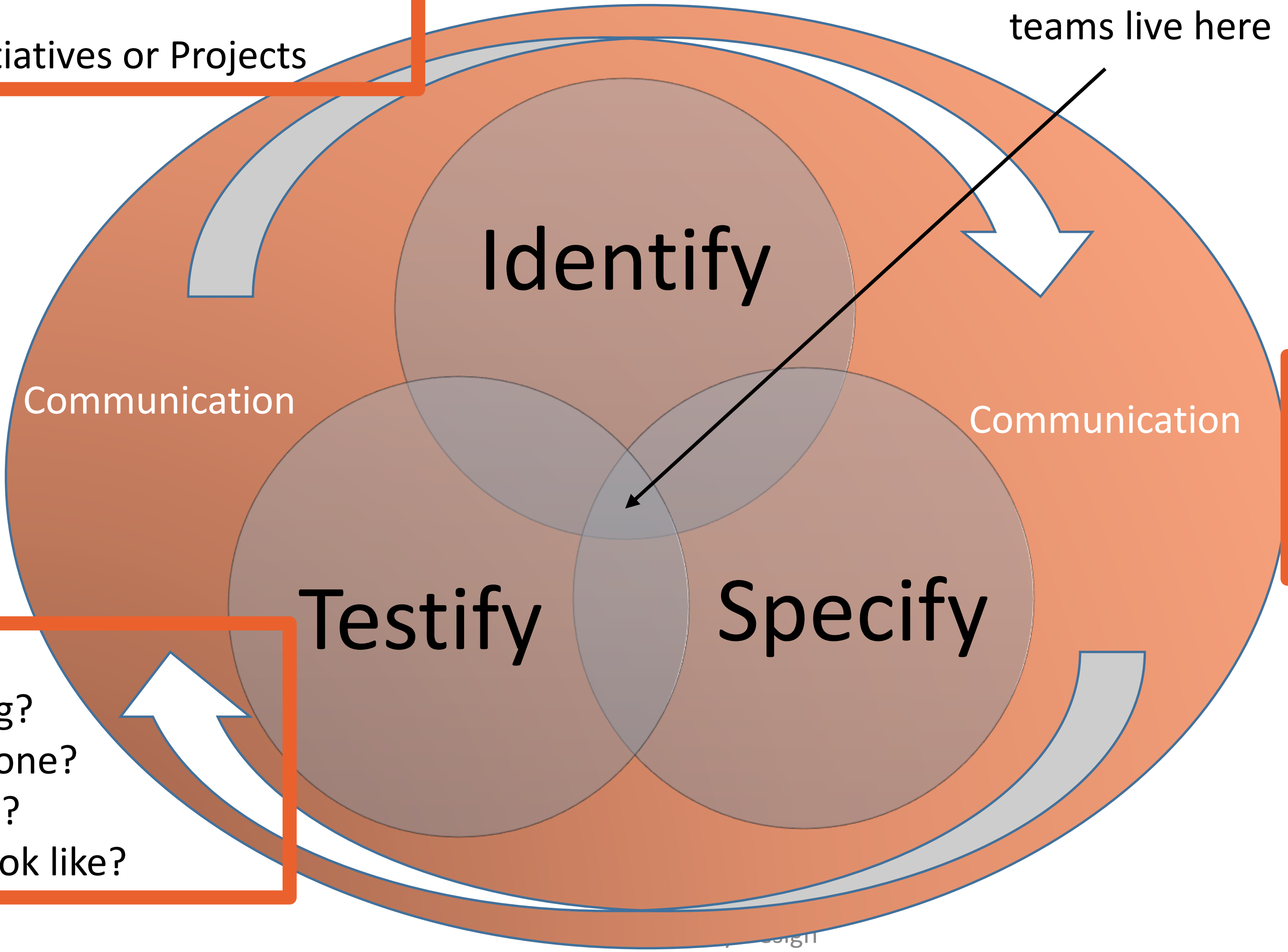
# Overview

**Identify:**
Your top 3 Initiatives or Projects

High performing
teams live here




**Specify:**
Where are you starting?
Where are you going?
What’s needed to get there?

**Testify:**
When are you starting?
What are your milestone?
When are you ending?
What does success look like?

# 1. The BIG IDEA

1. It’s easy to start
2. It’s easy to finish
3. It’s HARD when you’re in the middle:
   1. to maintain
   2. to keep going
   3. to sometimes know the Next Step

The A-HA:
When you’re in the Messy Middle, identify the First Step AND take it

# 2. The Facts

1. Our world has changed
2. Our buyer has changed
3. Our world moves at the speed of now
4. Technology isn't adopted properly
5. Budgets are tight
6. Accountability is becoming a thing (finally)
7. It's VERY NOISY out there!

The future of B2B sales is hybrid | McKinsey

# 3.Identify

The Messy Middle is the part of our project that stalls due to lack of clarity, structure, process, or identified next step.

Starting is easy. Ending is easy. The middle is where details matter in order to move forward step by step.

**The A-HA:**
We solve for the Messy Middle by starting with the end in mind, taking inventory, following the three-step process of Identify, Specify, and Testify.

# 3.Identify

**Purpose:** We all want to be successful. In order to be successful, we need to first understand where we are and where we desire to go.

Having this understanding allows us to take inventory and identify what people, processes, tools, and technology is in place today. Too often, we start a project or initiative, and we already have something in place!

When we identify potential projects and initiatives, it grounds us, it gives us and our team focus. We must also tie our identified projects and initiatives to where we (and our team) are at the moment.

**The A-HA:**
Identify the SHARED & DESIRED VISION

# 3.Identify – Checklist and Examples

**What's needed to begin:**

**A checklist! Gather your thoughts and people and take stock.**

Below is an example list well as questions to ask ourselves and our team.

**Let's look at our current Initiatives*:**

1. Grow Revenue
2. Hire X Roles
3. Take our new product/service to market
4. Decrease customer churn
5. Increase Operational Efficiencies

**fill in the initiatives for your company here*

**Let's look at questions to ask ourselves as a team*:**

1. Do we have the infrastructure to do this effectively? People, Process, Technology?
2. Do we have an ideal candidate profile, recruiting, interviewing, hiring, and onboarding strategy?
3. Do we have a Sales Ready Program in place to make the new launch successful?
4. Do we have a comprehensive Customer Onboarding and Success Strategy?

Identify Specify Testify

# 3.Identify – Strategic Guide

**List our Initiatives/Projects**

Annual Projects

Quarterly Projects

**Instructions:** Schedule your planning meeting(s), assign a scribe, and start listing out the projects. Then dive into the questions that need to be asked.

**Let's look at questions to ask ourselves as a team*:**

1. Why are we doing this project?
2. What is the purpose of this project?
3. Who is responsible for this initiative?
4. Who does this initiative impact?
5. Is there overlap with another initiative?
6. Do we already have something in place?

**what other questions needs to be answered?*

# 4. Specify

**Purpose: Details Matter. We can't win if we don't keep score. And we can't measure how far we've COME if we don't know where we STARTED.**

Ambiguity is the death of all things good. The kinda, sorta, maybe's, it depends answers to questions leave us in limbo. Not only do we not like that feeling, but science also tells us our brains will fill in the blanks and make assumptions. And we know assumptions aren't always a good thing.

**The A-HA:**

Adding specifics and details to our initiatives, gives each person involved in the project more detail and insight. Wisdom tells us to count the cost before we say YES to something. By adding specifics, we're also able to prioritize and check to see what we have already before starting something new.

# 4. Specify – Checklist and Examples

**What's needed to begin:**

**A checklist! Gather your thoughts and people and take stock.**

Below is an example list as well as questions to ask ourselves and our team.

**Let's look at our current Initiatives*:**

1. Grow Revenue – example
2. Initiative #2
3. Initiative #3

**pull initiatives forward from the Identify exercise*

**What do we have/know/do already to accomplish our initiative #1:**

1. How much do we want our revenue to grow?
2. Where were we successful last year? Why?
3. Which segment are we going after? Why?
4. What metrics will we use for KPI's and Metrics:
5. KPI's: Wins/Losses; TAM Growth; Progress to Revenue Attainment
6. Metrics: Sequence Metrics (when a customer responds); what content is performing; which questions perform the best; which VP resonates the most; buying journey alignment; activity metrics

# 4. Specify – Strategic Guide

**List our Initiatives/Projects**

Annual Projects

Quarterly Projects

**The A-HA**
Specify the SHARED and DESIRED OUTCOME

**Let's look at questions to ask ourselves as a team*:**
Bring the answers forward from Step 1. Layer in the following:

1. How would we rank our initiatives? What priority order would we put them in?
2. Who will support the ongoing maintenance of this project?
3. Who will need training on this project?
4. What is the long term (12+months) of this project?
5. When will this project start and end?
6. How will this initiative be communicated?
7. How will this initiative be rolled out, implemented and adopted?
8. How will we know if this initiative is successful?
9. Where is the budget coming from for this project?
10. What reports are needed? And who needs them?

**fill in the initiatives for your company here*

# 5. Testify

**Purpose: Sometimes the hardest thing to do is START.**

FEAR can keep us from starting. From picking up the phone to sending that email to posting on our socials to asking questions. Here's what FEAR stands for:

F = False
E = Evidence
A= Appearing
R = Real

The A-HA Moment

Keep that in mind and drown out fear with CONFIDENCE. Confidence that people need your solution. Maybe not right now, but if we get our targets right, at some point they will need our services.

Also keep in mind, most of us want to say yes. Part of executing well is making it easy for people to say yes to our offer, our product, our service. That happens when we're prepared, when we know our audience, when we're Deliberate and Intentional with our efforts.

# 5. Testify – Checklist and Examples

**What's needed to begin:**

**A checklist and count down! Gather your people and LAUNCH!**

Below is a list of ingredients needed to begin as well as questions to ask ourselves and our team.

**Let's look at our current Initiatives*:**

1. Grow Revenue
2. Initiative #2
3. Initiative #3

**What do we have/know/do already:**

1. What is our start date?
2. What is our end date?
3. What is our Rhythm for check ins again milestone?
   1. These are our KPI's/Metrics from Specify
   2. What STORY is our data telling? Where are we successful?
   3. Press into more of what works
4. At the end of our Initiative, dive into
   1. What went well
   2. What didn't
   3. What did we learn
   4. What's next

**fill in the initiatives for your company here*

# 5. Testify – Strategic Guide

**List our Initiatives/Projects***

Annual Projects

Quarterly Projects

**Let's look at questions to ask ourselves as a team*:**

Bring in the answers from Steps 1 and 2 and layer in:

1. Identify the owners and facilitators of the initiative
2. Put the meetings from the identified communication rhythm on the calendar OR make sure to add the appropriate agenda items to existing meetings
3. Create the needed reports in your tools
4. HOLD A KICK-OFF Meeting for the initiative.
5. Send out updates daily/weekly/monthly

**The A-HA**

HOLD A KICK-OFF Meeting to drive alignment

**fill in the initiatives for your company here*

# 6. Creating an implementation & adoption plan

**Best Practices:**

1. Create a T-Minus Calendar for each initiative
2. Create an overall Project Calendar for each initiative
3. Include a kick-off meeting for each initiative
4. Hold your progress meetings
5. Hold your Wrap Up Meeting for the initiative

**The A-HA**
Deadlines create urgency!

**Kick-off Meeting agenda example:**
HOLD A KICK-OFF Meeting for the initiative. This meeting is critical and focused SOLELY on the initiative. Here's the example agenda:

1. **Purpose:** Initiative #X; be sure to call out the WHY
2. **Who:** Highlight the team and their responsibilities
3. **What:** Walk through each piece of the program separately and include WHY it exists as well as HOW to use it. Meaning, if you're rolling out a new sequence, get SPECIFIC on how your team is to USE that sequence as well as what the REPORTING means.

# 7.More examples

**Identifying Key Components for your Interviewing and Hiring Program:**

1. How would we describe our culture?
2. What makes people successful here?
3. How would we describe our clients?
4. What hard/soft skills are we looking for in our teammates?
5. Who should interview? Why?
6. How many steps is our interviewing process? Define a go/no-go decision
7. If it's a go, do we have our Hiring Program in place?

**The A-HA**
If we can't name it, we can't tame it!

**Identifying areas to drive Operational Efficiencies:**

1. What are we trying to accomplish?
2. See steps 1 and 2, Identify and Specify
3. Do we have something in place already?
4. Do we know enough about our process/tech stack?
5. If not, identify our Purpose of the initiative and who can help us solve.
6. Schedule time internally or externally with appropriate partis to get answers
7. Identify the best solution
8. Create the execution plan

# Appendix - Worksheets

Current Infrastructure Worksheets, Leadership Benchmark Worksheet, RbD Annual Planning Worksheet, Rays of Revenue worksheet

# 7. More Examples

# Benchmark your current infrastructure

| | Today 1-10 | Goal 1-10 |
|---|---|---|
| **Your Team's Goals**<br>*How well are they known and understood? Are the goals aligned with the company's goals?* | | |
| **Your Team's Purpose**<br>*Does everybody know the purpose? Does everybody know which hill they're taking on any day? Is it aligned with the company's Mission & Vision?* | | |
| **Effective Onboarding**<br>*Are your people able to sell more quickly? Are they made to feel welcome? Are the basics covered? Does your onboarding include some Sales Best Practices? Does your onboarding include training on your systems and tech?* | | |
| **Effective Sales Training**<br>*This is NOT product training. This is ultimately the "how" of how your product/service is sold. Are your reps trained on Sales 101 blocking and tackling, overcoming objections, pre-call planning, value proposition statements. If so, how well?* | | |
| **Sales Manager 101**<br>*Contrary to popular myth, your best sales rep does not always make your best leader. What does your ideal leader profile look like? Yes, we want them to be able to sell, but we also want them to be able to lead. Is this person able to lead by example, inspire, remove barriers, hold effective 1:1's, communicate up the chain effectively, and keep the team focused? (Among probably a dozen other tasks.)* | | |
| **Coaching & Motivating your Reps**<br>*Some say, "I shouldn't have to motivate my reps", and there's a part of that statement that is true. However, coaching works and the byproduct of a good coach and/or coaching sessions is the reps feel more motivated afterwards. What do your 1:1's look like? Are they inspiring or beat down's? (See employee engagement stats.)* | | |
| **Reporting Do's and Don'ts's**<br>*For the love of God, please stop measuring every little thing. Just because we can, doesn't mean we should. Are your KPI's clearly defined? These should be the vital stats of your organization. Yes, if those vital stats go red, dig deeper. However, until then, information overload slows down the team, produces a nit-picking feeling, and may overall demotivate. Is success clearly defined for your team? Do they know what it is? Can they see it? Touch it? Articulate it?* | | |

7. More Examples

# Benchmark your current leadership efforts

**Part II – Leadership Traits**

| The Trait | Today 1-10 | Goal 1-10 |
|---|---|---|
| **What it's All About**<br>*It's not about you. Why did you become a leader? How would you describe your leadership style? Who's on your advisory team? How do you hold yourself accountable?* | | |
| **Perspective**<br>*Does your team have a (1) Goal, (2) Purpose, (3) Perspective, (4) Clarity, and a clear path to (5) Execute? If not, what's your plan to put these pillars in place? If yes, which one area or areas need to be shored up to make your team more effective. The outcome of having these five areas defined and enforced is to allow your team to MOVE with less friction.* | | |
| **A Functioning System**<br>*See the worksheet above regarding your overall system and processes in place. How well does your system work? What areas would you need to focus on to make your system more effective? The purpose of a functioning system is to provide the opportunity for all on the team to be successful. The system is essentially the lines on the road for your team to follow.* | | |
| **Self-Awareness**<br>*Are you a Thinker, Feeler, or Doer? What are the three words you'd use to describe yourself? Your leadership style? Are you walking the walk and talking the talk? Do you have a coach?* | | |
| **Ability to Harness and Use Resources**<br>*Who's at your table? Do you take the time to figure out what motivates your people? What matter to them? How about the rest of the organization? Being able to know and understand what makes people, departments, etc. tick drives alignment and allows for stuff to get done and removes obstacles (both perceived and real).* | | |

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# My Annual Plan ____________ *year*

## Step 1

### What went well last year?

Personal

Professional

### What do I need to keep doing?

Personal

Professional

### What do I need to stop doing?

Personal

Professional

### What do I need to let go of?

### What am I grateful for?

*(people, moments. groups, ect.)*

### What is this year's theme?

### What do I want to accomplish this year?

Small

Medium

Scary

### What actions MUST I take to accomplish my goals?

Small

Medium

Scary



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# My Annual Plan ____________ year

## Step 2

| What I am good at: | What I like to do: |
|---|---|
| | |
| **Personal and professional goals:** | **What I would tell my younger self:** |
| | |



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# My Annual Plan ________________
*year*

## Step 3

Rules of engagement: No more then 3 milestones per quarter. Actions must be associated.

| QUARTER 1 | | QUARTER 2 | |
|---|---|---|---|
| Milestone | Action | Milestone | Action |
| | | | |

| QUARTER 3 | | QUARTER 4 | |
|---|---|---|---|
| Milestone | Action | Milestone | Action |
| | | | |



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And plot it all out and share for visibility

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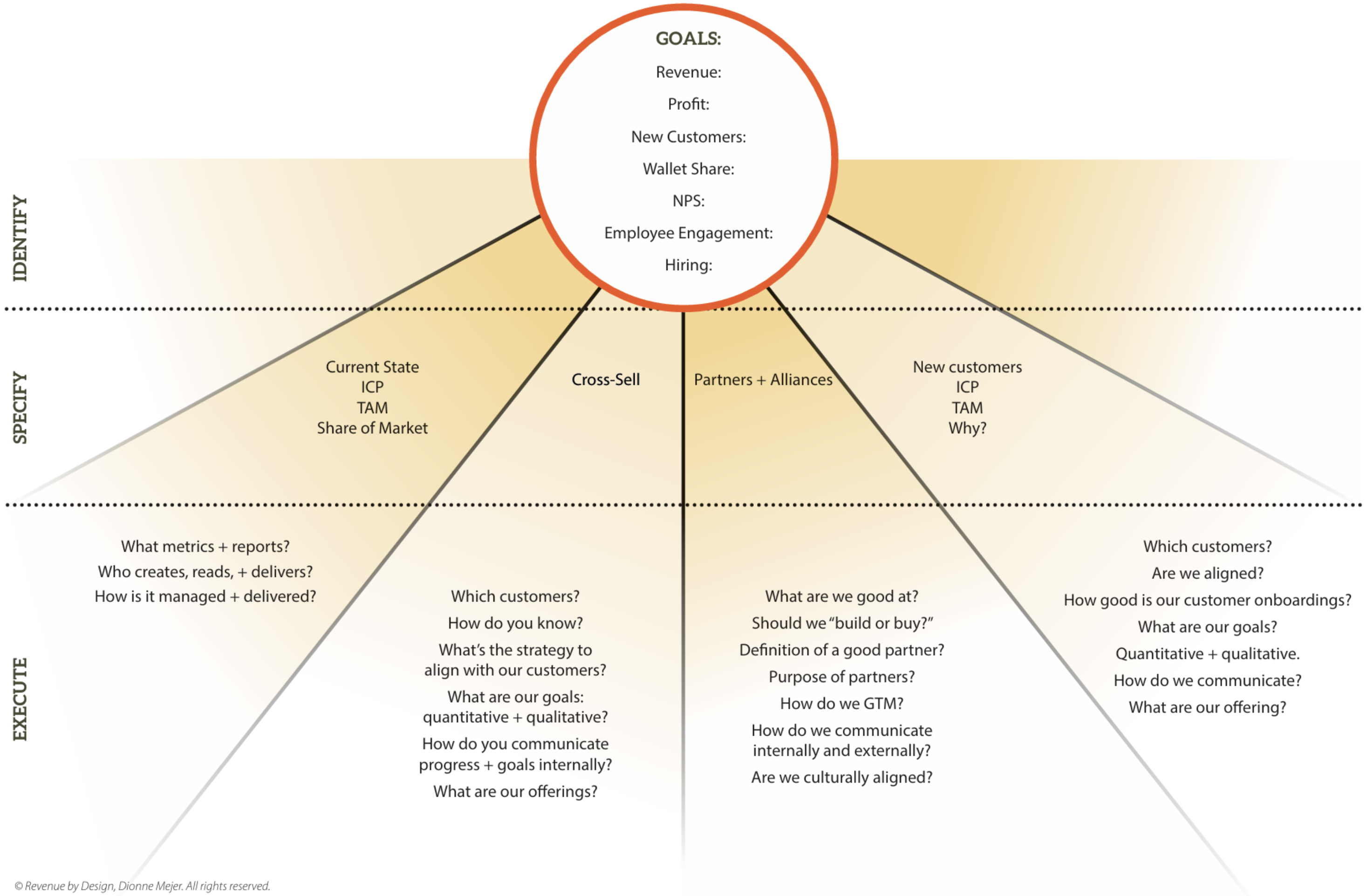
# Rays of Revenue

Example



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# Rays of Revenue

**GOALS:**

Revenue:

Profit:

New Customers:

Wallet Share:

NPS:

Employee Engagement:

Hiring:

IDENTIFY

SPECIFY

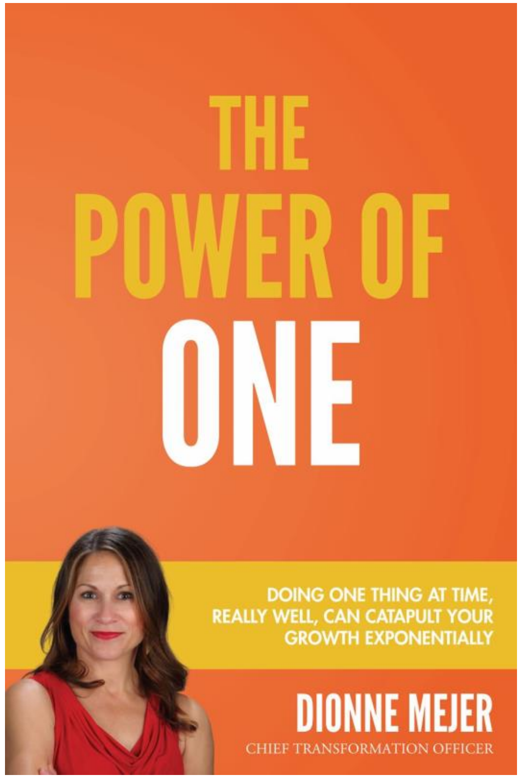
EXECUTE

Get the free eBook; The Power of One

# Next Steps

Join our Executive Peer Group in person or Virtual

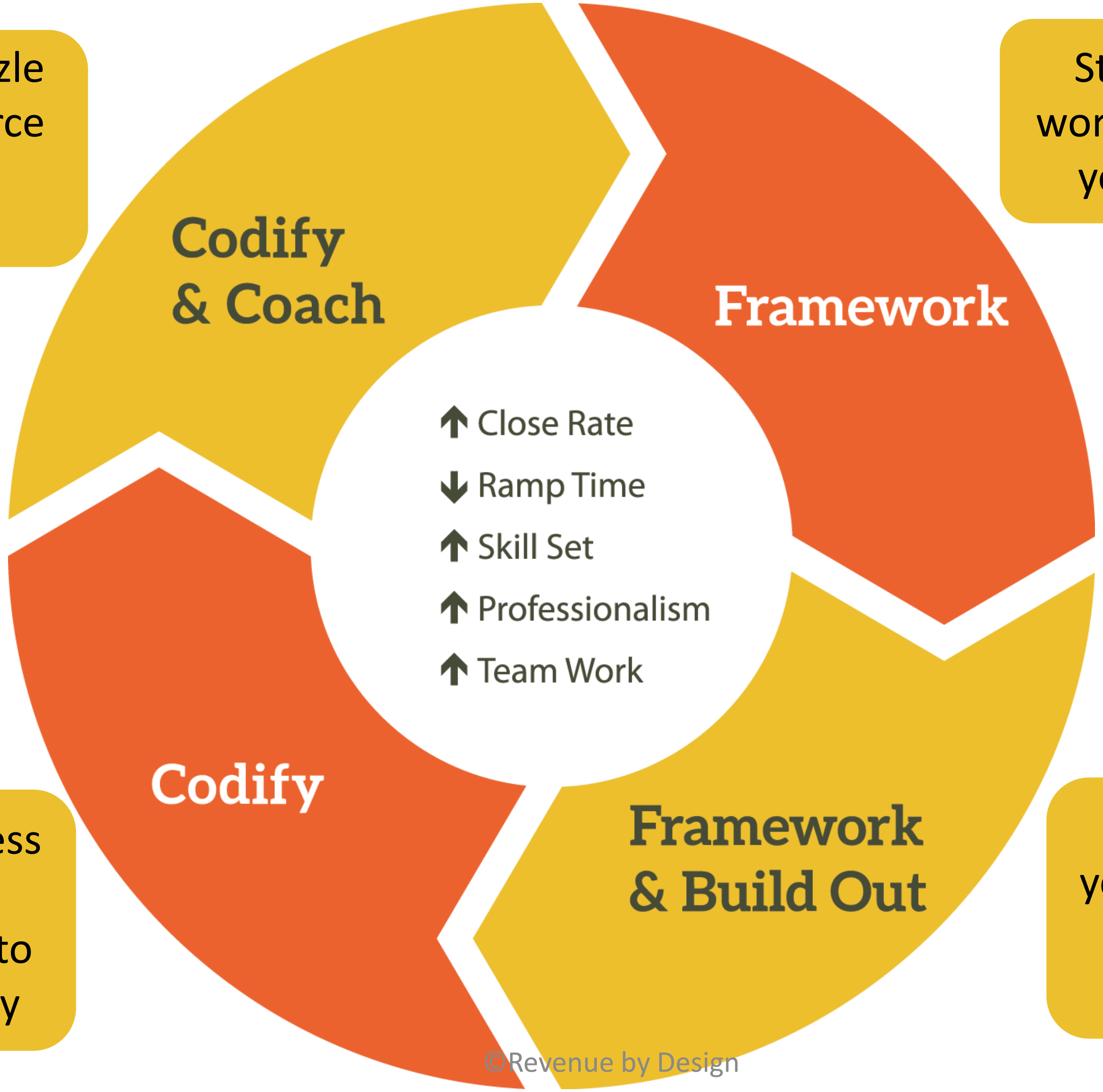
Seats are limited!



# Areas to Work Together

The final piece of the puzzle is to then coach to reinforce the process and drive ownership by the team

Start here and we can work together on creating your sales framework




Step 3 is to codify the process into your LMS creating learning pathways leading to repeatability and scalability

Then we can build out your framework by adding details, examples, milestones, etc.

# 3 ways to engage

## Advisory Services

- Weekly strategy sessions with CXO
- Guide goal-setting and performance planning
- Create action items to be executed by the client

## Consulting Services

- All of Advisory Services +
- Weekly meetings with revenue teams
- Weekly one on one's and huddles with revenue team leaders

## Fractional Services

- Advisory + Consulting Services
- Creation and deployment of Sales Program

Our Purpose:

RbD exists to help companies stand up or refresh their Teams the right way the first time. We also exist to partner with companies to be successful.

We do this by bringing a proven framework and system to each engagement and team

We know we're successful when we the team(s) achieves the desired goal above and beyond expectations

# Thank you!!

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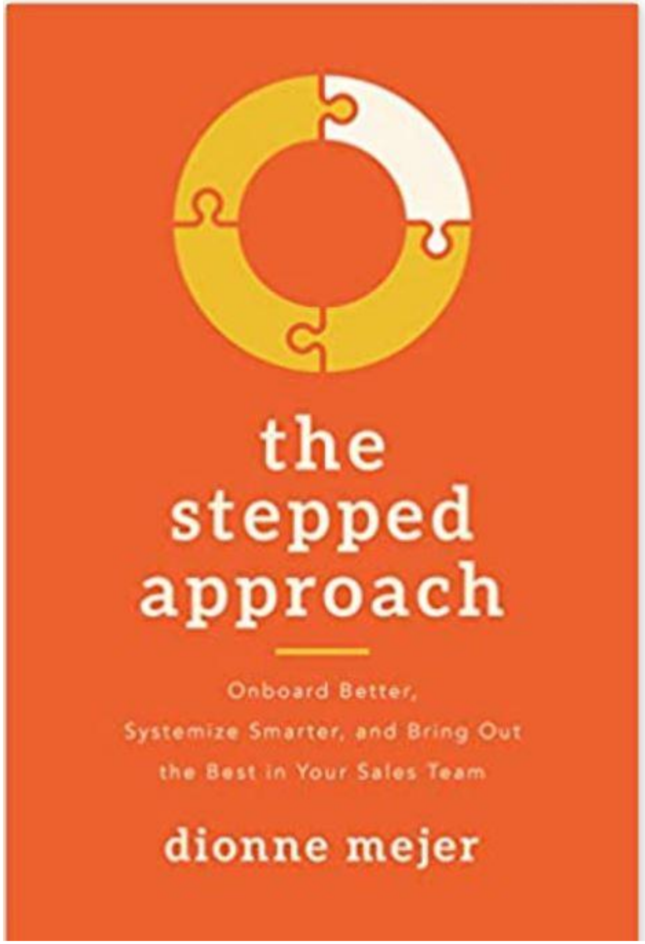


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