



# Head of Sales

## Goals

## As measured by

**Soar past bookings target for Q1 in preparation of fundraising**

1. Secure \$10M in bookings by end of Q1
2. Ensure each sales manager contributes \$4M or more in bookings
3. Ensure at least 60% of Sales team achieves quota
4. Deliver 40% of our overall bookings via upsell and cross-sell
5. Attend 3 industry events by end of Q1

**Become the most effective sales machine in our industry**

1. Launch the energy vertical sales plan at department all-hands by end of Q1
2. Hire 3 new sales managers by end of Q1
3. Certify 90% of team on new process by end of February
4. Receive approval from CEO on new sales compensation commission plan by January 31

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Adopting OKRs for goal creation ensures employees in every department and function are aligned and working toward the organization's top priorities.

Every organization is unique and there is no one-size-fits-all approach to Continuous Performance Management. You want to understand all the learnings and best

practices, and then use them to craft the unique program that best fits your organization's culture and business needs.

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# Sales Manager

## Goals

## As measured by

### Win in new territories

1. Hire 2 new Account Executives
2. Close 3 tier 1 customers in both Southeast and TOLA regions
3. Meet with 45 new opportunities by the end of Q1
4. Work with Head of Field Marketing to generate 300 new leads in each region

### Become an efficient AND effective sales team

1. Contribute \$1M in bookings by the end of Q1
2. Contribute \$4M in new pipeline opportunities by end of Q1
3. Keep pipeline above 3x at all times
4. Achieve linearity targets with 20% closed by end of month and 50% closed by end of month 2
5. Shorten the sales cycle average time by 30%

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# Account Executive

## Goals

## As measured by

**Build discipline around lead and opportunity management**

1. Maintain 100% of opportunities that are not older (younger) than 60 days
2. Convert or downgrade all leads within 14 days
3. Meet with 75 new opportunities by the end of Q1
4. Document 50 new discoveries in SFDC for Q1

**Soar past my new bookings and pipeline for Q1**

1. Contribute \$250K in bookings by the end of Q1
2. Contribute \$1M in new pipeline by end of Q1
3. Keep pipeline 3x the sales target at all times
4. Deliver 40% of territory bookings via upsell and cross-sell
5. Achieve linearity targets with 20% closed by end of month and 50% closed by end of month 2

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# Sales Development Representative

## Goals

## As measured by

**Enable our team to be amazing salespeople**

1. Craft a social selling email template by February 13
2. Send social emails to 10 contacts per week for the duration of Q1
3. Train 3 new SDRs on social selling best practices
4. Touch 100% of leads every week

**Tee up our AEs to soar past their numbers**

1. Create an account plan for each tier by January 31
2. Generate 60 SQLs by end of Q1
3. Source 30 Fortune 1,000 CXO meetings by March 1
4. Bring in \$200,000 in bookings by end of Q1

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