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WORKBOOK

3 Steps to Prime Your Pipeline for Growth

Introduction

Top-performing sales organizations understand the importance of effective annual planning. But simply having an initial plan isn't enough. To drive success, organizations need to put in place the foundational elements that help continuously track, validate, and improve execution against the plan.

When it comes to planning for healthy pipeline and revenue, go-to-market (GTM) teams are best served by both automation and data. Calling upon these enablers positions teams to make informed choices about which opportunities and accounts to focus on and how to optimally work as an orchestrated team to deliver the best possible outcomes.

Following the steps outlined in this workbook will ensure you make the right choices in how to direct the time and efforts of everyone on the GTM team. Simply put, this workbook will help you lay a foundation for consistent and productive planning activities that ultimately yield more pipeline and revenue generation.

Three steps to prime your pipeline for growth:

1. Use account engagement data to design and optimize sales territories
2. Enable effective account planning and tracking in CRMs
3. Optimize the use of the supporting sales ecosystem

Who Will Benefit From This Workbook?

- **Chief revenue officers** who want to improve collaboration across GTM teams to enhance sales planning efforts and keep teams on the right path to creating and converting pipeline.
- **Sales leaders and operations teams** who need to improve territory designs and the adoption of account plans, then measure the impact on the business.
- **Frontline sales managers** who want to improve their coaching techniques, validate reps are following account plans, and improve overall execution.
- **Leaders from supporting teams** such as sales engineering who want to ensure team members are focusing on the right accounts and opportunities to improve results and employee retention.

Step 1: Use account engagement data to design and optimize sales territories

Territory designs are crucial, yet many fail to deliver on their promise of driving higher rep productivity and revenue growth. One key factor? A lack of up-to-date and accurate data on accounts and contacts, which means territory designs are often based on little more than seller anecdotes and guesswork.

Conversely, when account and contact engagement data is readily accessible in a single place, sales leaders can say goodbye to manual correlation or relying on reps to self-report activities. Better yet, they can design territories and dynamically reassign resources to drive better results.

The Key Enablers

Centralize and enhance GTM data, and make it accessible to other teams where they need it.

Forcing reps to manually enter data into a CRM usually means that critical details are miscaptured or missing altogether because that exercise often occurs well after the actual sales activity has taken place. Using a solution that indexes sales activity data into your CRM in near real time is a better alternative.

The ideal solution automatically captures details from all the contacts your reps have already engaged – even if they're not currently in your CRM – by syncing business-relevant details from your reps' email, calendar entries, virtual meetings, and other sources. The right solution should also filter out data that doesn't belong in your CRM, such as personal correspondence and sensitive financial information.

Pairing activity capture with rich visualizations of the entire buying group – through tools known as relationship maps or organization charts – can help remove account blind spots. Such capabilities can help map individual buying influence, connections between involved contacts, and more – providing a basis for "who's who in the zoo" as teams enter annual planning activities.

Lastly, while the CRM is a system of record for sales, reps will likely need to tap into data from applications their GTM counterparts are using – and vice versa – such as BI tools and marketing automation platforms. Here, looking for a solution that calls upon open, easy-to-use APIs is a must so you don't have to unify data with a heavy, one-time, costly project. Instead, you can approach this on an application-by-application (or use-case-by-use-case) basis, unlocking more value from investments in your existing tech stack while future-proofing your sales infrastructure.

How You'll Measure Success

1. % increase in contacts per account record
2. Improved contact engagement signals
3. % increase in seller productivity due to less manual data entry
4. % increase in overall usage of CRM and other GTM tools

The Key Enablers	How You'll Measure Success
Continuously enrich data and make it more actionable for faster decision-making. Centralizing your existing GTM data in CRM and making it more accessible in other places is a valiant first step. But to take this further, that data should be continuously enriched, viewable at a glance, and easy to act upon. For example, the relationship maps in your CRM should seamlessly update as new contacts emerge or when existing contact details change – for example, titles or email addresses. Moreover, syncing of activity data can't be a one-time exercise. As sales reps, pre-sales, or marketing engages a particular account or contact, those activity details should automatically be populated, creating a full digital engagement trail that can quickly surface prescriptive next steps. To make data more consumable – especially for CROs and sales leaders – all this intelligence should be automatically correlated and presented via rich, persona-based dashboards. Ideally, the dashboards feature simple visualizations that help you immediately understand what is being revealed by the underlying data – including time spent by both internal participants and external stakeholders. Color coding is another desirable feature so you can quickly grasp status, such as green for healthy, red for at-risk, and yellow for under-engaged accounts or opportunities. Pairing these with numerical values – overall engagement scores, meetings completed, hours spent on an opportunity – can help frontline managers easily assess rep activity and compare it to behaviors of high performers.	1. % decrease in time to prepare reports (e.g., forecasts) 2. % increase in accuracy of reporting (to inform and improve decision-making) 3. Expanded reporting capabilities that align to your specific use cases (e.g., account coverage, sales capacity)

The Key Enablers	How You'll Measure Success
Apply newly acquired insights to improve territory designs. With better insights at their fingertips, sales leaders and sales operations teams can now develop more equitable territories. Data around historical patterns plus current effort and engagement data across the salesforce helps optimize territory mapping in real time. For example, if you surface under-engaged accounts in existing territories, you can reassign them to different reps. Using verifiable account engagement data when designing sales territories means you can also identify dormant accounts displaying high intent. By accounting for those target-rich opportunities, you are better positioned to increase sales capacity and build a healthier pipeline. Overall, with this foundation in place, you can: • Quickly shift resources to ensure accounts with low coverage are appropriately addressed. • Determine the precise number of accounts per rep. • Ensure resources are allocated to territories that require it based on engagement levels. • Allocate territories in a way that feels fair and empowers every seller.	1. Faster delivery of annual and quarterly sales plans 2. Improved sales coverage and capacity per rep 3. % improvement in reps attaining quota 4. % improvement in retention of sales reps (measured by average duration of tenure)

Checklist: Pinpoint Your Strengths and Areas for Improvement

- [ ] Our sales reps and leaders are no longer manually keying sales activity data into CRM. The process is automated, and data is accurately matched to the right account or contact record.

- [ ] We can sync data between multiple GTM tools. Team members no longer have to copy, paste, or manually rekey data across tools, nor pivot between as many screens to complete tasks.

- [ ] Every member of the cross-functional GTM team – including marketing and customer success – has access to and operates from the same account information.

- [ ] Our account and contact engagement data is presented in easy-to-consume dashboards, so we require little to no manual correlation or heavy analysis to arrive at decisions.

- [ ] Our territory designs are based on data, not rep anecdotes or assumptions. Sellers feel territories are more equitable, and we've maximized sales capacity using existing headcount.

3 Key Elements and Must-ask Questions for Optimal Territory Designs

1. Effort: How many touch points are taking place per account? Are discovery meetings happening? On what cadence? How much time is being spent on each account?

2. Engagement: How many people are sellers engaging on each deal? What kind of intel do those interactions produce? If sellers only engage 20 of the 30 accounts in their territory, that presents an opportunity to carve out a new territory, or reassign those untouched 10 to another rep.

3. Historic: How many touch points took place on previous successful deals? Were they single- or multi-threaded? Did it take 10 discovery meetings or 20 (and with how many personas)?

> When we reassign accounts into different coverage models, People.ai data gives incoming reps a tremendous amount of insight for a handoff. People.ai adds contact insights and a level of intelligence to accounts that we didn't have in the past.
>
> **Mikita Mikado**, CEO, PandaDoc

Step 2: Enable effective account planning and tracking in your CRM

In one Gartner study, only 28% of sales leaders reported that the account management process regularly met their cross-selling and account growth targets. Or, put it another way: nearly 70% of leaders are missing targets due to ineffective account management. What is it about account planning that makes it so hard to get it right?

Sales reps usually develop account plans outside CRM by cobbling together information from multiple sources. Equipping them to create and manage plans within CRM is a win-win-win: reduced administrative time, more effective plans, and the ability to track and course correct in near real time.

The Key Enablers	How You'll Measure Success
Operationalize your account planning methodology, process, and strategy in CRM. When executed properly, account planning is mutually beneficial for customers and sellers: both parties capture the greatest value and nothing is left on the table. As outlined in the previous step, automatically capturing activity data in CRM is important for downstream sales planning and execution. Layering in account planning capabilities that are seamlessly embedded in your CRM is a logical next step. By keeping sellers in the system where they most often work, you can drive more consistent strategies and processes, thereby ensuring account plans are updated on a more timely basis and being followed as intended. Once you operationalize in this way, you can call upon additional tools – such as account scorecards – to assess customer or prospect health and engagement. Such scorecards should provide at-a-glance views into how well the account plan is being followed, including progress bars showing the status of key areas of activity, including understanding of customer initiatives, competitive threats, and potential solutions. If AEs have not been engaging their accounts on a regular basis, these insights will be surfaced, giving you the ability to coach them towards a more involved and effective account plan. Ideally you can even add weighted scoring and build custom scorecards based on your standard sales methodology or GTM motion, helping drive further adoption of other critical processes.	1. % increase in number of documented strategic account plans 2. % increase in reps creating account plans

The Key Enablers	How You'll Measure Success
Reinforce the plan and measure progress within your CRM. Fueling account scorecards with engagement data provides a level of visibility that many sales organizations struggle to obtain. Automatically capturing details on the specific activities reps are spending their time on and the people they're connecting with throughout the process provides a solid basis for assessing account engagement. Next, use historical data and AI to understand what types and volume of activities drive the best sales outcomes, and you can answer questions like: • Which accounts are getting the right amount of engagement? • Which accounts are under-engaged, and what are the next best steps? • Who are the personas we should be engaging and how often?	1. % increase in account plan adoption and compliance 2. % increase in strategic accounts that are actively engaged 3. % increase in strategic accounts with active pipeline
Track progress, make changes, and pinpoint incremental opportunities for growth. Account planning shouldn't be viewed as a once-a-year activity, nor should you wait for QBRs or deal reviews to assess progress. Instead, use accurate, up-to-date account data to validate plans are on the right track, make in-quarter adjustments, or propose larger changes when planning season rolls back around. One of the best ways to monitor progress is through management reports in your CRM, which are now augmented with a variety of value-added data points. Ideally, these show engagement activity, deal health, relationship maps of the current buying group, and other leading indicators. Lastly, use whitespace maps to identify potential cross-sell and upsell opportunities. Whitespace maps help you see where your products have already been deployed, then pinpoint expansion opportunities based on other business units that may benefit from your offerings. In other words, they empower you to easily identify the most effective route to growing revenue within existing accounts during planning season. Ideally, the feature will allow you to customize and deploy maps for the different GTM teams and workflows required to support a single account.	1. % improvement in overall account plan execution 2. % increase in pipeline generated based on account planning activity (expressed in number of opportunities or overall revenue) 3. % increase in revenue recognition attributed to account plan execution

Checklist: Pinpoint Your Strengths and Areas for Improvement

- [ ] We are using supporting software to help track and enforce account plans. This software is natively embedded in our CRM and doesn't require sales reps or leaders to log into a separate tool.

- [ ] Our reps no longer view the account planning process as merely an annual, mandatory exercise or checkbox. More reps are following their strategic account plans, and it's helping focus their time and efforts.

- [ ] Sales leaders can easily determine how well reps and extended teams are executing against account plans because the right insights and prescriptive next steps are surfaced in CRM.

- [ ] We don't have to wait for QBRs, deal reviews, or the next planning season to make adjustments – we are continually updating our account plans based on the latest account data and indicators.

- [ ] We can now quantify the impact of account planning efforts to metrics such as more closed-won expansions, better renewal rates, lower customer churn, larger deals, and shorter sales cycles.

A Profile in Customer Success

HEXAGON

Company profile: A global leader in sensor, software, and autonomous solutions

Challenges: Needed to expand into new markets, but couldn't without a comprehensive rethink of its GTM strategy, processes, and sales technology.

Solution Capabilities: Gained visibility into how GTM teams had engaged with buyers in the past, who was involved in conversations, and how long it took to convert engagement into real opportunities.

Outcomes:

- Ingested 80,000+ new contacts into CRM with accurate account roles and affiliation
- Captured 746,000 sales activities including contact frequency and deal health insights
- Improved opportunity decision-making and forecasting accuracy

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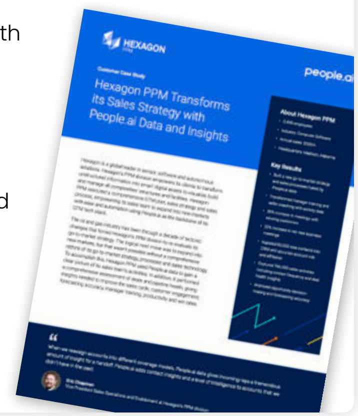


Step 3: Optimize the use of your supporting sales ecosystem

Selling as a cohesive team is imperative for successful execution against account plans and in-flight opportunities. While sales reps and pre-sales solution engineers usually bear the most burden when converting prospects to customers, it takes an entire supporting cast to land a prospect, then subsequently retain and expand within an account. Key to this is ensuring executives, professional services, customer success, product marketing, and other experts are engaged at the right time with the right accounts, and spending the appropriate amount of time with each.

The ability to measure, adjust, and reallocate supporting resources is a must when selling into enterprise accounts. To optimally harness the full supporting sales ecosystem, organizations need to call upon real-time, accurate data providing insight into execution against both opportunities and larger operational plans.

The Key Enablers	How You'll Measure Success
Allocate resources strategically and equitably. Every high-performing sales team ensures AEs and supporting GTM teams are focused on the biggest and best opportunities. Specifically, that means spending more time and effort on deals with a high likelihood of closing for larger revenue amounts. To that end, it's key to understand the activities every member of the GTM team is engaged in across opportunities and accounts, along with potential deal sizes. Ideally, you can see time spent on each opportunity, giving a justifiable metric for pushback when one opportunity is taking up too much of the supporting ecosystem's time at the expense of more promising opportunities. With that visibility, sales leaders can easily determine the best allocation of resources and drive a focus on high-value activities. This also empowers sales executives and other GTM leads to eliminate an overallocation of resources to AEs making the most noise (i.e., the squeaky wheel syndrome). With data showcasing the distribution of resources and actual time spent across opportunities correlated to the impact on deal progress and potential revenue, it's easier to equitably assign resources. These same insights help balance workloads across the supporting ecosystem, helping avoid burnout while also keeping customer acquisition costs in check.	1. % increase in average deal size 2. % reduction in team member turnover 3. % decrease in customer acquisition costs 4. % increase in team member productivity or utilization

The Key Enablers	How You'll Measure Success
Increase the likelihood that opportunities close by ensuring the right resources are engaged at the appropriate time. Just as important as strategically allocating resources is understanding whether those resources are impacting outcomes. It starts with ensuring resources are looped in at the right time. When AEs commit deals too early, the supporting ecosystem can spend time on opportunities that aren't yet primed for their involvement. Conversely, if a deal is strong and advancing through stages but supporting GTM members have only been looped in at a cursory level, there's danger the deal won't close in the specified time frame. A common example? Not including a sales engineer early on in the process to help validate that your solution fits key technical requirements, or providing a high-level business case and demo in subsequent stages. Again, the correlation between deal activities, size, and progress is key. Insight into whether the appropriate GTM members have been involved with the opportunity can help determine both the realness of a deal, and whether more of their time should be directed toward a specific opportunity.	1. % decrease in sales cycle length 2. % decrease in opportunities slipping to future quarters 3. % increase in opportunity conversion rates 4. % improvement in sales forecast accuracy
Improve transition plans with a full digital trail of activity in CRM. Even if you right-size workloads across team members, turnover is inevitable. Fortunately, by capturing all the engagement data, sales activities, and account planning details in previous steps, you've already mitigated the impact of losing team members. Or, to put it more positively – you've instantly ramped up account successors. Instead of holding numerous knowledge transfer sessions or forcing team members to manually document transition plans, all the vital information is already captured and accessible in the CRM. This empowers new sellers or entirely new teams to hit the ground running on day one. Oh, and better yet? This digital trail will pay more dividends once it's time to revisit territory designs and other activities during next year's annual planning season.	1. Faster onboarding time for new team members 2. Improved customer satisfaction rates 3. Less customer churn, despite accounts changing hands

Checklist: Pinpoint Your Strengths and Areas for Improvement

- [ ] We can now improve the utilization of all supporting sales resources because we make assignments based on account and opportunity data, not assumptions or gut instinct.

- [ ] We can pinpoint the exact amount of time each sales resource is spending on a given account or deal, ensuring the opportunity cost doesn't exceed the potential yield in revenue.

- [ ] We are driving higher productivity, improved deal sizes, and shorter cycles because we now commit opportunities at the appropriate time while involving the appropriate internal resources.

- [ ] We can use these same insights to minimize burnout and decrease overall attrition. Employee satisfaction scores amongst GTM teams have improved as a result.

- [ ] When we do experience turnover, the ramp-up time for the newly appointed team member has decreased significantly, as all existing data is available at their fingertips.

A Profile in Customer Success

zoom

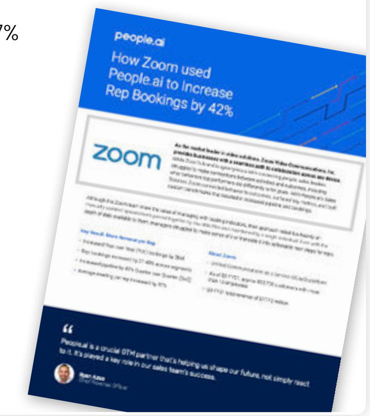
Company profile: Market leader in video solutions

Challenges: Sales managers struggled to understand how reps spent their time, impeding coaching efforts.

Solution Capabilities: Enabled complete view of rep engagement across accounts, opportunities, and contacts, including where reps were spending their time, the people involved, and the why behind stalled deals.

Outcomes:

- Rep bookings increased by 21-49% across segments
- Increased pipeline by 43% quarter over quarter
- Average meetings per rep increased by 37%



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Conclusion: Strategically Plan for Pipeline Success

Determining where to focus GTM resources is the key to efficient, successful revenue generation. It starts with strategically assigning reps to territories so each is matched with enough opportunities that capitalize best on their experience and knowledge to both generate and progress pipeline.

The next step is for reps to consistently create and execute account plans in a way that provides sales leadership and the extended GTM team with a view into how – and how well – the plans are progressing. Such insight paves the way for timely course correction. Finally, GTM leadership must be empowered to easily determine when and where resources are best allocated to help move deals to completion.

By calling upon the right enterprise revenue intelligence platform, GTM teams gain support for key processes, a way to operationalize and measure against plans, and accurate, complete data insights needed to optimally plan for – and ensure – account success. Simply put, such a platform provides the data and automation that paves the way for more confidently and strategically pursuing the most promising opportunities and closing the biggest deals in a timely, efficient manner.

Start guiding your teams down the proven path to revenue success

The People.ai enterprise revenue intelligence platform helps teams speed up complex enterprise sales cycles by engaging the right people in the right accounts.

We do it by helping teams clearly see who to engage within each account and exactly what to do to deliver the highest-yielding deals and blow out their numbers every single quarter. Learn more about our approach by reviewing the solution brief.

Ready to see this in action for yourself? Sign up for a demo today!

REQUEST A DEMO

About People.ai

People.ai is the leader in guiding enterprise sales teams on the proven path to pipeline and revenue generation. The People.ai enterprise revenue intelligence platform ensures organizations speed up complex sales cycles by engaging the right people in the right accounts. Through our patented AI technology, People.ai enables sales teams to clearly see whom to engage within each of their accounts and exactly what to do to deliver the highest yielding deals. Enterprises such as AppDynamics, DataRobot, Okta, and Zoom know that people buy from people, that's why people buy from People.ai.

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