Pocus

The Product-Led Sales PLAYBOOK

VOLUME TWO

FOREWORD

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CEO & Co-Founder at Pocus

2022 was the year Product-Led Sales had its grand debut. From just another acronym to climbing the keyword charts, PLS has become a hot topic for go-to-market teams. The category evolved (and expanded) to a point where its very name — the one Pocus coined! — no longer covers the vast surface area of this go-to-market motion.

Some things haven't changed since Volume 1 of the PLS Playbook, including these three truths:

1. The best PLG companies have sales teams
2. Accessible and actionable product usage data holds the key to revenue health and profitability
3. The self-serve flywheel is an instrumental acquisition channel for many SaaS products

However, product-led is not a zero-sum game. It's a spectrum. Where you land on that spectrum should depend on how customers want to buy from you. You may have a segment better served through self-serve and another that needs an outbound sales motion, and sometimes these segments intersect. Your product might be too complex for a completely self-serve path, but you may lower acquisition costs by investing in onboarding automation and other early points of the customer journey. On the flip side, your self-serve product could be generating such volume that you're struggling to spot sales opportunities.

These three hypotheticals represent challenges for very different products, yet, PLS can solve them all — with a big caveat. A Product-Led Sales motion is not one-size-fits-all, and it is not a static strategy.

This playbook covers how leading SaaS companies across the product-led spectrum have implemented this data-powered revenue engine. No theory, just articles from experts who have been in the trenches outlining the steps they took to succeed.

UNLOCK GTM SECRETS FROM

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SECTION ONE

THE PRODUCT-LED SALES MARKET

PLS has evolved to be much more than creating a PQL score and tossing that over the fence to your reps. It's a cross-functional go-to-market strategy that aligns each team: sales, marketing, customer success, and growth to your company's revenue goals. At its core, PLS is a data-driven and value-first approach to go-to-market. PLS enables software companies to capture more revenue through improved retention, efficient expansion, or decreased CAC. In this section, we dive into the state of PLS, current trends, and evolution.

THE STATE OF PRODUCT-LED SALES

Pocus, OpenView, RevGenius, RevOs Co-op

2022 Product-Led Sales Benchmarks Report results

We planted the first flag for Product-Led Sales benchmarks last year. This year we're back to dive into the deep end. How have things changed or remained the same? The 2022 PLS Benchmarks Report offers fresh insights for modern go-to-market teams.

Continue reading for an analysis of the results.

You can download the full report here.

Introduction

In 2021, we set the foundation for understanding how revenue engines are built in a product-led world and uncovered a dirty little secret - all the best PLG companies have sales teams. PLG is not a silver bullet, but neither was sales. We learned that modern go-to-market motions require a mix of bottom-up and top-down approaches. This hybrid strategy powered by data is Product-Led Sales.

2022, in many ways, has been the year of Product-Led Sales. In 2022, Product-Led Sales was recognized on the famed Gartner Hype Cycle for CRM technology as an innovative technology space with high benefits for go-to-market teams. Companies like Zapier and Canva hired for "Head of PLS" roles. Going into 2023, PLS appears as a line item in go-to-market budgets.

Despite the progress, Product-Led Sales is still very much in the early innings. As the category matures, so do the types of questions, concepts, and playbooks that teams need to succeed. Pocus, OpenView, RevGenius, and RevOps Co-Op teamed up to launch the second annual Product-Led Sales

THE NUMBERS

49% of companies already have a Product-Led Sales motion in place

12% of companies have implemented a third-party PLS platform

86% offer a free trial or freemium/ low-cost entry point

52% of sales teams are conducting outbound to PQLs

7% allow enterprise segment to self-serve

52% have product usage signals to identify enterprise opportunities

Benchmark Survey to understand how the space has evolved.

The report includes 200+ respondents from some of your favorite PLG companies (both veterans and newbies represented) to answer nuanced questions like:

1. How are customers buying products?
2. When should you layer sales in the customer journey?
3. What metrics should you track?
4. What sales roles are PLG companies prioritizing?
5. What does sales compensation look like?
6. What are the top tools used by PLG companies to enable PLS?

The age of hybrid sales

As more companies go product-led, PLS has become a popular hybrid option for go-to-market teams looking to scale user growth and revenue. Last year's benchmark report dispelled the myth that PLG means "no sales," but we're adding a significant caveat this year.

Not only do product-led growth companies have sales teams, but these teams also pursue multiple sales motions to reach their goals. Like we did last year, you would think that a PLS team would not pursue outbound sales. The data tells us otherwise.

Which of these options most accurately describes your sales motion?

*Respondents could select more than one answer

Download full report

PLS doesn't exist in a vacuum. A product-led approach can inform messaging for cold outbound and integrate with outreach efforts backed with product data.

Here's a helpful way to think about the mix of playbooks.

It's a two-way street, but product usage data is key across these various playbooks. It makes sense. Spending resources to know how users interact with your product can help frame value propositions, get a fuller picture of ICPs, and give sales teams the insights they need to close enterprise deals.

	Self-Serve (PLG)	GTM-Assist (PLS)	Sales-Led (Enterprise Sales)
Sales Motion/ Playbooks	• Low Touch User Growth • Seed, land & expand	• Monetization • Account Expansion • Churn Prevention	• Outbound • ABM
Primary Target Segments	Anyone	Active Product Usage / High ICP fit	High ICP fit
Primary Goal	• Self-Serve Revenue • User Growth	• Pipeline Expansion • Retention • Revenue Growth	• Pipeline Generation • Revenue Growth
Funnel Metrics	Product Sign Ups PQLs MRR or ARR ($$) NRR/ARR Expansion	Product Users PQAs Opportunity MRR or ARR ($$) NRR/ARR Expansion	Target Accounts/ICP Fit Qualified Accounts Opportunity ARR ($$) NRR/ARR Expansion

Revenue drivers

A look into the revenue split between channels tells the story.

33% of revenue comes from self-serve/PLG

28% from Product-Led Sales

56% from sales-led

Diving deeper reveals an even more interesting story. We found that sales-assist is the unsung hero of revenue attribution, ranking highest among respondents. While still an underutilized channel, the companies that offer assistance through product specialists or product advocates see the most impact.

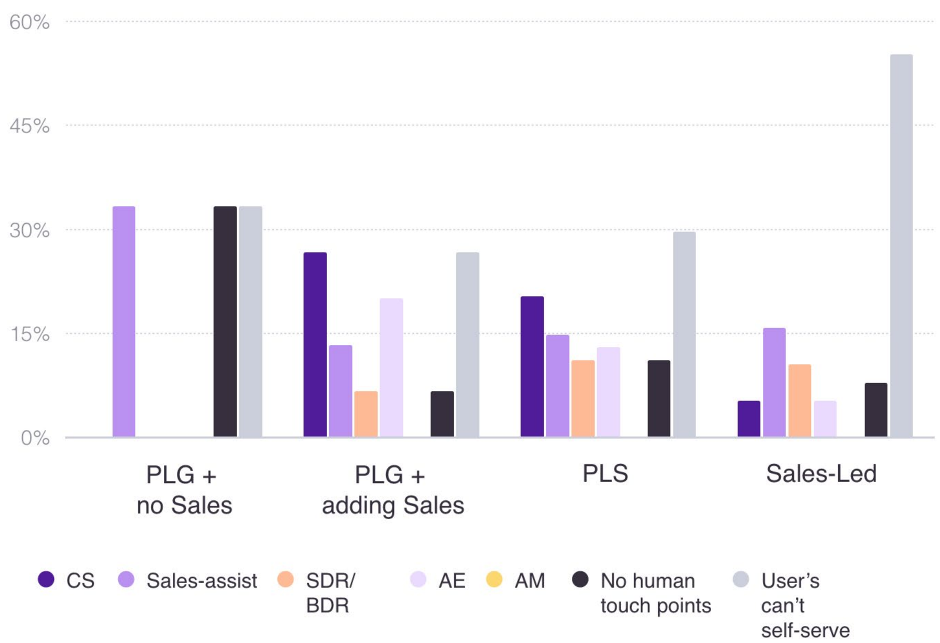
"Can I speak to a human, please?"

Most buying paths rely on human touch points. Yes, even in a self-serve motion.

Most respondents (52%) have a human touch when an enterprise user self-serves on to the product. Some standard plays we've seen Pocus customers use to reach out to high-potential customers include:

- Sending highly personalized emails when enterprise decision-makers sign-up
- Reaching out to assist once the user completes onboarding
- Congratulating a user personally when they unlock a new feature

If the enterprise user can self-serve onto your product, are there any human touch-points?



When should you layer the human touch?

The challenge with hybrid go-to-market motions is knowing when to pull the right lever. Should sales reach out with a highly personalized email to every target sign-up? Should they wait until they become product-qualified? Should there be a low-touch automated sequence before sales engage?

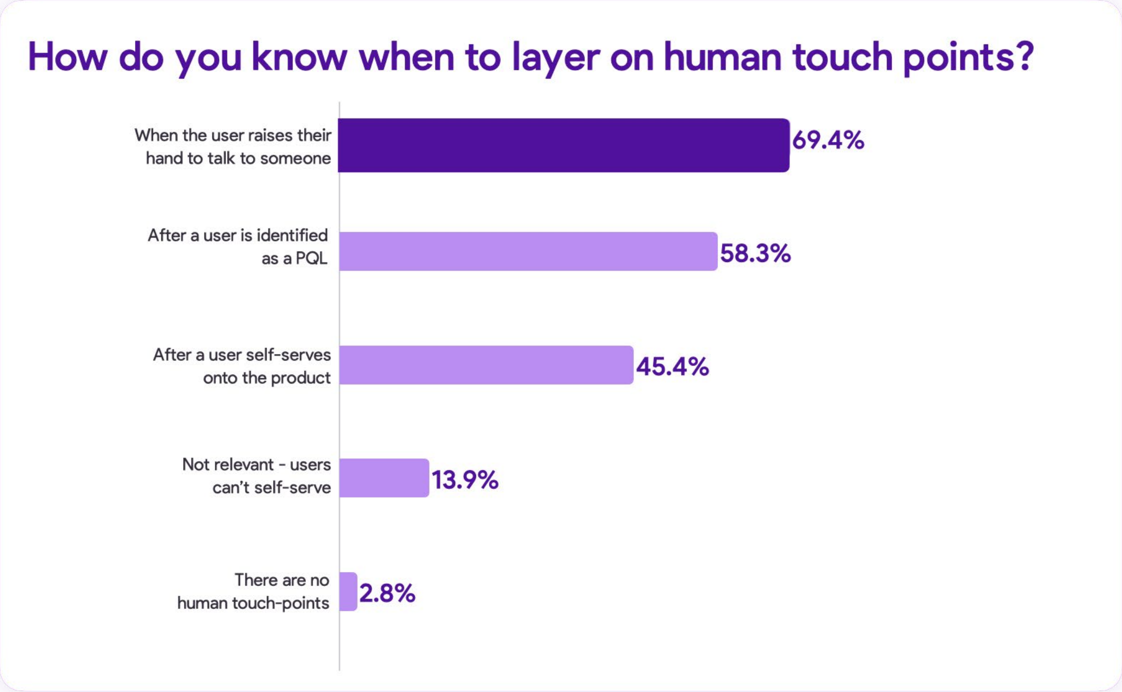
These are all the questions we hear in the Product-Led Sales community. This year we asked at what points in a customer journey the sales team reaches out:

- 69% of respondents will reach out primarily to "hand-raisers," an increase from 62% last year
- 58% reach out once a user becomes a PQL, i.e., takes some meaningful action that qualifies them for outreach
- 45% reach out to these high-value contacts immediately after sign-up (hopefully to offer help and not aggressively sell).

The most popular PLS playbooks all rely on human touch points:

#1 Assist: The assist playbook is about getting customers who need help to find value quickly. This playbook typically targets new freemium or free trial users (first 7 or 30 days, depending on the length of onboarding and trial) to get these users to hit a particular milestone in the product.

#2 Convert: The goal of a conversion playbook is similar to Assist but with the explicit purpose of converting high-potential free users into paying customers. The goal of this playbook is not to reach out to every free user with better-than-average product usage. Instead, sales teams



should focus on users with good product usage and high customer (ICP) fit.

#3 Expand: The goal of an expansion playbook isn't to upsell every existing customer. It's about helping align customers' product usage to their business objectives. The way to find these opportunities is to look at their usage patterns and build a compelling business case for expansion to the key decision-makers.

Learn more about the top 5 common playbooks

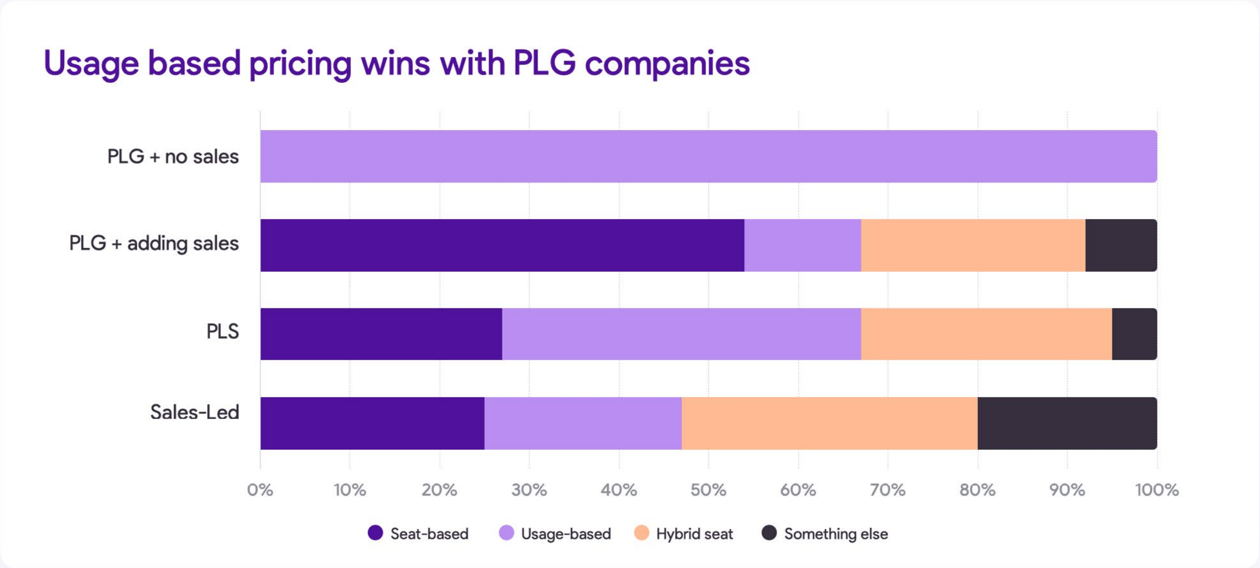
Still, some things don't change: Enterprise

For enterprise licenses, "contact sales" is still the most popular path (even at PLG companies). This metric was completely unchanged from last year, so few are ready to let users entirely self-serve for enterprise licenses.

Since much of the buyer's journey happens before a user clicks "contact sales," this call-to-action captures very high-intent users. Many enterprises may opt for a cheaper plan to get started and try a product, but if they click "contact sales" for a license, it's reasonable to assume they have a higher intent to buy.

Pricing: not one-size-fits-all

Survey data shows that respondents with a purely PLG motion have usage-based pricing. We see a wider variety of pricing models for the other three go-to-market motions, including usage-based, seat-based, hybrid, and different approaches.



Pricing is one of the hardest levers to nail for go-to-market teams, but one that can have an outsized impact on growth.

Designing your dream PLS team

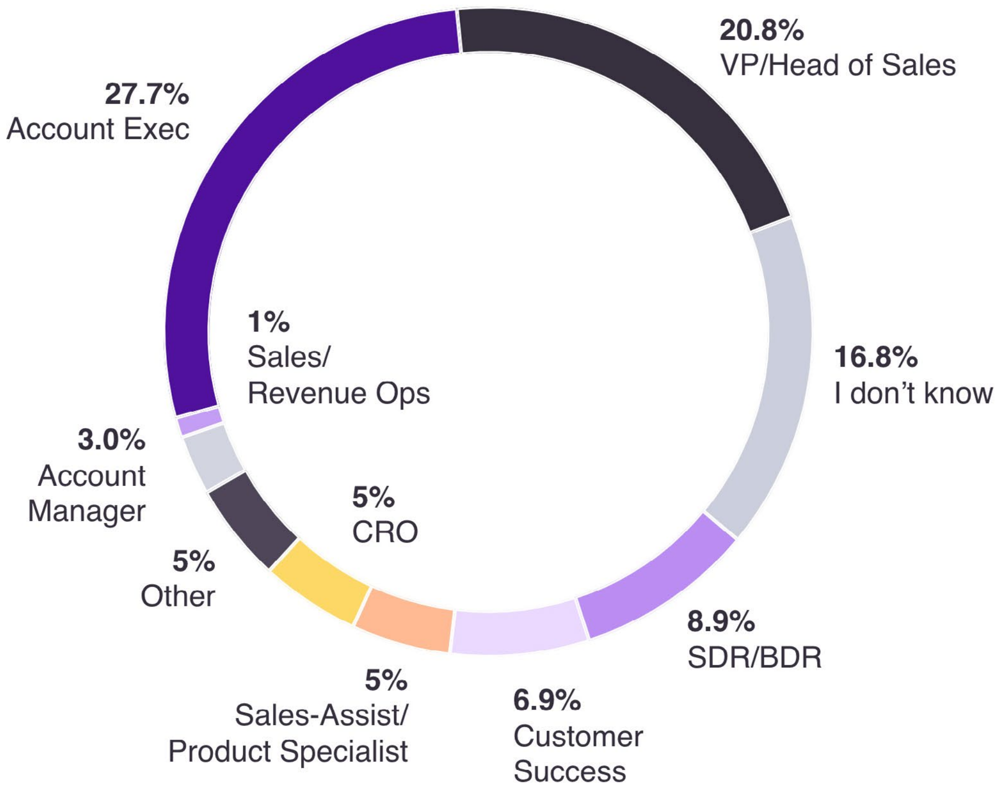
When to hire? Who to hire first? Is there a magical ARR number that triggers you to hire your sales team?

When it comes to who to hire, AEs lead the pack for the first sales hire, followed by a sales leader like the Head of Sales or VP of Sales.

As far as when to hire this person, the data tells us as early as possible. Unsurprisingly, the first sales hire for a sales-led motion stands at the $500K-$1M in revenue mark. With a Product-Led Sales motion, we see more variety in what ARR marker you should hire sales, but still, the majority also falls within the $500k-$1M revenue mark.

Team composition

We found that in companies with ‘$1M in revenue, the first “sales” hire is a customer success lead (42%), followed closely by a Head of Sales (32%). CRO role shows up more prominently in the $5-10M range and goes up from there. Sales-assist/product specialist is rising in popularity - it’s represented at



almost all levels of ARR. Head of Product-Led Sales makes up 6% of the overall total responses.

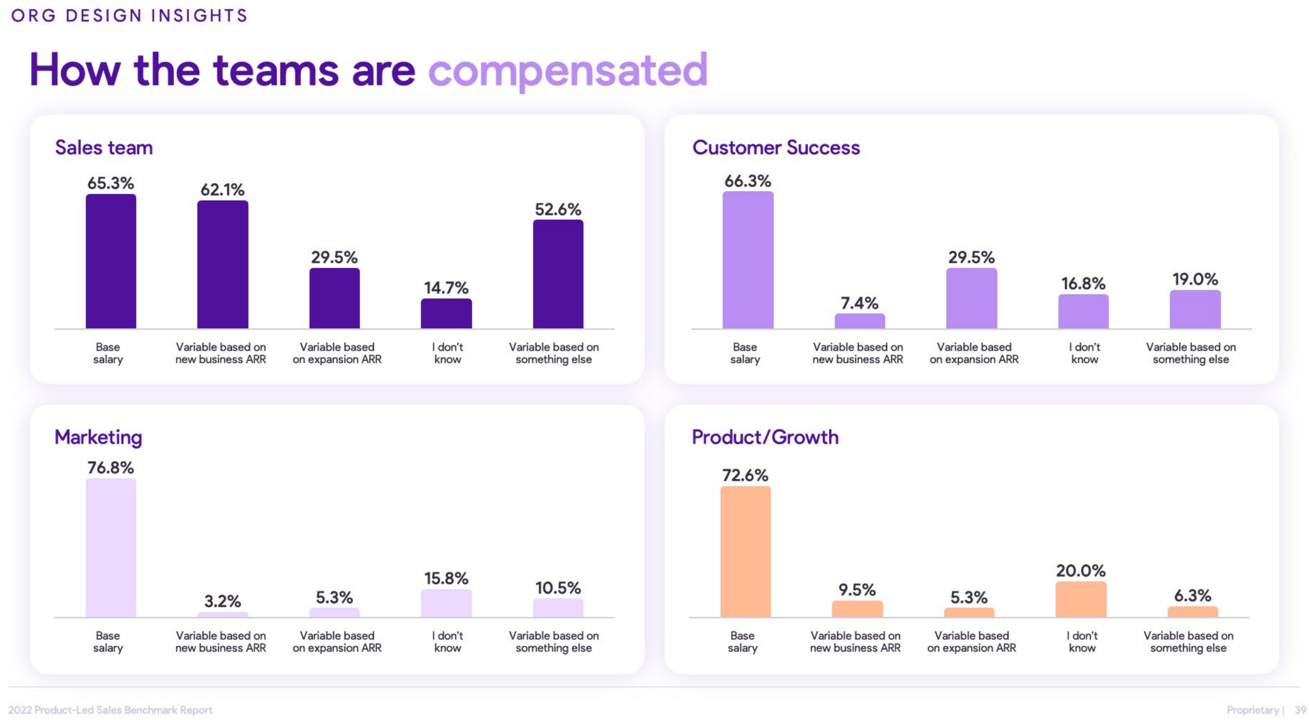
Let's talk about compensation

Compensation is a big one! Companies that are setting up their PLS function tend to run into compensation issues when it comes to revenue attribution. Since Product-Led Sales is a cross-functional effort, determining who gets the credit (and therefore commission-based pay) can be complex.

The benchmark survey shed some light on how companies compensate the different teams involved in PLS:

Attribution and compensation will depend on how teams structure their PLS motion. By giving ownership of different playbooks to different teams, it's easier to align commission to the goals of each team. For example, customer success can be compensated based on expansion, sales-assist on the number of customers helped, and product on PQLs.

Regardless of the specific company goals, aligning incentives to drive the right team behaviors is essential.



The biggest hiring challenge for PLS: culture shift

There's an avalanche of talent jockeying for sales positions. However, the skills and mindset that are successful in sales-led motions don't always translate to Product-Led Sales.

Most respondents shared difficulties hiring people with the technical savvy to define and operationalize PQLs and cultural understanding of going from a "close the deal" mentality to a "value first" approach. The truth is that most sales reps don't have PLG experience. We've seen companies like ngrok hire outside of the typical sales profile and instead look for talent with a builder mentality, natural curiosity, and a love of technology — with great success.

Can I get a vowel? PQAs rise in popularity

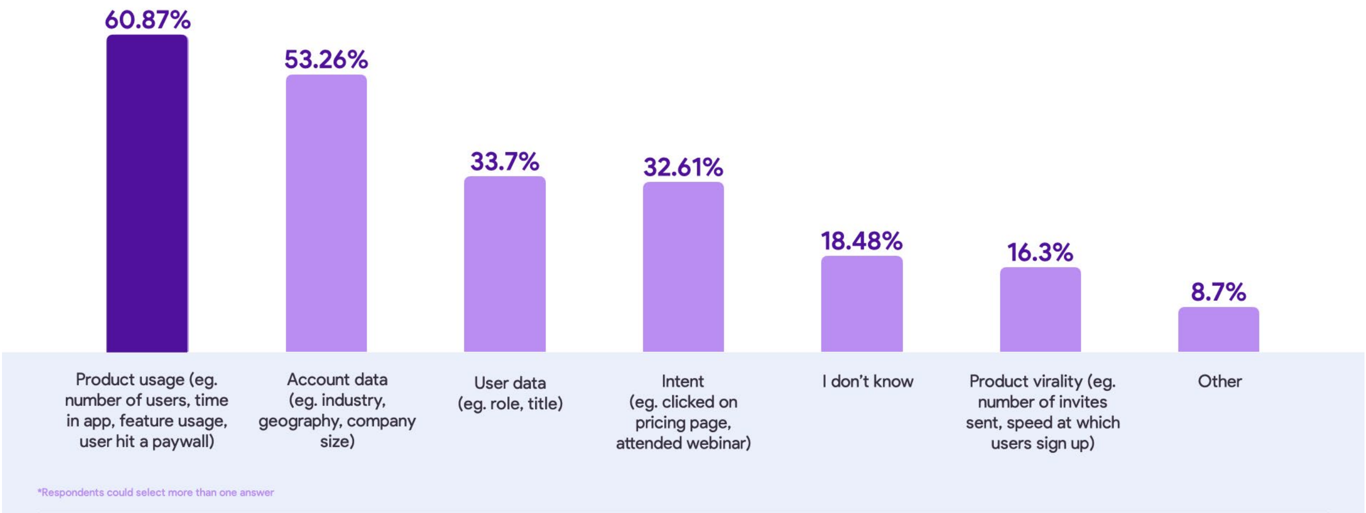
You can't optimize what you can't measure. Product-Led Sales is no different.

In a PLS motion, you need to measure the key indicators of success, which include the number of product-qualified leads (PQLs) or accounts (PQAs) surfaced, how those leads were actioned, and whether there was a meaningful lift in revenue, conversions, or other goals as a result.

For most teams, reaching this level of PLS maturity is challenging. In the early phases of a PLS motion, you may experiment with many product qualification definitions. You are testing very

METRIC INSIGHTS

How do you calculate PQL/PQA scores?



different customer segments and have yet to nail down a playbook.

Don't let that stop you from forming the habit of measurement. Here are the common metrics tracked and their benchmarks.

We've seen Product-Qualified Accounts (PQAs) and Product-qualified Leads (PQLs) used interchangeably. But, an optimized PLS motion should hold PQAs as the ultimate success indicator, while PQLs can be a step on the path to land them. The data shows that PLG organizations realize this, with 17% tracking PQAs.

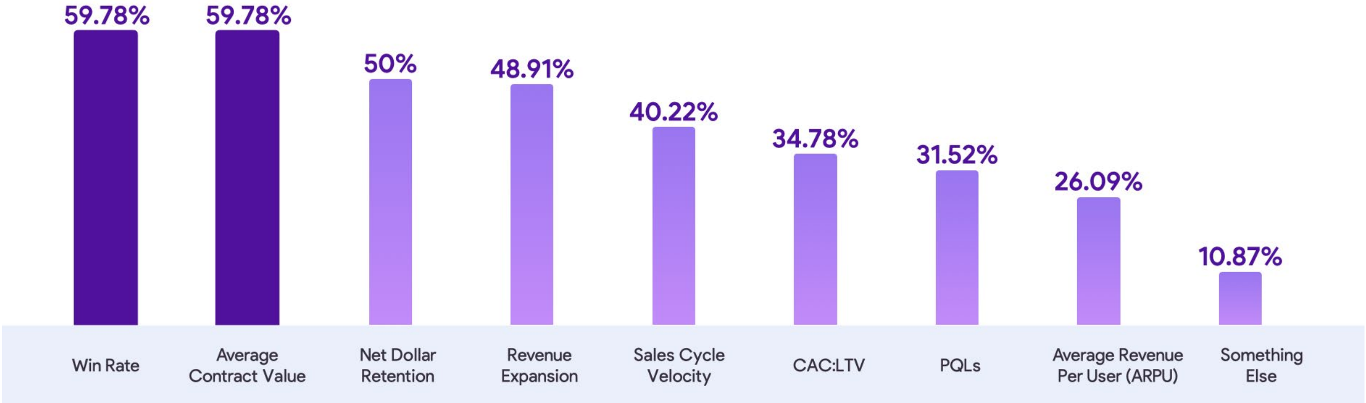
When companies shape their sales motion based on PQAs instead of PQLs, their strategy has room for both end-users and decision-makers, helping companies better define their ICP and provide their customers with account-wide value. Plus, it leads to uncovering impactful data, like at what number of users accounts need sales-assist — so sales teams can get ahead of the opportunity instead of running damage control.

PQLs/PQAs... and then what?

Growth at all costs is no longer the name of the game. Keeping track of acquisition is necessary, but your revenue strategy depends on a complete picture. After accounting for resources spent and churn, you need to know the overall health of your sales motion and inform your plan based on your revenue goals. This focus on profitability is probably why over 40% of folks are looking at NDR... and more should be looking at CAC: LTV.

METRIC INSIGHTS

What metrics do you use to track GTM team performance? (Besides revenue)



*Respondents could select more than one answer

Ping! PLS platforms have joined the chat

The number of companies implementing a PLS platform has more than tripled from last year! While 24% of respondents had plans to add a third-party tool to operationalize PLS, only 2.4% of companies had made the investment. This year 12% of respondents have added a Product-Led Sales platform to their tech stack.

Key takeaways

1. 2022 was the year of Product-Led Sales. With recognition from Gartner and companies hiring for "Head of Product-Led Sales," the category has risen to the top of the priority list for revenue leaders.
2. Hybrid sales motion is the name of the game. Product-led is the way forward, but it's not a zero-sum game. PLS is not a replacement for PLG or outbound top-down sales models. As we've seen throughout the survey responses, it's a complementary approach. Most organizations are experimenting with multiple sales motions and playbooks.
3. Selling SaaS still requires a human touch. Identifying where to give customers a choice to interact with humans remains key. We know teams are thinking about this based on: lead qualification metrics, engagement triggers (i.e., immediately after sign-up or after a hand is raised), and whom they hire (and when).

SECTION TWO

CROs GUIDE TO REVENUE EFFICIENCY

You can pull different levers to improve revenue metrics like CAC, ARR, and NDR. But, where should you start? Should you keep self-serve and enterprise pipelines in the same funnel? The best SaaS companies are thinking critically about ways to do more with less: spotting gaps in the customer journey to maximize revenue from existing customers. In this section, you'll learn about the prerequisites for building a PLS strategy. We'll cover how to structure PLS compensation, how to create the perfect mix of motions for your business, and how to make sure they're working together.

RETHINKING REVENUE: BOTTOM-UP, TOP-DOWN, AND EVERYTHING IN BETWEEN

Matt Bauman

VP of Commercial Sales at ClickUp, former Head of Global Digital Sales at Snowflake and Pinterest, Google alum

Sales is critical to the future success of any company. But, there's more than one way to do sales. Usually an over-reliance on one sales motion (e.g., top-down or bottom-up) can leave millions of revenue on the table.

That's why at ClickUp we decided to layer in a hybrid Product-Led Sales approach, alongside our top-down enterprise motion, and our self-serve flywheel.

Understanding where each strategy complements the others has been instrumental in accelerating revenue.

Read on to learn:

➡️ How ClickUp marries traditional, top-down sales with a modern, bottom-up product-led growth motion.
➡️ How to use data, leadership, and training to inform a Product-Led Sales motion that can become your unique competitive advantage.

The go-to-market motion at ClickUp

At ClickUp, our sales org focuses on three main regions: EMEA, APAC, and the Americas. Within each region, we break our market into three segments — enterprise, mid-market, and SMB. Right now, we're focusing primarily on new business across these segments. Specifically, we've seen success with an expansion motion within the teams and companies that are already using ClickUp.

We take a two-pronged approach to attacking new business:

Traditional top-down sales and marketing

This is for our mid-market and enterprise audiences and entails engaging with leads at field events, webinars, conferences, etc. I won't spend more time here — we're all familiar with this motion.

Modern bottom-up PLG motion

We couple our traditional approach with a product-led growth (PLG) motion where users can self-serve sign-up for our product. In terms of how we find new business in our SMB segment, PLG is at the center of everything we do.

PLG is a competitive advantage to fuel user sign-ups that can serve as top-of-the-funnel lead gen for upmarket customers.

We have a meaningful number of new users who sign-up for ClickUp every day, so there's a rich PLG engine that dictates where we spend a lot of our time. We're always thinking about how to leverage our first-party product usage data in addition to third-party data to go after the right people at the right time with a Product-Led Sales (PLS) motion.

	PRODUCT-LED GROWTH BOTTOM-UP	PRODUCT-LED SALES HYBRID	SALES-LED GROWTH TOP-DOWN
GTM ORG	Bigger marketing team		Bigger sales team
PLANS	Free & paid		Paid only
WEBSITE CTA	Sign-up	Both	Request demo
CHANNELS	Inbound focus	Both	Outbound focus
MARKETING KPIs	Web traffic, sign-ups, product-qualified leads	All	Marketing qualified leads, pipeline
LEAD SCORING	Product behavior + marketing behavior + firmographics		Marketing behavior + firmographics
AVG DEAL SIZE	Lower cost	Varies	Higher cost
TIME TO CLOSE	Time to upgrade or time to close by sales varies		

Source: MKT1

There are two “buckets” of self-serve ClickUp users where we primarily focus:

✋ Hand-raisers

We all know hand-raisers — the folks who reach out via email or fill out a form to talk to sales.

At ClickUp, the majority of the people who raise their hands have already been in the product for a few weeks testing and trying things. From a go-to-market standpoint, hand-raisers are a tool to help us identify high-potential users.

🤫 Silent users

We also have users who are active in our product, but haven’t necessarily raised their hand yet to engage with us directly. These users are good ICP fits and could benefit from doing more with ClickUp.

How do we convert these high-potential users in this category to paid or higher-tier packages? We use our data to tell us where to focus.

Follow this data to identify high-priority leads

For those silent users who don't raise their hands and ask to engage with our team in an obvious way, we look at a combination of usage metrics as well as firmographic and demographic information to figure out who we should proactively reach out to with a PLS motion.

⚙️ Usage metrics

The language will vary based on your product and organization, but we're looking first at metrics around what type of activity they're doing within the platform:

- Do they log in and never come back?
- Do they log in and start to create a task?
- Do they create and complete a task?
- How deep do they go into the product?
- How many people have they added?
- Is the workspace surging?

Then, we look at paywalls.

With ClickUp, everyone has access to the entire platform in our free tier. When they max out the number of free uses for a certain feature, they hit a paywall that's specific to that feature.

Which paywall a user hits is a very strong signal that indicates their value to us as a paid customer, what package would be best for them, what they want to use ClickUp for, how sophisticated their workstream is, and more. All of this informs the potential sales outreach conversation.

👤 Demographic data

Then, we layer in personal demographic data that tells us whether they fit within our core use cases and personas:

- Title
- Role
- Department

🏢 Firmographic information

The final touch in prioritizing which silent users to engage with is figuring out if their firmographic data puts them in our ICP range:

- What is the company?
- What industry is it in?
- Where is the company located?
- What size is the company?

Prioritizing and surfacing actionable data

There's a lot of data in the SaaS space today. But, only certain points actually correlate with a high potential for conversion. Sales leaders are always looking for ways to identify the most high-value data and make it usable for sales teams.

At ClickUp, that process is one of ongoing experimentation.

We look for high-intent signals – the ones we *think* are the right signals to focus on (it is an experiment!). Then, we dive into the account to understand what's really happening. For example, seeing multiple workspaces sign-up on a given domain signals that an organization is evaluating our product, so sales should get involved.

Another signal that indicates an expansion opportunity is a user inviting others. That tells us it's probably not just one person using ClickUp for their own task management, but that an entire team is interested in the product.

We also monitor engagement with our most advanced features, like automations and integrations. This signals an advanced use case, which typically correlates with business teams and presents an opportunity for sales-led expansion.

Sales leadership: A key success factor for PLS teams

To me, the success of a Product-Led Sales team is more dependent on leadership than other factors, like how PLS teams are trained or what type of tooling they use.

Yes, PLS reps may need to be more comfortable interacting with data than traditional sales reps, but at the end of the day their jobs aren't that different.

In a PLS motion, there needs to be a real emphasis on sales leadership, operations, and growth marketing partnering together to work through the data, identify the signals, and build a system that surfaces the most important information and actions to reps. They should not have to go digging for this information.

From a rep's perspective, the PLS motion shouldn't overwhelm them with data and decision-making — it should put wind in their sails. ⛵

Sales reps should always be well researched before they get on a call. The difference with the PLS motion is that the research also involves first-party product usage data, which can make outreach *way* more relevant for leads and impactful for revenue.

How to apply data and training to maximize effectiveness

It's important to develop clarity around which users should stay in the self-serve lane and who sales should engage one-on-one.

There's a two-step flow we use to maximize sales effectiveness at ClickUp:

1️⃣ Lean on data to focus sales on high-potential opportunities.
2️⃣ Apply training to learn from every sales call.

ℹ️ Data

All of the data and systems that we focus on to tell us whether a lead is within our ICP — feature-specific paywalls, intent signals, etc. — also indicate whether a lead requires one-on-one sales support or will thrive in the self-serve funnel.

The first line of defense is knowing if they are an individual user or if there is an organization-wide use case. That determines whether we pursue it as a sales opportunity, which leads to deeper research into product usage signals and account level customer fit data.

📗 Training

A ClickUp value is providing the best customer experience, period.

So, of course, our sales reps are trained to always take care of users and add value, no matter the size of the account.

Every call is a good call, even if there isn't an immediate expansion opportunity. This is because every call gives reps an opportunity to learn about a prospect's strategic initiatives, which can help determine messaging and features to focus on in the future.

How to use pipeline as a leading indicator of revenue

Of course, revenue is the ultimate goal and the core metric for measuring sales success. But since revenue is a lagging indicator of performance, there's one leading indicator of revenue that we really hone in on: pipeline.

We've built a robust structure around leading indicators about our reps workflows that tell us how likely it is that we'll hit pipeline goals.

🔍 These indicators include:

- Number of qualified meetings over the course of a week
- Number of customized demos per quarter
- Average deal sizes in the pipeline
- Number of deals in the pipeline

If reps are hitting their goals across each of these indicators, we typically find that they're also hitting their pipeline targets. And if they're hitting their pipeline targets, typically they're also hitting their revenue targets.

PLS helps get your team to revenue faster

As the lifeblood of your business, isn't it time you modernized your sales approach to take advantage of all that your product and its usage data have to offer?

Empower your sales team to identify and act on high-potential users faster and more effectively than ever before with a data-powered and leadership-approved Product-Led Sales motion.

HOW TO BUILD PRODUCT-LED SALES INTO YOUR ACCOUNT-BASED MARKETING STRATEGY

Ben Pollack

Head of Growth Marketing at ChartHop and changemaker helping unite marketing and PLS motions

The Product-Led Sales motion can empower entire go-to-market teams to drive revenue with the help of product usage insights.

But what if you already have a robust go-to-market motion and need to figure out if Product-Led Sales is right for you or how to work it into the mix?

Here's the secret: Product-Led Sales can be an integral part of the go-to-market strategy for *many* businesses — as long as it makes sense from a product-market fit perspective.

In this chapter, I'll guide you through how to tell if Product-Led Sales is right for you and, if it's a fit, how to implement it within your existing go-to-market engine to power growth.

Prerequisite for Product-Led Sales: Product-market fit

Before you can jump into whether you need Product-Led Sales or not, you need to first make sure you have this key pre-requisite - product-market fit.

Product-market fit describes how well your product meets the demands of your target market.

Let's break that down:

1️⃣ Get to know your target market: Create an ideal customer profile (ICP) that personifies your target market to understand how your product meets their unique needs.

2️⃣ Understand how your product aligns with ICP needs: Can your target ICP easily understand the value of your product (messaging) and how to use it (adoption)?

You can't successfully stand up a PLS motion without PMF.

If you want to launch a self-serve path for your customers, there needs to be tight alignment between your ICP's problems, the solution you offer, and their ability to quickly adopt that solution without sales touches.

If you have this product-market fit that allows for a PLS motion, here's how to implement it into your GTM motion in 3 steps.

1. Create a marketing strategy that can support PLS

Organizations should never do Product-Led Sales in a vacuum. You need to apply it across your entire go-to-market motion. It has impacts on every team and strategy. Let's start with the foundation - marketing strategy.

Start with first principles:

- Assessing your ICP fit
- Understanding the account's existing product usage
- Uncovering the right personas in that account that have pain points that you can solve

Then, use all that data to target prospects effectively across as many marketing channels as possible.

This is the ultimate flow of a PLS-supporting marketing strategy:

- Understand the account.
- Understand the message that speaks to them.
- Get the pulse of every contact in that account that's relevant for you.
- Market to the audience accordingly.

For PLS to work, you must become *intimately* familiar with two core marketing functions: demand generation and growth.

🔈 Demand generation drives awareness and demand for your product with your target audience.

DEFINITIONS

Demand generation: the motion of driving awareness and demand for your product within your target audience.

Growth marketing: the motion of optimizing the full customer journey for more efficient funnel metrics.

📈 Growth marketing is how your systems and all of its pieces play together.

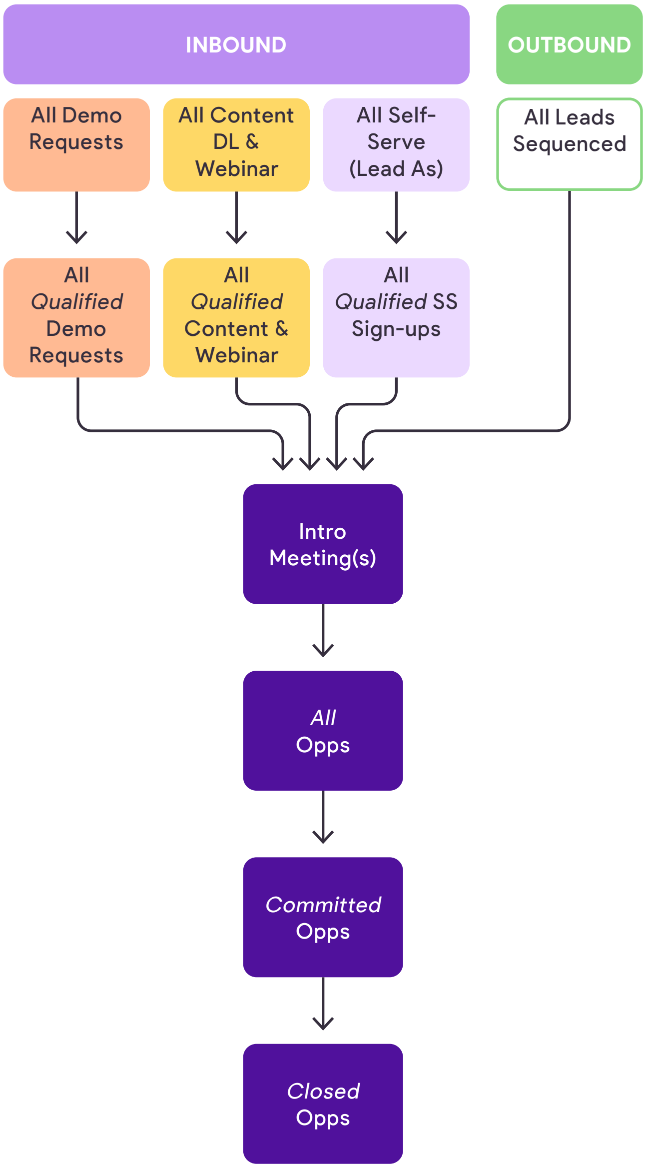
With demand gen, the paid team will stand up ads or content to specific accounts that are warm from self-serve. Then the growth marketing team, under which demand gen sits (and where Product-Led Sales may also sit), will ensure the communication between systems is dynamic and always on.
In practice, this means making sure the data pipes between your marketing tools, advertising platforms, and CRM work together.

2. Add a self-serve funnel

Most marketers know how to create a journey to nurture prospects and accounts. These journeys are typically built from marketing-led channels like webinars, content downloads, ebooks, case studies, etc.

But you can *also* create a journey through a self-serve product.

Your goal as a PLS marketer is to create as many user journeys as possible — both inbound and outbound — through which you can engage prospects. A big caveat for PLS is thinking both at the prospect level and account level. As you build these individual prospect journeys in parallel you should create account level journeys. You should be measuring and scoring how multiple prospects from a single account behave as a whole within each journey.



Demand-gen marketers typically want to push folks to request a demo. But, sometimes, users just want to see or try the product first. So, it's best practice to build multiple journeys that allow prospects to choose their own adventure. A great way to improve conversion rates is by adding a journey for a trial or interactive demo alongside your classic "hand raiser" demo request.

By building multiple journeys, you create more touch points and data for your go-to-market team to better understand prospects.

3. Operationalize high-intent signals from self-serve

So, you've got product-market fit, added a self-serve motion for prospects, and now it's time to build the motion for sales to engage.

The self-serve motion may be one of your strongest intent signals of all, but how you approach these accounts looks very different from your typical sales-led motion.

At ChartHop, I created an 'Intent Signal ABX' framework, a play on Account Based Marketing, but where the X stands for all functions on the go-to-market team like sales, customer success, or even ops. In this model, we operationalize high intent signals and aggregate them to the account level. High intent signals could be from self-serve product usage (invited their team) or another high intent marketing action (pricing page visit). This signal then gets operationalized downstream in our digital ads and outbound messaging.

To summarize the model, here's how to put your self-serve motion to work:

- Define what makes an account ideal for you (product usage, ICP-fit, other intent signals).

INTENT SIGNAL ABX

1. Define accounts

What makes an account *ideal* for us?

2. Third party data push

How can we identify in *SFDC?*

3. Digital advertising

How do we target *digitally*?

4. Sales outreach

How do we target via *Outbound*?

- Figure out how to get this information in your sales and marketing systems.
- Operationalize and act on it — actionability is something I've found Pocus helps with.

We use this model to proactively drive our growth marketing engine. By understanding the types of accounts that show high intent we can use that data tune our scoring models, outbound campaigns, paid ads, and more.

EXTRA RESOURCE

A note on account scoring: Product-qualified accounts (PQAs) and product-qualified leads (PQLs) are different.

A PQA is a company or account that's qualified based on the aggregate usage from individual users, ICP fit, buying intent, and other important signals.

PQLs can be a stepping stone to PQAs, but relying on them alone to run expansion or consolidation playbooks is less effective. Instead, a PQA framework with specific account-based triggers gives sales teams the data they need to make convincing business cases.

Learn more

Example: Scoring using PLS data

To score using PLS data, first we define firmographic parameters:

- Location
- Industry
- Number of employees
- Etc.

Then, we assign scores based on different attributes

- Headcount growth
- Product usage
- Intent to buy — based on keyword searches or G2 activity
- Funding
- Geography
- Industry
- Self-serve data
- Other first-party data

How PLS empowers holistic GTM motion and growth

Despite having "sales" in the name, Product-

Led Sales is not meant to be done in a silo with the sales team. PLS is just one motion that is part of an overall strategy you build for an account segment.

You can take PLS maturity to the next level if you think about it more holistically. Get the marketing team driving tactics based on the same data set as the sales and customer success team to ensure each journey complements the other.

The modern approach to B2B marketing understands the account as a whole, and Product-Led Sales can be pivotal to that.

For example, we have a business that launched a free product and got 1000 sign-ups on day one.

In a Product-Led Sales *only* world, we would contact all users and try to qualify them. With a lot of time and a lot of work, we may close a few deals before giving up on the rest and moving on.

That's fine — but it could be *way* better.

Instead, you could bring together your whole GTM team to immediately qualify or disqualify all 1000 sign-ups.

Here's how that may look:

- RevOps builds the scoring models.
- Marketing spins the self-serve flywheel.
- Sales actions PQLs/PQAs, spots patterns, and refines segmentation.
- Customer success informs the product roadmap.

Time saved: 100 hours.

Now, let's say that 30% of these new users are qualified.

Unless they raise their hands, we'll leave the other 70% of unqualified prospects alone. And of those 30% qualified, we know the majority aren't going to convert immediately, so they can be passed to sales to work. Non-converted accounts can be automatically pushed to marketing to nurture further before they can be handed back to sales.

This data can then be fed into your marketing strategy to optimize market segmentation and messaging. Help your BDRs refine their outreach, dynamically change paid ad tactics, etc., based on PLS motion data.

This unified process separates orgs that do holistic Product-Led Sales from those that do product-led growth only.

Tactics: How to leverage self-serve to drive demand gen

Marketing

Someone signing up for self-serve has signified that an account is warm. When an account is warm, you want to serve relevant digital ads. Then layer other touches like bespoke field events, invite them to your community, or serve them highly personalized content.

Doing something like this requires automation at scale. Unless you want to manually update CSVs daily to keep your funnel data in sync with ads platforms and outreach tools, you need to build a dynamic connection between your sales and marketing systems and your paid ads platforms.

The logic may look like this: Based on the funnel stage of the account, if self-serve sign-up is true, then target relevant personas with this type of case study to get them more social proof.

This is also when you would want to do outbound sales to users in the account who haven't signed up yet because it's all about tackling the account *as a whole*.

For example, if you see a junior VP sign-up via the self-serve motion, you would want to target the executive who hasn't signed up next, using ads. That's outbound from a holistic perspective.

Sales

From a sales perspective, it's all about automating how you get valuable high intent data about accounts into the hands of your team.

At ChartHop, we have built workflows internally to surface product usage data to our reps in Slack. So as soon as someone takes a valuable action in the app, our rep knows and can measure the account, as a whole, to see what's going on before they reach out tactfully.

Our goal is to put sales folks in a position to succeed based on dynamic data. We automate everything until they hit the send button because we want reps to always use discretion.

> "The modern approach to B2B marketing is understanding the account as a whole, and Product-Led Sales can be pivotal to that."

For example, someone might take action, such as syncing data in ChartHop. That's a signal that we'd want to tackle this lead thoughtfully. If the BDR went in without understanding the account, they might miss that an AE is already working with them. If they had gone charging in, they could have sabotaged the deal.

Of course as you build more complexity into your Product-Led Sales motion you can also use tools like Pocus to surface this valuable data to your teams.

Level up your GTM motion with PLS

Suppose your product and target market are a good fit. In that case, there's no time to waste adopting a PLS strategy to generate growth *holistically* — and leveraging the self-serve motion to drive demand.

PLS COMPENSATION BEST PRACTICES

David Barron

Global Director of Sales at HubSpot who's always experimenting to build out the best projects, teams, and products

CLICK HERE TO RETURN TO THE TABLE OF CONTENTS

While the definition varies depending on who you ask, and continues to develop as the motion matures, I think of Product-Led Growth (PLG) as a go-to-market (GTM) approach that leans on the product to impact critical revenue factors like expansions, conversions, upsells, etc.

Some might read that and think “Say goodbye to sales teams!”

But I’m here to explain that’s not the case *at all*.

It’s a myth that sales is not relevant in the PLG approach.

In reality, sales is a pivotal element of most GTM teams — and can actually *accelerate* the PLS flywheel when set up thoughtfully.

Which is why, in this article, I’m going to talk about how I see sales ramping up and getting compensated fairly at each phase in this cutting-edge GTM approach.

What early sales goals look like in a PLS motion 🥅

Some may be surprised to hear me say this, but revenue shouldn’t be the main goal when you’re first setting up sales within a PLG GTM motion.

Starting with strict revenue incentives can stunt your growth prematurely. Your team will prioritize hitting their quota because that’s what they’re being incentivized to do, rather than experimenting with different tactics, usage signals, and playbooks to optimize and scale your revenue potential later on.

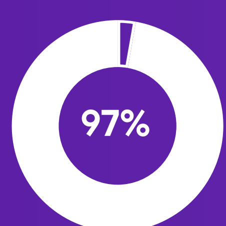
If your team’s very first goal is “drive X dollars of revenue per month” and they hit that, the number and tactics used to reach it may become their ceiling.

Instead, I’d like to see a Product-Led Sales team’s first goal be building a repeatable, scalable process.

And, realistically, this process could take six, eight, or even twelve months!

Which leads me to my next point — how to incentivize experimentation along with revenue generation via phases of sales compensation in the PLS motion.

DATA



97% of PLG companies either have or have plans to adopt sales on top of PLG

The 3-step path for PLS compensation

The traditional sales model of jumping right into individual quotas doesn't work in a product-led environment. This is because experimentation is pivotal and the whole GTM team is involved (instead of a single sales person).

Here's the path many product-led companies can take to successfully compensate sales as they establish the structure of their PLS motion.

1️⃣ First phase: The Draw Compensation Model

What we did at HubSpot, and what I believe is best practice when building a PLS motion, is set up a draw compensation model. This is a particularly good model for early stage sales teams that are building out their sales playbooks for the first time.

A draw compensation model pays out an advance on variable compensation to a sales rep. It's an advance on expected future commission.

For example, we used a draw model in the early days of selling the Hubspot CRM. Account executives were working toward the same goal and getting paid the same amount for that effort. Given we were learning how to sell a CRM for the first time, we had team goals like "sell 50 seats this month" - but, we were paid 100% of quota whether or not we hit that goal.

In this model, incentives were culture-based. If we hit our 50% mark, the team would go out for a nice team dinner. If we exceeded our "quota," we'd win another team reward. This was both incentivizing and culture-building, and quickly became ingrained in our culture: win as a team, learn as a team, celebrate as a team. These non-revenue-based rewards helped to set a performance expectation for every person that we hired.

> I'd like to see a Product-Led Sales team's first goal be building a repeatable, scalable process.

Even today, our new reps get paid on the draw model during their first few months at HubSpot.

WHY START WITH THE DRAW MODEL IN A PLS MOTION?

Why do a draw model instead of individual quotas?

Here are the main benefits:

Experimentation

The draw approach gives sales orgs the room they need to experiment - you're not going to nail the quota for a new team with an unproven playbook.

There are two benefits: (1) leaders can observe performance and adjust sales quotas up or down (2) sales teams feel less pressure to hit a specific quota and can more easily experiment with their playbook.

For example, we talked about engaging your ICP earlier. This phase is ideal for figuring out who that ICP is, at which points they want to work with sales people, where they prefer the flow to be more self-serve, the unique product usage signals that show they're likely to convert, and so on.

Learning and documentation

The draw model gives sales leadership space to build the foundational training, documentation, and repeatable playbooks for future reps.

SIGNALS YOU'RE READY TO MOVE ON FROM THE DRAW MODEL 🚦

When building the HubSpot CRM sales team, we kept reps on draw pay for over half a year.

When did we know our sales team was ready to move to a team quota compensation method?

When we had developed a repeatable process to close a CRM deal, which looked like:

1. Rep received a product-qualified lead (PQL) of an ICP
2. Rep quickly knew how to run discovery and the next best step
3. Rep could quickly close the deal

In the draw stage, you put the outside of the puzzle together. In the team quota stage, you're filling in the middle and completing the picture.

2️⃣ Second phase: Team Quota Comp Model

After 9 months with this approach and when the sales team was 8 people, we moved everyone to the traditional individual quota system. But, looking back, I would add in team quotas as a stepping stone before individual quotas. This encourages teams working together to drive an outcome.

A team quota model, is exactly as it sounds, the team has a shared quota and the team's performance against that quota will determine the variable compensation. For example, if the team's quota is $1,000/month and the team delivers $1,500 that month, everyone gets paid 1.5 times their variable rate.

🚨 This comp model works best for sales teams working with inbound leads, PQLs, and PQAs. It likely wouldn't be the right incentive for a sales model that requires a heavy outbound component because of the individual effort required to prospect an outbound account.

For me, this stage is about scaling up from the foundation you've built. You already saw how your team performs with a small number of people, so now you're creating demand and a forecasting model. You want to accurately predict your revenue uplift when you add X amount of salespeople.

SETTING THE RIGHT QUOTA FOR YOUR TEAM

To determine the team quota, start with the 'expected' productivity per rep (PPR). The sum of your PPR based on your number of reps will determine the quota you should set. For example, if you have five reps and you expect they can hit 5k per month, the team quota is thus 25k/month.

Basing your team quota on expected PPR is important because it allows you to still have a 'stack rank' of reps, as well as institute performance management for those not hitting their expected numbers.

WHY IMPLEMENT TEAM QUOTAS AT ALL?

Why do I recommend *not* skipping team quotas as product-focused companies layer in and ramp up their sales teams?

It's a powerful stage for a few reasons.

Decrease time to ramp for new reps

As you begin to increase team size, tenured reps are incentivized to onboard new team members.

Why?

Because training and upscaling new reps means *everyone* makes more money. It's as if the whole team is now sharing the same tip jar. My current team works based on a team quota model and we've seen time to ramp decrease for each new rep we've hired.

Leaving room for experimentation

As we've certainly covered, experimentation is *so* critical in a PLS motion. And team quotas leave room for this key element. The team has space to change processes, try new tactics, take time to learn, and so on. The team will be able to continue to evolve and get better — all while still driving revenue.

Efficient demand capture

In a team quota model, you can choose to rotate demand based on tenure and skill set. On individual quotas, you don't have that ability. Without that rotation flexibility, you may come up against situations where you have a mismatch in buyer need and salesperson skill set, resulting in lower close rates.

TAKEAWAY

In the draw stage, you put the outside of the puzzle together. In the team quota stage, you're filling in the middle and completing the picture.

SIGNALS YOU'RE READY TO MOVE ON FROM TEAM QUOTAS (IF EVER) 🚦

To be honest, some PLS teams may never need to move on from this comp stage to individual quotas.

With my current team where we only sell recently launched HubSpot products (HubSpot CMS, Service Hub, and Operations Hub), I thought team quotas would stop working for us around 20 hires. Instead, it's gotten *more* successful as we've scaled.

Seeing it in action, I think this could likely work for teams of 50 or even 100 salespeople — with a bit of segmentation.

Right now, my global team is all working on the same team quota — aka the same tip jar.

I imagine that instead of moving to pure individual quotas, we could find success giving each region a team quota. So the U.S. team would have one quota, the EMEA team would have another team quota, and so on. About 70% of each region's "tip jar" would be filled by that individual region and the other 30% by the global team as a whole.

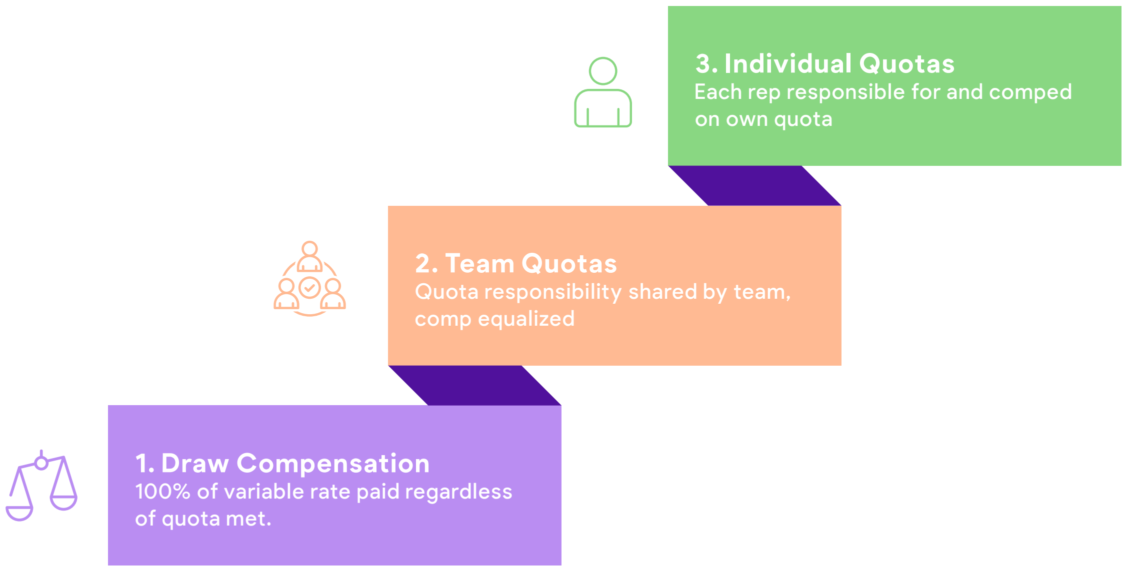
By splitting the variable into two portions, we should be able to increase momentum and raise quotas in each region while still maintaining the unifying culture that comes from team-based quotas.

And this doesn't just work if you have multiple regions. It could also work for teams that are large enough to work in different territories. If this is where you find yourself, think of this as step 2.5 in your path through PLS compensation stages.

While you may never "break" this model and need to progress beyond it, there is still a case for moving on from team to individual quotas.

If you find yourself needing to supplement your PLS model with a true enterprise sales motion, you may be ready to move to individual quotas. This is mostly because the salespeople you bring in to tackle that upmarket motion will likely be more traditional reps, and will therefore be more incentivized by individual quotas.

PLS COMPENSATION PHASES



3️⃣ Third phase: Individual Quota-Based Compensation

This is the approach most traditional sales folks will be familiar with.

With individual quota compensation, an account executive's pay is part base salary and part variable salary, which depends on what percentage of their quota is hit. In my opinion, this approach makes the most sense at a certain scale, and still then may only need to be applied to enterprise sales teams.

In these cases, a degree of individualized outbounding and handholding is expected to close decision-makers who may not engage with the product regularly. There's an obvious individual effort, and therefore individual reward, that makes this comp model more common in traditional sales.

Ending thoughts: Make sure comp goals align across GTM teams

Often in a Product-Led Sales approach, many teams — customer success, product, marketing, etc. — intersect to influence PQL acquisition, conversions, upgrades, and expansions.

This can cause internal friction if each team has wildly different compensation models.

Think about it. What if the sales team is comped on cross-sells, but customer success isn't at all? Customer success would never surface leads back to sales because they wouldn't have any incentive to do so.

This is why it's important for GTM teams to have individual comp structures that are still aligned with a singular North Star Metric. In some seasons, that could be new revenue. In other seasons, that could be cross-selling and upselling. All comp models across GTM teams should be adjusted to align with one main goal.

Follow the path to successful PLS implementation

Especially for those coming from the world of traditional sales motions, it can be hard to see the reason for any other compensation model than the individual quota one that's been relied on for so many years.

But when the motion shifts, so should the compensation behind it to ensure you're incentivizing the right actions at the right times and motivating your GTM team toward the right goals.

I hope I've illustrated how important it is to explore team-focused pay structures when adopting a team-based sales approach like Product-Led Sales — whether or not your final form incorporates an element of the individual quota approach.

SECTION THREE

OPERATIONALIZING PLAYBOOKS

A PLS playbook is a way to organize and operationalize your go-to-market motion.

Playbooks operationalize the who, what, when, and how of Product-Led Sales. Each Playbook has a specific goal and a set of tactics your team can run to get closer to that goal.

Simply surfacing PQLs and PQAs is not enough. The most successful companies rallied their teams around specific goals and clear workflows for achieving those goals.

This section covers the most successful playbooks, in the words of the experts running them, along the product-led spectrum — from organizations leaning towards sales-led to companies that are mostly product-led.

SELLING TO DEVELOPERS IN A NEW ECONOMIC CLIMATE

Francesca Krihely

Former Senior Director of Developer Experience at Snyk; MongoDB alum; and lifelong learner of all things developer tooling, marketing, and community building

Having sold primarily to developer audiences over the last decade, I deeply understand the special approach required to sell to engineers.

Lately, I've seen an interesting shift among my colleagues who aren't selling to developers — they're increasingly deploying developer tool sales strategies.

This is because, with the explosion of product-led tooling, buyers and users are shopping more and more like developers. In other words, every type of user and buyer (not just engineers) do not appreciate the aggressive sales motion with lots of cold outbound. In addition, the economic environment has put even more pressure on GTM teams to improve the effectiveness of their outreach strategies. Sales teams - regardless if they're selling to developers or other audiences - need to be much more data-driven and personalized in their messaging.

So in this chapter I'm sharing my best practices for selling to developers and, really, all audiences that are becoming increasingly more difficult to reach.

NOTE

WHAT TO KNOW ABOUT SELLING TO DEVELOPERS

One reason developers are difficult to sell to is that they don't respond well to interruptions to their time.

Why?

It's the nature of their job.

The actual tasks they're doing day-to-day often require long periods of focus. Context switching negatively impacts developers in a way that is less severe for other buyers.

Why developers are different than other SaaS buyers

Yes, selling to developers *does* require a different angle than selling to other personas.

But, that's not to say that developers are some kind of strange outlier in the SaaS world. Every group of buyers requires a unique approach if you're going to be successful in selling. That said, reaching developers is all about understanding their needs and motivations when it comes to technology purchases.

When you consider that, it makes sense that they can't make time for sales calls.

Another unique element is that developers often work on projects that are directly tied to revenue. They are building new revenue streams or optimizing existing ones. So, if they do make a misstep, like choosing the wrong tool in their stack, the impact can be catastrophic.

> If marketers can think of every buyer this way — consider what their day-to-day looks like, their responsibilities, and their core problems — they can drive interest and attention from buyers in spite of economic hardships.

That's why developers tend not to trust any products right off the shelf. They want to know a product is high-performance, secure, and feature-robust. They're, understandably, skeptical.

Knowing this, it's easy to see why the PLG motion works really well for developers. It gives them a chance to test out software and see and believe for themselves that the product solves their core problems. They can't just rely on marketing messaging the way some consumers can.

If sellers and marketers can think of every buyer this way — consider what their day-to-day looks like, their responsibilities, and their core problems — they can drive interest and attention from buyers in spite of economic hardships.

How a dev-focused PLG motion can help enterprise sales

To expand on the benefits of the PLG motion in selling to developers, I want to talk about the concept of the "dual-track" sales model that's becoming more widespread across SaaS.

This model incorporates both the self-serve PLG motion as well as the enterprise sales motion, side by side.

During my time at MongoDB, I was lucky enough to experience the adoption of a self-serve offering, which eventually grew to make up more than 50% of the revenue for the business.

The reason this works especially well in the developer tooling space is because you can have developer adoption on the self-serve side all done via credit card purchases. With this audience and an effective self-serve flywheel, you can build a *huge* customer base within an account before you ever need to take an enterprise sales approach.

DATA

Self-serve offering eventually grew to make up more than 50% of the revenue for the business.

This is so powerful because you've already done the developer selling — *without having to actually sell.*

You can then save your energy and resources for when it comes time to pitch the product to senior leaders who are looking to optimize processes and solve problems in a way that is beneficial to the business. Once you already have leadership's attention through massive developer adoption, it's easier to have those conversations. Especially with a good story, leaders are often more receptive to the sales pitch than developers who are head-down trying to get a list of tasks done every day.

This isn't a brand new approach - some developer platforms have been using a similar model for years. However, we're seeing it become a lot more common. And that's in large part because it works especially well within budget-conscious environments.

Creative tactics to sell to developers

Oftentimes end-users will show interest in the product, but are being constrained from purchasing tools outright (especially in 2023!). So, I have to find new ways to nurture users towards a purchase, or enough that they take the time to surface the product to decision-makers.

Here are the tactics I've been advising to others.

Freemium, but make it time-based

Freemium pricing usually gatekeeps the more advanced features of a product. But there's another way to approach this pricing model — base it on timing vs. features.

Why not come right out of the gate with a really high-value offering, or access to your entire product, for free — or at a super low cost?

Take some time to build up a base of rabid fans that way. Then, when the economic forecast shifts up or your customer's situation improves, begin the process of raising your price.

Go where the developers are

Part of the job for developers is to be inquisitive. Because of this, they're always trying new tools and discussing new systems. And there are a lot of environments in which developers engage on a regular basis that facilitate this learning.

Some of these environments include Stack Overflow, GitHub, hackathons, and conferences.

You want to be in these environments, making your product known via community building, awareness marketing, and soft selling tactics. Make sure your engineers or developer relations team are part of these communities and adding value by sharing tools, skills, and strategies to solve developer problems.

NOTE

Have your ICP really dialed In

Some products are going to attract folks who aren't necessarily part of your ideal customer profile (ICP). For example, MongoDB makes it easy for developers to build apps on its platform, so we saw a lot of developers trying it out for fun, but not necessarily looking to buy it anytime soon.

With a product like this in the current economy, you need to be sure about the group that will actually buy your product and if they are worth spending sales resources.

Especially for startups, because of your budget and size, you need to have a lot of constraints around who your economic buyer is and when is the best time to reach out.

That all requires data — go-to-market teams need to invest in tools that help you analyze, prioritize and action data easily. At Snyk we set up triggers for usage spikes. On top of that, a tiered engagement model determines which closed/lost accounts merit re-engagement from sales.

We also lean on product usage data for ICP discovery. We know our ideal customers have a powerful programming language or tech stack, which in some cases we can ascertain based on their interactions with the product.

Competitor takeouts

Look for compelling events to compare yourself to competitors where you know you're going to come out on top.

These so-called "competitor takeout" campaigns can help you stand out in your niche by capitalizing on relevant events.

Here are some events to keep an eye out for that may signal a competitor takeout campaign is the right approach to attract developer eyeballs:

- One of your competitors retired an important or well-known piece of software.
- One of your competitors had something bad happen, like a data breach.
- Your company launched a feature that outperforms a similar feature from a competitor.

Shift from end-user ➡️ economic buyer

When you're a developer tool, your end-user is normally not your economic buyer.

As macro economics take a bad turn, more senior decision-makers (including CFOs)are looped into important buying decisions.

Most PLG products have done super well up until now because they've been so end-user focused. But, when these companies realize that in order to get to the next level of revenue they need to win over economic buyers, they end up at this huge chasm. Sellers are caught between end-users and the economic buyers and they just don't know how to bridge the gap.

Enterprise: lean on sales

When it's no longer about appealing to developer-specific pain points, it becomes about appealing to the needs of the business.

That means your product, but even more so your sales reps, need to be focused on solving "hair on fire" corporate problems. Sales needs to know and appeal to that economic buyer's pain. They need to be able to lay out compelling use cases that speak to the business.

When shifting from speaking to the end-user to speaking to the economic buyer during an expansion attempt, sales can also tap developer relationships within the account to gain intelligence about what's going on in the company.

Really good sales teams will have reps who are great at asking the questions that uncover the company's true priorities. And then, using that information, get introductions to the senior people they need to win over.

Playbooks for successfully engaging economic buyers

Below are specific playbooks for getting the conversation started with economic buyers.

Product-qualified account (PQA)

First is a Pocus playbook I've found great success with: The Product-qualified Account.

At Snyk we first identified an account with a large group of free users. Then, we looked for a security team member who is in a buying position at that company and approached them saying "hey, did you know you have X number of developers at your company using our free security tool?"

This gets their attention in two ways:

1. It calls out some shadow IT adoption they might want to look into.
2. More importantly, it makes a powerful first impression of our product because most developers don't want to adopt security tools.

A play like this can be tweaked to work for a lot of different software in a lot of different contexts.

Expansion from self-serve

With expansion, you are looking for leading indicators from product usage data that tells you an account is ready to grow.

When you spot an ICP that has all the purchasing intent signals, it's time to reach out with a message like "we're glad you're already finding value with our self-serve product". Then, see how you can help them adopt more software or expand usage across their department or entire business.

This play works especially well with a specific type of salesperson who's more technical and has a lot of deep product knowledge. In this situation, your sellers almost become a customer onboarding professional.

Especially for more complex products like developer tools, I predict this role will become more standard in PLG organizations. It's a great stepping stone to start in this technical onboarding or sales-assist role and then graduate to account executive.

Keep winning with developers and other decision-makers

It's important to have a strategy in place when selling in the developer space.

But in today's economic climate, it may be even more important to layer on top of that the knowledge of how to target economic buyers who are safeguarding company budgets more than ever.

Take these strategies with you to help your team resource accurately and build the playbooks that close sales.

MOST SUCCESSFUL PLS APPROACH FOR DEVELOPER TOOLS

Sam Richard

Head of Growth at ngrok and OpenView alum with experience growing self-serve and product-led growth motions in the SaaS world

With millions of developer users and tens of thousands of paying customers, there's no denying that our self-serve motion at ngrok is highly effective.

And while it may seem counterintuitive, that makes it perfect for a Product-Led Sales (PLS) motion.

With PLS, our sales team relies on actual product usage data to drop into high-potential opportunities where they can add value, discover new use cases, and move customers to paid or higher-tier plans.

For all the other product-led growth (PLG) leaders out there who are experimenting with ways to grow their businesses with help from a PLS motion — here's what I've learned so far:

- How GTM evolves as sales and marketing scale up
- Where I envision sales as part of the PLG motion
- The PLS play that has been the most successful for us at this stage
- How to update the sales approach to be inclusive of the perceived "mysterious" developer buyers

> Our sales team relies on product usage data to drop into high-potential opportunities where they can add value, discover new use cases, and move customers to paid or higher-tier plans.

The evolution of the go-to-market motion at ngrok

The ideal customer profile (ICP) for ngrok before Series A funding was developers who needed to get something online quickly in the development process. Today, we're keeping that ICP but reorienting ourselves around the jobs to be done for those developers. With ngrok, users can connect to remote devices, connect to a service that's difficult to get to (like Kubernetes), verify and protect traffic to something they've built, and more. This focus on "jobs to be done" aligns more closely with solving teams and businesses' pain and irritation around getting products on the internet.

Currently, all of our users come inbound organically. This happens most often because we're embedded in documentation for other products, and developers teach other developers to use ngrok in the course of pair programming.

For example, when a developer builds something using Stripe's APIs, they still need a way to get it online. So guess what Stripe recommends in their documentation? ngrok.

This is why our primary growth channel, and overall best growth driver to date, has been organic discovery ➡️ self-serve adoption pipeline.

There are a few things that have made self-serve work crazy well at ngrok:

NOTE

CORE ELEMENTS OF SELF-SERVE ADOPTION AT NGROK

End-user focus: Our buyers are primarily also our end-users — that means everything we build, from onboarding to pricing, can be focused on the end-user, simplifying the sales cycle.

Usability: Of course, the fact that developers can hop right in to try and buy the product without any setup from sales or support is huge for self-serve adoption. I can't imagine selling tools to developers that required sales intervention.

Momentum: Having an intensely loyal base of engineers who regularly use and share our product has given us a lot of momentum to keep growing. We built that base by focusing on reliability alongside self-serve usability.

To be honest, I know that our fully organic, mostly inbound, growth approach can sound a little messy — like we're just throwing spaghetti at a wall and seeing what sticks. We've never attempted to "grow" our demand outside of experimenting with new messaging and partnerships. No one outside developers has heard of us, yet we get thousands of daily sign-ups. I think that speaks to the importance of being discoverable by your end-user and cutting through the noise of what you "think" marketing and growth should be doing because you see other startups doing it.

While this organic approach has worked thus far, repeatable acceleration is what we're interested in now. For us, that means getting laser-focused on growing the pool of engineers that ngrok can solve problems, i.e., the jobs to be done I mentioned above. That's why we're in the process of growing our sales team as well as building out a marketing function.

As we do so, I'm interested to see how our discovery and growth channels change and evolve. I anticipate implementing a wider product marketing and brand awareness approach.

EXTRA RESOURCE

Learn more about building ngrok's sales team from Pocus' AMA with CRO Ben Sabrin.

Using your Product-Led Sales team as expansion "sherpas"

In our current GTM motion at ngrok, sales doesn't typically engage with a user until *after* they've already converted on their own. They get involved mostly in three cases:

- ✋ When a user raises their hand for a production use case
- ⌨️ When a specific feature is used that correlates to a production use case

📈 When an account is growing rapidly and hitting limits within the product

Otherwise, sales doesn't focus on first-time buyers. They don't really need to. It's not a hard sale because our price point is reasonable. This is probably the case for many primarily product-led orgs.

Instead, our sales team focuses on the expansion after the land. They want to get into a production use case and move beyond scattered users and teams to get up to the decision-making echelon of the company.

This is why we think of sales as "sherpas." They're guiding the original team that brought ngrok in for a project to help that team build a solid business case. Then, that team can help sales drive expansion to the rest of the organization.

ngrok's most successful dev tool PLS playbook: Production-Scale

Our most successful playbook for selling to developers is one that focuses on production-scale end-users.

When do we use it? We use this playbook any time an end-user is signaling that they intend to use the product for a production-scale project.

The goal? The goal of this playbook is to understand the motivations of individual developers. We want to uncover things like:

- Do they have a project that they need to get online quickly?
- Are they building their own startup app and need to know best practices?
- How can we help and educate them?

What are the primary signals? Traffic and usage increases are the primary signals that tell us a user is ready for a sales or marketing touch. That does change from time to time, depending on the use case. For example, with a device connectivity (IoT) use case we start outreach earlier.

The result? Using this playbook to look at only traffic pattern changes, we were able to identify a dramatic upswing in usage for a specific user with a public email domain. We found out that this user was actually a consultant for a major coffee chain, and now we're in deep sales conversations with them.

GTM teams can run multiple playbooks depending on their product, user segments, revenue goals, and other factors.

The graphic below provides an overview of the five PLS playbooks Pocus customers see the most success with:

Playbook	Description	When should you run?
Expansion	Increase your footprint within an existing account by adding seats (within existing team, new use case, etc.)	If you have strong footholds within strategic accounts where there is a large upside to increase seats or usage.
Free to Paid Conversion	Convert your base of existing free users to paid customers.	If you have a strong self-serve flywheel that brings in a high volume of free customers, use this playbook to uncover the best opportunities for conversion to paid.
Upsell to next pricing tier	Upsell customers from lower tiered plans on the next plan up or with add-ons.	If you have a strong base of customers on your least expensive tier that are consistently hitting or going above their paywall limits.
Enterprise Consolidation	Find and consolidate the pockets of usage sprinkled throughout a large customer.	If you have a large amount of enterprise accounts with multiple disparate workspaces.
Churn Prevention	Catch customers at risk of churning.	If you are seeing an increase in churn within high value accounts.

Selling developer tools doesn't have to be mysterious

One final thing to address is the notion of developers being difficult or somehow mysterious to sell to. 🧐 I love marketing/selling to developers because you get critical feedback very quickly.

The problem isn't that selling to developers and their teams is much different than selling to any other SaaS buyer.

The problem is that the way we approach *every* SaaS buyer is outdated.

Yes, it's true that most developers like to explore a product on their own first. They'll raise their hand and want to talk to someone when they run into a unique use case or have a very deep technical question. We then consider their needs and pain points, as well as those of their team, and change our messaging depending on who we're speaking to.

However, pretty much *all* buyers are like that.

When you're shopping for something — online or in-person — do you really want to talk to a sales or support rep right away? I know I don't unless I have an actual question or need help.

The issue in SaaS sales, in general, is that we don't treat SaaS buyers as consumers, which is a huge failure.

So what we practice at ngrok, and what I think any org with a PLS motion could use, is patience when sales is communicating with end-users and buyers. We also try very hard to gather context on product usage and use cases before ever reaching out.

Nothing lands worse with a developer — or any SaaS consumer, for that matter — than a bland, generic, or invasive sales pitch.

SUPERHUMAN'S PATH FROM B2C TO ENTERPRISE

Gaurav Vohra

Head of Growth & Analytics
and founding team member at
Superhuman, investor, and advisor

The perception of Superhuman is that it instantly went from the spark of an idea to viral success overnight.

But there has always been *much* more behind the scenes.

There's so much content to unpack that I've split this into two chapters. In this first chapter, I'll walk you through our journey from starting as a B2C-focused business to our recent evolution to selling to businesses, including:

- The not-so-PLG way Superhuman built an early dedicated fanbase
- The four factors that helped us decide on that unpopular narrative
- How we identified the most effective GTM channels
- Our playbook for expanding from B2C to enterprise buyers
- How we're applying product usage data to stay focused during this evolution

The counterintuitive way Superhuman onboarded early users

Superhuman might have the largest total addressable market (TAM) a product-led growth (PLG) company can go for — email users.

There are billions of people who use email for hours every day, for work as well as in their personal lives. That's always helped our growth. But we've gone about growing in a very unconventional way — particularly to get the earliest version of Superhuman to users. And not just any users: the perfect users.

We set our bar absurdly high by going after the "highest expectation customer," or HXC.

We were going for founders, CEOs, VCs, and other senior, well-connected professionals — for whom email is the cornerstone of their entire career.

This meant we were extremely choosy about who we gave the product to, and equally choosy about the onboarding experience they received.

We hand-picked our customers based on their email needs. Our founder and CEO Rahul Vohra and I quite literally went around San Francisco, manually onboarding these folks.

We gathered a tremendous amount of information from this process: where our bugs were, features people wanted, hiccups in the onboarding process, and more.

Just as importantly, we earned business as well as *trust*.

This hands-on approach enabled Superhuman to build a brand, make connections that are still impactful today, and, tactically, collect payment. That last point mattered a lot early on, because it's hard to convince people you've never met to pay for something that they can get elsewhere for free, such as email.

This is how we won our first few hundred customers, before transitioning over to Zoom-based onboarding meetings. I was doing 20 of these Zoom meetings weekly when we decided we would grow faster if I built a team to do what I was doing, so we did. I'll talk more about building and scaling your onboarding team in the following chapter.

How to know whether you should flip the PLG script

Even though email apps are typically self-serve products, in choosing to onboard customers manually, we made some deliberate choices that ran counter to the popular PLG narrative. We didn't offer a self-serve path to the product, free or otherwise.

This made sense for us because we were adamant that our HXCs should be successful in the product. By spending 30 minutes with each new customer, we were significantly more likely to help them become delighted customers.

There are four factors that led us to this conclusion, that any founder can apply:

Factor 1: Evaluate your product complexity

Email is complex. There are many features, views, and ways to use it — and even the infrastructure underlying email is complicated.

Because of this complexity, there's a big research and development (R&D) lift. Despite that, we wanted to get the product out to our users while we were building it.

A hands-on onboarding allowed us to explain why we didn't have certain features yet, and gave us a chance to understand in real-time where in this massive surface area to go next.

Factor 2: Deeply understand your users

We already knew we were choosing users with the highest expectations around product quality and robustness. This was a deliberate strategic choice:

1. We knew this segment was under-served by other products. There was a clear gap in the market we could fill.
2. Capturing this segment created an advantage for future expansion plans.

For these customers, we can't lose a draft or fail to send an email. If we do that even once, we don't just lose a customer — we lose the people they employ, the investors they email, and more.

This deep understanding of our ICP naturally led us to the conclusion that it made sense to concierge onboard our customers.

Factor 3: Pick your competitive positioning

Trends and competitors can inform your onboarding approach.

In our space, we saw Outlook and Gmail as the enormous and affordable base layer of the email world. On top of this was the ecosystem of add-ons and plug-ins that I lovingly refer to as "janky." Ironically, Rahul himself helped kick off this ecosystem with his company before Superhuman, Rapportive.

And last — there were several startups already trying to do what we were doing, such as Spark, Polymail, Newton, and more. They were all doing either a freemium or one-time purchase business model.

Evaluating this dense middle market, we decided to aim higher and offer a premium solution. To offer the best solution, we knew that we had to provide a paid solution, and that we were going to offer high quality, hands-on onboarding support for as long as it made sense.

Factor 4: Identify your own DNA

You should consider the very fabric and DNA of your company. For us, delighting customers is our top priority — which means offering a delightful product of extremely high quality. We knew how to create this experience in our engineering, product, design, and customer interactions.

As a result, we knew it made sense for us to offer hands-on support to capitalize on what our founding team was already ready to provide.

Where we landed on these factors led us to buck PLG "best practices" and still grow.

How Superhuman established its GTM channels

Through brainstorming, research, watching what worked for other companies, and experimentation, we crafted an early set of go-to-market (GTM) channels that complemented one another to amplify success.

User word of mouth

We always knew our users, as connected leaders, could be powerful vectors in our growth. So we focused on building a product, brand, and experience that they could fall in love with — and from there, they helped us spread the word through organic word of mouth.

Founder-led content

We were able to leverage thought leadership through Rahul, who is well known in the tech industry. This particular type of content resonates strongly with our HXC, even when it has nothing to do with email or productivity. In fact, our best performing piece of content establishes how a startup should think about and measure Product Market Fit.

Virality

Email naturally lends itself well to engineered virality. We implemented subtle mechanisms such as including "Sent via Superhuman" at the bottom of every email, which users can remove in their settings, and introducing in-app referral flows to further our marketing strategy.

Social media

We know our HXC spends time on social media — especially Twitter. It was here that we were able to establish the more friendly side of our brand, in contrast to the more avant-garde way that the brand is presented on our website.

Public relations

PR was pivotal for us to get our initial growth flywheel spinning, helping us land hundreds of thousands of sign-ups across 4-5 articles and events in the first few years.

🔎 The broader lesson? Choose a collection of GTM channels that mutually reinforce each other. If done well, the sum will be greater than the parts.

The playbook for layering an enterprise motion on top of B2C

Today, Superhuman is evolving — building on our B2C virality to sell to businesses.

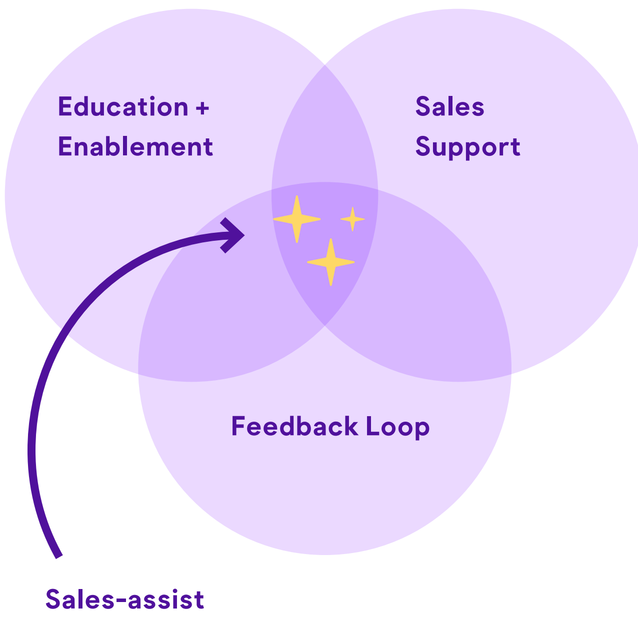
It was always the plan to start with founders and eventually expand to selling to their companies.

📖 To do that, our playbook is:

- Delight the founder/CEO + several of their employees — this mostly happens through organic and engineered word of mouth.
- Next, one of two things happens:
  - They organically choose to consolidate under one license to access more features and save more time.
  - We notice their disparate accounts and manually reach out to who we think will be the decision-maker — for example, the founder, or the head of department — to consolidate accounts and grow Superhuman usage.

The playbook flexes based on the customer. If customers organically unite their accounts, we let them do so. And if they don't, or if it's a large opportunity, we reach out with a sales-assist motion.

One factor that has made this layered evolution successful is support from senior decision-makers and influencers amongst our customers. Leaders who are already using the product and experiencing value for themselves are significantly easier to sell to than those who don't know who you are or what you do.



Our early focus on HXCs might have seemed outlandish at the time, but it ultimately has helped us cultivate a pocket of evangelists that have made the step towards enterprise easier.

Challenges moving upmarket

Of course, we've run into some obstacles in our evolution towards enterprise.

Proving value for larger teams

A common objection we hear is around value for money. Companies think: "Does everyone here *really* need this? We have engineers who hardly use email, after all."

This is fair. With a product like Slack, it's easy to see how having the whole team on the product is necessary. Because we deal in emails, building on existing infrastructure, it is harder to understand the team-wide benefit.

We're answering these big "Who needs this?" and "Why is this for everyone?" questions by evolving both our go-to-market approach, and the product itself.

Establishing self-serve and sales-assist swim lanes

If you're going upmarket from selling to individuals to selling to companies, you can't just apply a traditional B2B sales motion.

Instead, it's about layering a sales-assist motion on top.

The challenge is then: where do you draw your line in the sand?

- What does the marketing team focus on in terms of self-serve team revenue?
- What does the sales team focus on in terms of sales-assist team revenue?

Where you draw this line really matters for creating clarity and focus.

As a first step, you can define this line based on cost of sales and deal size:

A rule of thumb is that sales should ideally bring in at least a 4x or 5x revenue multiplier on top of the cost of sales. Then, consider how quickly your team can close deals. Then, given that revenue goal and deal flow rate, determine what annual contract value (ACV) is needed.

Let's go through an example.

Let's say that a sales rep costs $150k/year. The revenue goal should be 5 x $150K = $750k.

If the rep can close four deals every month, those deals need to be at least $16k each to bring in $750k of revenue in a 12-month span.

So your initial swimlane is: sales should focus on deals that are $16k or above and marketing should focus on deals smaller than that. *That's* where the first line in the sand should be drawn between self-serve and sales-assist accounts.

But you have to keep iterating on your initial hypothesis. I recommend revisiting your calculations every quarter for at least the first year to make sure the swim lanes you've established are still correct. 🏊

Using product data to understand user success and fuel growth

More importantly than ever as we expand our go to market, we are using product data *intensively* to understand our customers, and where to focus.

Retention and churn are lagging indicators. We want to know as soon as possible how well each customer is doing. So we rely on a few product usage data points as leading indicators of success:

- ↪️ Clearing actions: Inbox zero is at the heart of using Superhuman effectively, so we monitor the number of actions — marking something done, snoozing an email, and more — that a customer takes to clear their inbox. We call these clearing actions. Once a user does 50 clearing actions, we consider them activated.
- 📤 Sends and sessions: Once activated, we measure ongoing engagement by the number of email sends and app sessions every week.

These are the main product usage indicators that our customer teams pay attention to, and work to drive.

We've done a lot of analysis on which specific features matter, but nearly *all* of our features are at least partly correlated and causally connected to customer success. To keep things simple, we've decided that the best thing for customers is to engage in the above actions — clears, sends, and sessions. If they're doing those things, we can bet they're going to find value in deeper power features such as Snippets, Split Inbox, and so on.

🔎 The lesson for other PLG companies? Keep it simple.

You will likely find that many data points are interesting, but just not that actionable. When creating a metrics dashboard for your team, you need a way to focus on information that is the most actionable.

Ready to learn more about onboarding?

In this chapter, I touched on how counterintuitive onboarding tactics helped us gain success as a B2C-focused business and in our evolution to selling to enterprises.

To learn more about onboarding specifics and how you can apply them at your own company, head on over to the next chapter: The Superhuman playbook for building and scaling onboarding.

THE SUPERHUMAN PLAYBOOK FOR BUILDING AND SCALING ONBOARDING

Gaurav Vohra

Head of Growth & Analytics
and founding team member at
Superhuman, investor, and advisor

In the previous chapter, I covered many details surrounding our evolution from B2C to selling to businesses.

One of our most consistently powerful tools has been our commitment to providing the highest quality onboarding imaginable — even if doing so falls outside of the traditional product-led growth (PLG) narrative.

In this chapter two, I'm going to talk about all things onboarding, including:

- Where to position onboarding on the cost center vs. revenue driver spectrum, and why it matters
- How to goal onboarding teams
- Balancing personalization and automation in modern onboarding
- Superhuman's onboarding handoff flow
- Four frameworks for scaling onboarding

Onboarding: cost center or revenue driver?

If you read part one where I talked about the counterintuitive, hands-on approach we took to onboarding users in the early days of Superhuman, it will be no surprise that we saw onboarding as *purely* a revenue driver during our first five years.

Once we began to automate elements of the onboarding and introduce a sales team, a spectrum developed. Onboarding inched closer towards a cost center, while sales moved closer to being a revenue driver.

🔎 For you, onboarding can be on either end of the revenue spectrum. It depends on the outcomes the team is driving.

If your customers require dedicated support to get value because your product is complex, onboarding is a clear revenue driver. Not having a high quality onboarding will result in a noticeable loss of revenue.

If you have a self explanatory product where users can reach value quickly on their own, onboarding is closer to a cost center.

That said, businesses with the mindset that onboarding and support are *always* a partial revenue driver will unlock tremendous value for customers. Think of a company like Zappos that invests heavily in customer support. They use support to delight customers, and in turn drive word of mouth marketing and revenue.

“For you, onboarding can be on either end of the revenue spectrum. It depends on the outcomes the team is driving.”

Goaling for onboarding teams

When onboarding reported to me, we had a two-part approach to goaling:

Volume

Teammates needed to lead a certain number of customer onboardings each week. This assumed a steady stream of customer demand that was always slightly more than the team's total onboarding capacity.

Some teammates were able to excel at meeting and beating their volume goals by effectively managing their time and calendar — and pushing to meet with more customers.

Quality

The quality component of goaling measured the percentage of customers that each teammate onboarded who became successful by the end of their second week.

That meant onboarding owned the customer journey from the very first moment through the next two weeks. To make sure customers succeeded, teammates looked at product usage data, sent emails about features new users were and weren't engaging with, conducted follow-up conversations, and more.

Human-led personalization + automation in onboarding

Onboarding outreach at Superhuman has been personalized from the very beginning.

Of course, each teammate has pre-written templates that they can use. But they add personal touches to ultimately send hyper customized emails that make sense for the specific customer, given the metrics they're seeing.

At the same time, we also have a fully automated product email drip sequence, which runs in parallel to everything our onboarding teammates are doing.

This is critical because things happen — a teammate may call in sick one week, they may need to offload some customers to another teammate, and so on. The automated drip campaign ensures that every customer receives a baseline level of onboarding information.

The human-led personalized touch has been effective as a brand-building and retention tool as our team and customers have grown to know each other. It's an incredibly effective approach for creating brand evangelists.

Like anything though, onboarding personalization may not be for every business.

If you're going for massive scale, at some point this approach will slow you down as you hit bottlenecks around your team size, and how many customers or accounts they can handle without losing that sense of personalization.

The human-led personalization tipping point

We kept up strictly human-led personalization for a surprisingly long time.

At its peak, our team of onboarding specialists reached around 25 people. There was magic in our approach: the appreciation for the human touch was *palpable* across our customer base. We'd consistently receive praise from customers — in private and in public, for example on Twitter — about our onboarding process, and even on specific teammates.

This approach, although magical, cannot be indefinitely scaled. We carefully considered when to adjust by evaluating when engineering should switch from working on the core product, to working on in-app onboarding. At this point, it made sense to revisit our assumptions around onboarding and create a new approach that retains the speed and efficiency of automated self-serve, and the love and delight of concierge onboarding.

When it comes to automation and personalization, I don't think of it as an either/or choice. Invest in both and draw clear lines around when to lean into one or the other for the best outcomes.

How the onboarding team routes users

We have two customer-facing teams: onboarding and delight.

Onboarding

The onboarding team is focused on getting customers *initially* engaged. This team fully owns the first two weeks of the customer life cycle, and so they manage proactive outbound communications, and they field inbound requests from new customers.

If a question is complex or involves time-consuming debugging or digging, onboarding will tap the delight team into the conversation — initiating their handoff. 🤝

Delight

Delight owns the entire customer lifecycle from the moment onboarding is completed until the churn point, and sometimes even beyond. And their focus, as the name implies, is on creating delight.

The delight team mostly reacts to inbound messages via email. However, they also handle several proactive channels. For example, when a feature is shipped or a bug is fixed, delight will proactively close the loop with customers who were waiting on it — whether that's via email, Twitter, or any other channel.

The delight team's key metric is response time. We look for responses to emails being "surprisingly fast:" under five minutes during business hours, and if not, then under twenty minutes.

Four frameworks for scaling onboarding

Here are some of the frameworks that helped us go from experimentation to scale with our onboarding motion at Superhuman.

Framework 1: What are your priorities?

Understand whether your top priority is the core product, or a part of the customer journey that is higher up the funnel. If it's a choice, the core product should come first.

In Superhuman's first few years, the core product was top priority. When deciding whether to dedicate an engineer to core product or to onboarding — we decided to invest in the product. As a result, we concluded it made sense to scale the human touch onboarding.

Obviously, if you have the time and money to hire enough engineers to work on both things in parallel, do that!

Framework 2: Is it critical for ongoing customer success?

Is onboarding an added service, or is it a critical part of your go-to market?

It very well could be critical — especially for complex products with larger surface areas. This is almost certainly the case for B2B implementations, where customers are unlikely to succeed without some level of hand-holding. Some of the most successful B2B companies today have incredibly robust onboarding and implementation teams at scale.

Framework 3: Are you paving the way for future opportunities?

Is onboarding an ongoing investment that is helping you lay the groundwork for the future?

At Superhuman, we considered B2C onboarding as an upfront investment because we were sure that each individual customer was the seed of a much larger opportunity.

Framework 4: Are the economics viable?

Of course, you should validate that the economics of your onboarding approach actually work before you scale it.

Here's some simple math we can do using Superhuman:

Let's say one teammate can onboard 45 customers a week, each paying $30/month, for 45 weeks a year. That comes out to $730K of ARR. That's great

ROI from a time and resource standpoint. Even considering customer no-shows or cancellations and periodic shortfalls in demand — there is room to grow efficiently with those numbers.

However, the economics won't work as well at a $5/month price point. The economics of a large, human-led onboarding program aren't going to make sense for every business.

Find your onboarding truths

There are some core truths when it comes to onboarding in the PLG world: sometimes this function will drive revenue and sometimes it will drive cost, you'll have to develop goaling that properly incentivizes the outcomes you want to see, there will be internal handoff points you have to map, and you will face the personalization vs. automation decision multiple times over as you scale.

How you handle these truths and make them work for you will come down to your goals and mindset as a company.

I hope the frameworks and examples of how we've thought through onboarding at Superhuman help you deliver the best experiences you possibly can.

TRANSITIONING FROM SALES-LED TO HYBRID SALES

Angela Winegar

Strategy, BizOps, and Growth Analytics expert; investor; and Senior Director of Growth Strategy at Carta

Carta's growth practice is in a period of progression. We're layering on a Product-Led Sales motion on top of our traditional sales-led motion by offering a new self-serve product called Launch.

Here's how the Carta team has incubated the PLS motion by adapting a version of our product for the self-serve segment and *experimenting* instead of diving right into the deep end - and how it's influenced our team, culture, and customer journey for the better.

The first step: Running the experiment

I lead growth strategy at Carta, a company building infrastructure for innovators. We provide cap table management, compensation, tax solutions for founders, and fund administration for VCs.

I work on marketing and go-to-market (GTM) strategies, like PLG, pricing and packaging, and analysis to derive growth insights from our customer data.

My department includes the marketing strategy and analytics team, the pricing and packaging team, marketing operations, and the business team behind our freemium Cap Table product: Launch.

When I started, we didn't have the data I needed around the funnel to drive growth, so I set to work cleaning that up and implementing systems. It was because of this process that marketing ops, as well as the Launch business team, moved into growth strategy.

In 2020, we designed Launch as our onboarding flow for law firms to be able to onboard their customers to Carta. It was only available to law firms; otherwise, there was no way to access it.

We built it because many of our cap table customers come through law firm referrals, and we wanted to make that process smoother for lawyers and founders. But, we quickly realized this onboarding flow would also be helpful for early-stage founders.

So in 2021, we opened Launch GA. The deal was and still is that anyone with up to 25 stakeholders on their cap table or under a million dollars raised can sign-up, build a cap table on Carta, and use our software — for free.

Launch started as an experiment that felt like a natural evolution for our users and us. At the time, we weren't sure if anyone would want to build their cap table. It can be confusing to navigate different equity structures and every founder's situation is unique. But Launch has changed how we do business and we're considering how it may influence product-led motions around other product lines.

Why PLS works at Carta

Fundamentally and culturally, we are still primarily a sales-led organization.

But, one of the best parts of Carta is how our leadership — especially our CMO Jane Alexander and our CRO Jeff Perry — understands the vision around product-led growth (PLG) and the Product-Led Sales motion.

At this point, we see PLG as an obvious way to remove friction from onboarding. Different end-users value different onboarding experiences. Some founders want to talk to sales to help build their cap tables, whereas others want to do it themselves. Building Launch has allowed us to create the preferred experience for either type of founder.

Luckily, buy-in across the sales org for the self-serve motion has been high for a few reasons: many Launch customers are early-stage startups, so sales reps do not want to spend significant time on a $1,500 deal. Customers also prefer the self-serve motion because they can choose how they onboard onto Launch. Repeat founders understand equity, convertible notes, SAFEs, and 409A, so they can self-serve, whereas first-time founders prefer to talk to sales.

Since many customers want to talk to sales, we see Launch as a lead-gen motion. This understanding of self-serve as led-gen helps us avoid the notion that self-serve is cannibalizing sales, which helps us avoid any “turf wars” or competition between the two motions.

How to prepare the product and team for PLS

We’re working on making product elements more friendly for self-serve users with a significant focus on education. It sounds simple, but experimenting with things like in-app guides and sitting down next to customers as they onboard has been the most helpful in showing us what we need to build to make the product more user-friendly.

But what’s evolved the most since Launch launched has been our team. We’ve gone through many evolutions as we’ve tried to match Carta’s organization structure to customer needs.

When we first opened Launch to the general public, we hired one person as a ‘GM’ of the experience to ensure success. We initially assigned a customer success manager (CSM) to each customer who routed all support tickets to the SMB support team. We didn’t yet know the best way to handle the self-serve user-base.

We learned that we would need to scale this new journey in a fundamentally *different* way than the sales-led approach we were used to.

We decided to treat users in this flow like paying customers, so we built an official product specialist team — we now call them the Launch business team — to work with customers. Instead of having a CSM and a different support analyst with every experience, the product specialist team became the Launch customers’ primary point of contact. This has allowed us to scale the team more efficiently while creating a better user experience.

Today, we continue developing the onboarding flow that started it all. And I hope there's a future world where it becomes the default onboarding flow for *all* of Carta's users who want it to be – not just those under 25 stakeholders and a million dollars in VC funding.

Compensating for fewer sales touch points

We're sales-led product-accelerated for a reason.

Equity management is *complicated*.

A significant educational component goes into a cap table purchase and equity management in general. That's why we've always tried to position ourselves as educators.

> One of our biggest challenges in going product-led has been removing those hands-on sales touch points where we used to educate the user.

You know where this is going — one of our biggest challenges in going product-led has been removing hands-on sales touch points where we used to educate the user.

We've solved it in two different ways:

1. For those that might want to talk to sales, we offer human assistance in the self-serve onboarding flow in the form of an email. This email automatically goes out after anyone signs up for Launch.
2. One of the most impactful actions we've taken in our new PLG motion is offering human assistance in the shape of an email that automatically goes out right after anyone signs up for Launch. It allows new users to book time with a support rep to discuss the product — or ask cap table and other equity questions.

Lots of folks are now saying every company should go fully product-led. There are all these economic benefits, so why wouldn't you? For high-touch, complex products, there isn't a replacement for talking to a real person. For us, PLG isn't about trying to take that away. It's about giving customers the option to choose the right lane for them.

Identifying the critical touch points

We knew that the need for education would be a point of friction for our self-serve segment by turning to the data. As soon as we analyzed our funnel, it was clear that the places where users got stuck also required the most subject-matter expertise.

The category we use in our support tickets is "knowledge gap." And that knowledge gap is the number one reason for Launch support tickets at Carta. We see this both in knowledge about the product and equity.

Dashboards and support ticket analysis are helpful, but sitting down with customers as they experience the product for the first time is key to understanding their needs and pain points. The Launch Business Team makes it a priority to onboard at least one customer each week. They also regularly email subsets of customers who have yet to take action on the product and check in so they can constantly empathize and improve the customer experience.

Metrics we use to measure the PLS motion

The metrics each business chooses to measure the success of the PLS motion will vary based on your product, market, and ICP.

These are the core metrics we track in our Launch PLS motion:

Go-live rate: This is the North Star Metric for the Launch business team. It measures users who have signed up successfully and issued their first security through the platform.

Our product specialists focus on improving the go-live rate by determining the best opportunities for human touch points during the customer journey. One tactic was the automated email I mentioned earlier that made it simpler to talk to a human, which increased the go-live rate by over 20%.

Sign-ups: Our primary top-of-funnel metric is our sign-up rate.

Upgrade rate: This metric measures the rate at which self-serve customers meet the threshold for free to paid conversion. We have a decent number of users upgrade before reaching the threshold because contact sales when they need a 409A for their company. So we've worked on flows that educate around 409A's and offer to set up time with sales or support.

Ice-boxed accounts: These are the accounts that don't upgrade once they hit the Launch thresholds. Our PLG team sits next to our pricing and packaging team, so we have a direct line for feedback from our Launch customers, which has helped us step to reduce ice-boxed accounts proactively.

Churned & inactive accounts: It's easy for us to keep track of churned accounts because there's paperwork required to transfer agents. Inactive accounts are more dubious than churned accounts, but we track logins in the past 30, 60, and 90 days and focus on reactivation as needed.

The next evolution for us will be to better track customer health based on all feature usage, which won't drive more upgrades but will drive a more engaged, happier user-base.

Tips for building the right PLS team

Creating a team around our new PLS motion has been successful because of a few reasons:

Hiring around empathy

Charlie Dillingham, the head of our Launch business team, is amazing. He has built his professional career around customer love. Most recently, he ran customer experience for Salesforce Essentials (Salesforce's SMB solution).

Empathy is important because the product specialist role is very customer service oriented.

Every team member must have deep customer empathy because customers often come to us frustrated - equity is an overwhelming concept!

Aligned incentives and goals

Our sales team's incentives prevent cannibalization with self-serve because of the smaller deal size of potential opportunities.

In addition, we're *very* clear that the North Star Metric for the Launch business team is the go-live rate of Launch users.

Our team is aligned on incentives and the goals we're striving for, which increases PLS acceptance, prevents in-fighting over leads, and moves us all together in the right direction.

What's stopping you from experimenting with PLS?

For Carta, transitioning from purely sales-led to a PLS motion has been a huge success.

Through experimentation and incremental change, we've found a way to make Product-Led Sales work for our team, our users, and the product itself.

I've learned along the way that it may be the end of seeing your company as *firmly* in one camp or the other and the beginning of adopting the specific GTM lever that works best for your customers. I see a future in which every business has self-serve and human-assisted channels.

And what's next? I'd love to build out our PLG VC onboarding experience for fund management. There's a ton of opportunity for more PLG motions to exist, given where we play in the startup ecosystem, and I can't wait to bring those to market.

SECTION FOUR

SECRETS TO SALES ENGAGEMENT

Is outbound actually dead? (No.) How can you deploy GTM teams across every customer lifecycle stage? Can your website be doing more to convert inbound leads? As companies adopt increasingly complex hybrid motions routing, team objectives, and alignment can be difficult to get right. In this section, you'll learn how to use outbound to strengthen your PLS motion, best practices to layer outbound on top of PLG, multithreading strategies to move upmarket, website optimization tips, hiring and training for the sales-assist function, and how to use different sales channels to help you land, expand, and retain customers.

HOW TO USE OUTBOUND TO STRENGTHEN YOUR PLS MOTION

Maggie Hott

Director of Sales at Webflow, Eventbrite and Slack alum, advisor, and investor

From introducing the Product-Led Sales outbound motion at Slack that helped it hit one billion in ARR, to growing Webflow's sales team from eight to 100 and tripling revenue — I've been lucky to lead successful outbound teams for most of my career.

I've repeatedly seen that outbound sales *works*, even for product-led growth (PLG) companies. And you can make it work for yours, too, if you're willing to do the work.

In this article, I'm going to cover the following:

- How Webflow's success shows that outbound works in the PLG space
- Who outbound is for (hint: it's everyone)
- Fill your outbound toolbox with foundational, research, and productivity tools
- Creating an efficient and consistent outbound strategy
- Delivering personalized outbound emails that convert

The numbers don't lie — outbound works for PLG organizations

When businesses succeed with the inbound motion, they tend to wait longer than necessary to branch out into outbound.

This phenomenon is especially prevalent in the PLG space and was what I saw at Webflow when I joined in 2021.

At that time, about 90% of our wins were coming from inbound.

Today that is not the case.

At the end of 2022, 54% of our wins were inbound.

Looking at our pipeline for 2023, we're set to do more outbound than inbound, have our biggest quarter ever, and more than triple revenue. 📈

I can hear you thinking — but what if my company is pre-product-market-fit and we're still trying to win our first customers?

To that, I say outbound sales is definitely for you. Initially, your messaging may be less about getting a contact to buy your product and more about getting them to provide feedback on what you're building. As long as you're reaching out to the right ideal customer profile (ICP) and personas, your outbound strategy should get them so excited about what you're creating that you can convert them once there's something to buy.

Two types of outbound, same basic rules

While warm and cold outreach fundamentals are nearly identical (personalization, multi-touch, and point-of-view driven), it's important to understand the difference between warm and cold outbound to guide your messaging.

Cold outbound

In the cold outbound scenario, the prospect has never used or experienced your product. They may not even know about your company.

In this scenario, you see:

- Heavy education is required on what you do, who it's for, and why you are reaching out.
- Multi-channel is table stakes. This includes reaching out via phone, email, LinkedIn, and more — depending on your ICP.
- Lower conversion rates are the norm, be prepared.

Warm outbound (typically PLG)

With warm outbound, the prospect is already familiar with your product — you've got their contact info from your database, either from a marketing interaction (MQL) or product interaction (PQL). In Product-Led Sales, warm outbound is directed at self-serve sign-ups for various reasons like trying to convert someone to a paid plan, expanding the account, cross-selling a new SKU, or upselling to a higher-tiered plan.

In this scenario, you see:

- Less education is required because the prospect could already be a product champion.
- Less emphasis on multi-channel as you can probably use existing communication channels. More emphasis on crafting a personalized story based on intent data available (product, marketing, sales).
- Higher conversion rates, especially the more engaged the prospect is with the product.

For the rest of this article, I will use the word outbound, but I am interchangeably referring to cold and warm outbound.

How to: Pick the right tools for outbound

I cannot emphasize enough how important it is to buy quality tools that support your outbound strategy. Even the expensive ones will be well worth the time and energy they save you and your team.

Here's what I'd fill my outbound sales toolbox with if I were starting from scratch.

Foundational tools

Customer relationship management (CRM) platform: Get your contacts out of those spreadsheets where you can't accurately share, update statuses, and add notes. There are many to choose from, such as Salesforce and HubSpot. It's important to get something spun up in a CRM as soon as possible to avoid the pain of data clean-up and implementation as you scale.

Email tooling: Why email tooling? Because it's critical to being able to run a tight outbound ship even at scale. Outreach and Salesloft are popular options. We use Outreach, but the choice is yours.

PLG platform: If you are a PLG company, you should absolutely be using a PLS platform that helps you work smarter, better, and faster. We use Pocus to help us harvest and use all our product data. (I'm an investor and advisor at Pocus, but it was also the best PLG platform we found after an intense nine-month search for the right tool.) 🔮

Research tools

Contact database: Great outbound sales aim to touch as many contacts with personalized outreach as possible — in the shortest time possible. You will need a database like ZoomInfo, Apollo, etc., to gather the third-party data you need for personalization.

Sales management platform: In my opinion, LinkedIn Sales Navigator is the single most crucial tool in doing sales research. Yes, it was expensive. Pay for it, and keep rockin'.

Lead research helper: Since we sell a website platform at Webflow, we use research tools (BuiltWith and Wappalyzer) that scan a lead's website to tell us what tech stack they're already working with, which helps us tailor our messaging. The specific research tools you need will look different depending on your product.

NOTE

Hustle philosophy

You *must* have your mindset right before moving forward. You have to make up your mind that you're committed. Outbound is not a one and done, it's a grind. You have to keep doing it, even when it's hard and even when it feels slow. That has to be the mindset you, your sales leaders, your sales team, and really your whole organization adopts.

Productivity tools

Generative AI program: I will talk more about how to use artificial intelligence (AI) to outbound later. I'm currently using ChatGPT. Keep an eye out for sales tooling built with the same underlying framework ChatGPT uses — OpenAI.

Documentation storage: I'm a big proponent of saving everything! You never know when a lead or account will switch hands, when you want to reuse messaging, or when you need to revisit research or a past strategy. Google Docs is an obvious choice.

Communication platform: We're big on sharing wins and what works. At Webflow, we use Slack to celebrate and circulate write-ups on wins that help everyone succeed.

TIP

Re-evaluate your ICP every 6 to 12 months. More if you're a hypergrowth company.

How to: Build your outbound strategy

I'll be honest. There's never been a worse time to do outbound.

Buyers are flooded with options, and budgets are lean. The above tools will make you better, but you will fail in this environment without a strategy to keep you efficient and consistent.

Here's how to create a successful outbound sales strategy.

1. Define your ICP

First, it's important to have your ideal customer profile locked in.

An ICP is a detailed description of the type of customer most likely to benefit from your

company's product. Focus your sales and marketing efforts on the prospects that are most likely to generate revenue.

HOW TO BUILD AN ICP

- Make a list of all your best customers.
- Identify common attributes (size, industry, country, growth rate).
- Look for common pain points and business challenges.
- Understand how and why these customers chose you over your competition (don't just think price, consider your product's impact on their company).
- Look for companies that fit this profile and sell to them.

ICP is the company and persona is the actual person to whom you're selling inside the company. You need to research both to determine which leads have the highest likelihood of conversion

In the following example, that's probably the person who's more interested in innovation, founding, and investing.

EXECS: WHO WOULD YOU REACH OUT TO?

Co-Founder
and CEO at Pocus

Alexa Grabell

- Active on LinkedIn
- Publishes a weekly newsletter
- Talks about PLS and PLG

CEO at Pocus

- Limited profile on LinkedIn
- Has never published online
- Founded Pocus 2 years ago

2. Hone your targets 🎯

A lot of people are probably going to fit your ICP, so it's important to narrow down your list of targets based on the following:

- Shared investors
- Similar customers or similar wins
- Competitors to the customers you have won
- Same user persona
- Campaigns: product launches, new customer stories, dead opportunities, and other compelling events
- People who have switched jobs from your current customers

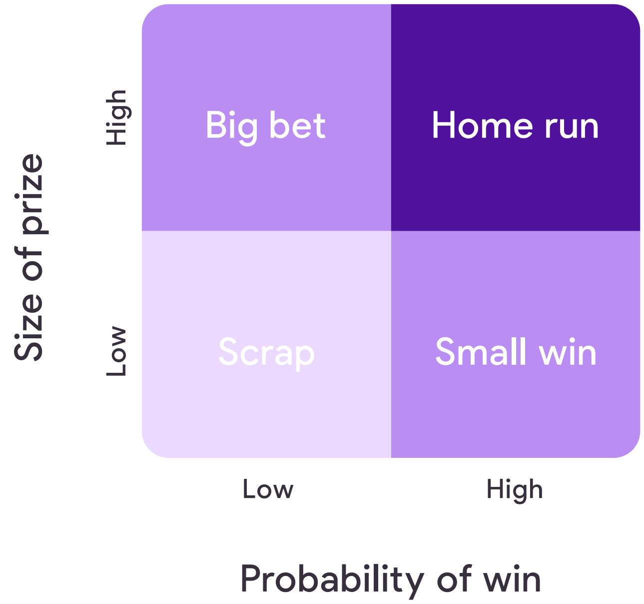
That first filter, shared investors, was something in which we found a lot of success during the early days at Slack. Sharing an investor makes for nice common ground and a warm intro. I would go through an investors' portfolio and outbound with a message like, "hey, we're also an Accel portfolio company. I think we can help you with X, Y, and Z."

I advise picking no more than one to two strategies and going deep on them. Don't spread yourself too thin, but do document all of your plays so you can refer back and re-run the plays. If you've picked a strategy that isn't working for you after a month, pivot to a new one.

3. Tier your book of business

AEs must think about two things when looking at their book of business: what's the probability of a win, and what's the size of the prize?

To further prioritize and work at maximum efficiency, you must be realistic with yourself about who you can close and where the highest win lives.



4. Prioritize accountability

Accountability is key in making our outbound motion tick.

Every week, I hold a standup with all of my pipeline generation leaders across sales, marketing, and ops. We look at metrics like activity and pipeline created by source and stage.

To make this more efficient, I've created a doc that everyone attending the meeting can fill out beforehand, so they come with their numbers ready. It sounds like a lot of time, but I have found that taking an hour weekly to review the pipeline is the best way to avoid dropping any balls.

5. Stick to a schedule

This may sound obvious, but creating a schedule that puts outbound first — and *sticking to it* — is the best way for AEs to hold themselves accountable to outbound.

Outbound is always the first thing pushed when sales gets busy. I have reps who will have one outstanding quarter and almost nothing in the pipeline the next quarter because they didn't stick to the schedule and focus on building the pipeline *first*.

6. Work backward from your quota

Another part of a successful outbound sales strategy for AEs and sales leaders is setting goals by working backward from your quota.

Revenue target	$XXX,XXX
Average Opp ACV	$XX,XXX
# of opps won to target	XX

Win rate	50%
# of opps required	XX
Meeting to opps	4:1 (25% conv)
#of meetings per month	40
#of meetings per week	10
#of meetings per day	2
Activity to meetings	10:1 (10% conv)

> Every single person at the company needs to be doing outbound sales. We are all shareholders, we are all stakeholders. Every single person. There are zero excuses.

Look at your quota and average opportunity ACV to determine how many opportunities you need to reach. With your win rate added to the calculation, you can figure out how many daily meetings you need to schedule to stay on track.

This is impactful to keep sales marching toward their goals instead of leaving it up to chance.

7. Put everyone to work

One of my biggest secrets to success in outbound is that I put *everyone* to work — execs, investors, and board members. 💪 For example, I'll ask our CEO to send a message to a prospect such as "hey, I'm Vlad, the CEO of Webflow. I've been following you for a while. I know our teams are talking. Let me know if I can help at all. We'd be thrilled to have you onboard".

We attachexecs to opportunities in Salesforce so we can pull reports to see who's putting in the most work. It creates competition and gives us a lot of chances to share and celebrate wins.

8. Multithread (It works!)

An influencer or a champion will rarely be your buyer — but with multithreading, they can help you reach that buyer. Multithreading is the practice of building a roster of contacts across an account and creating a network of champions and influencers who can help you make your case to decision-makers.

There is a direct correlation between the size of a deal and how many people are involved in the deal, so don't discount multithreading as a critical piece of your outbound strategy.

9. Leverage AI to work smarter

I use ChatGPT for things like proofreading, lead research, finding industry insights, and even writing subject lines and emails for me. I'll give it bullet points, explain my audience, and have it create fully-written emails that only need a little tweaking.

Numerous sales products are being built off of OpenAI/ChatGPT. I think this is one of the most exciting technologies to hit the market in my career, and I am excited for what is to come. If you are not leveraging Generative AI, you are already behind.

Another hack I've figured out is using ChatGPT to read the complicated 10-Ks that publicly-traded companies must file. In 30 seconds, it can summarize company earnings, structure, risks, and everything else laid out in a 10-K. It's saved me *countless* hours of selling to publicly-traded companies.

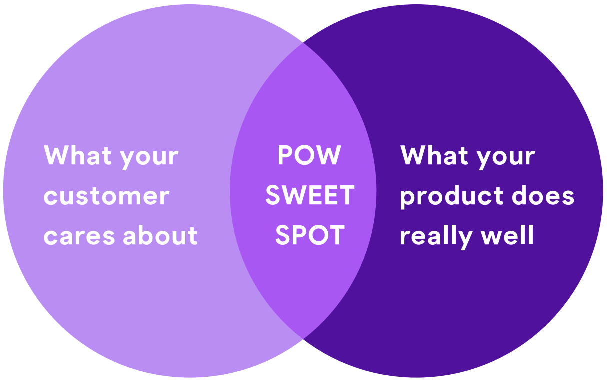
How to: Deliver great outbound emails

In this final section, I want to get into the nuts and bolts of creating effective outbound emails to bring home the above tools and strategy.

1. Develop a POV 👀

The most important thing you need to consider when creating outbound content is your point of view or POV.

POV is your hypothesis on why you will deliver them value. Your POV should lie at the sweet spot between what your potential customer cares about and what your product does well.



WHY POV MATTERS

POV is critical for two reasons.

First, it's where you start building trust and credibility with leads. You've shown you can anticipate their needs, which positions you as a consultant and partner instead of just a salesperson looking to cash in.

Second, coming from the right POV can also increase potential deal size. When you can tie your offerings *directly* to executive-level strategic objectives and ROI, you can create more interest from C-suite buyers.

To learn more about creating your point of view, I like this article from Databook.

HOW TO CREATE A POV

Create a tight POV before every reach-out by considering three categories: industry, contact and customer, and your product positioning.

Industry research

- Which industry trends are relevant?
- What external factors are putting pressure on this customer's industry?
- What similar customers to them can we reference?

Contact and customer profile

- What are their business goals?
- Who do they compete with?
- How do they make money?
- What is their company strategy?

Vision, solutions, and use cases for your product

- What similar customers have we helped?
- Where can our product increase their revenue or save time?
- Who might care about it?

Finally, you'll document your findings in each category, positioning them as answers to key questions that will come in later as you actually craft email content. Create a chart or spreadsheet of all the findings for easy reference and storage. At Webflow, we call this "POV at Scale."

Documenting POV at Scale

- What does the company do?
- Which solutions are tied to revenue, cost reduction, customer retention, innovation, etc.?
- How can they leverage your product to improve the productivity of core processes?
- Can you remove friction and delays from processes?
- Are you differentiated in your solution?
- Is your vision for the customer emotional, transformational, and quantifiable?
- What are some relatable customer stories you can share?
- How will the CFO justify spending on your tool?

2. Provide customer proof

I can't begin to tell you how many messages I get where the salesperson doesn't reference any of their customers, which I think is a mistake. Buyers want to know if you're a two-person shop or a 200-person company.

You need to tout who your best customers are, so that leads feel comfortable considering your product.

Here's how to create social proof for buyers:

- Develop a customer story matrix.
- Link ROI to customer stories.
- Display prominent logos on your site.
- Put case studies on your site.
- Create 3 to 5 punchy customer stories you can tell at the drop of a hat.

3. Personalize

While you can personalize messaging based on the industry or company, it's always better to personalize based on the individual persona you're reaching out to.

Here are some of the ways you can sleuth to get personal information that will make your messages stand out:

- Google them: Have they written articles? Do they have videos?
- Review their Linkedin: Are there shared connections you can reference?
- Look for them on Twitter.
- Figure out their online tone of voice: Serious? Playful?
- Read their blogs and understand their messaging.

The goal is to always make your messaging about them, what they care about, and how you can help them. Never make it about you. It's really hard to ignore an email that's been personalized.

4. Draft following the 10-80-10 framework

Time to put pen to paper. ✍️

The most digestible and scalable framework for writing your actual outbound sales emails is what I call the 10-80-10 framework. While you only have to personalize 20% of the email, with this strategy, it will feel 100% personalized.

Here's how it works: in the first 10% of the email, you open with a hyper-personalized greeting and the POV you've carefully developed for this lead.

The next 80% of the email is messaging you can reuse — it just details things like who you are, who your company is, what it offers, some of your best customers, etc.

Then, the final 10% includes a little more of that POV flair and a personalized call-to-action.

10%	• Personalized introductory sentence • Share one thing you learned in your research (most relevant) • Show your POV or research
80%	• Meat of the email • Value prop and why you're reaching out • *Majority is reused without editing* • *Include at least 2 reference customers*
10%	• Personalized closing line • Share one thing you learned in your research • Try to drive urgency where possible

Ideally, you want to keep this email as concise as possible. The truth is that most emails are consumed on mobile devices — so don't scare recipients away with a short novel.

I also try to focus on the subject line with this framework because about half of the emails are opened based on the subject line alone. My research indicates that subject lines with 60 characters or less perform the best.

5. Follow-up

Follow-up on outbound emails. No matter how often this advice is shared, it's still a step many sales reps and marketers fail to take.

It can take anywhere from 10 to 17 multi-channel follow-ups to get a response from a prospect. At Webflow, we *rarely* see responses to the first email. It usually takes until the fifth or sixth touch for us to get our first response. Keep at it.

Get Pocus' intro email template

Wrap up and recap

Outbound sales can revolutionize revenue at your PLG company — but only if you go after it with an outbound tech stack full of the tools you need for research and productivity, build a consistent outbound strategy, and put in the work to deliver personalized outbound emails.

If you take nothing else from this article, take these top tips to build an outbound sales strategy that cuts through the noise:

TIP

Plan your entire outreach campaign ahead of time. Decide how many follow ups you're going to send until you get a response, and create and schedule them in advance

- Adjust your mindset. Outbound is not a one-and-done. It takes time.
- Invest the time and tooling upfront to make your life easier.
- Adopt a multi-channel approach to reach prospects. Use phone and LinkedIn outreach as part of your strategy, and get closer to your prospects by following up with them.
- Make it all about your prospects. When following up, focus on them and the benefits your product can bring to their lives. Avoid talking about features and instead emphasize the positive impact your offering will have.
- Personalize your outreach. To increase the success of your campaigns, personalize each element and do your best POV research to make your prospects feel special.
- Keep it short and sweet (KISS). Your prospects are busy. Make your messages informative, to the point, and easy to understand.
- Sharing is caring! Create an outbound sales channel in Slack for all responses, great emails, learnings, etc. The more you share, the more everyone learns, and your sales team performs better.

MULTITHREAD YOUR WAY TO UPMARKET DEALS

Ryan Libster

Head of Enterprise Sales at Persona and builder of teams, strategies, and motions throughout the enterprise sales space

One of my favorite things about scaling GTM teams is the legwork of building out repeatable processes.

Moving from finance to edtech sales to my first exposure to product-led growth at Dropbox in 2014, I've had the opportunity to help build many new teams — as well as many new go-to-market motions.

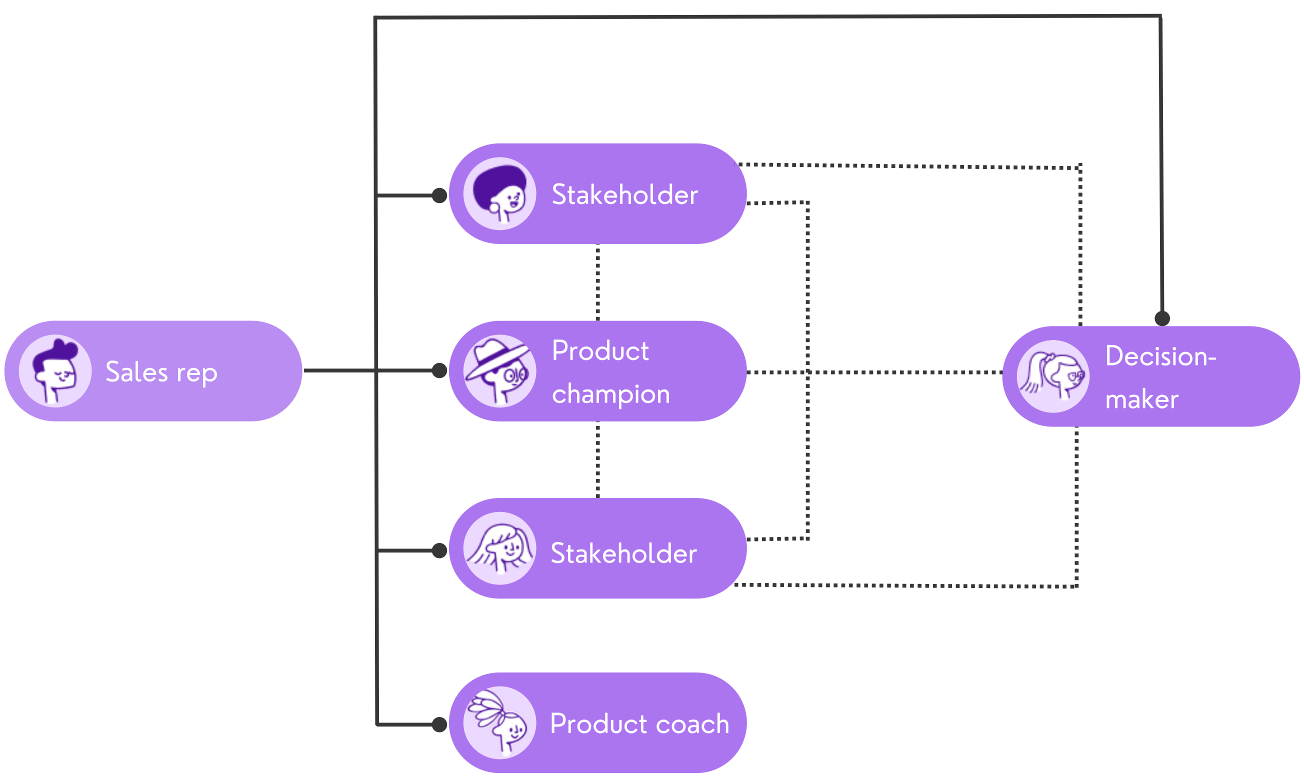
And building is something I continue to embrace in my new role as Head of Enterprise Sales at Persona.

As I'm working to build the upmarket motion for our growing enterprise segment at Persona, here's what I'm thinking about when it comes to multithreading, connecting with champions, and beyond.

What is multithreading?

In the sales space, multithreading is the practice of developing contacts across a business, with the end goal of creating a wider net of champions who can help you make your case to decision-makers.

Ideally, you want to build these threads thoughtfully across business units to broaden your exposure.



What makes multithreading valuable in sales?

Multithreading is a critical skill to have as a salesperson — *especially* in PLG companies.

Often, a PLG product will gain a cult following with a group of end-users, but these users do not have access to buyers or folks who influence the buying process (i.e., IT).

Those decision-makers are not in the product, so a Product-Led Sales motion requires that you multithread into different areas of the organization to move upmarket and sell enterprise contracts.

You can have all the usage in the world, but if there isn't buy-in from the decision-making committee, you won't be able to sign a true wall-to-wall agreement. This rang true during my time at Dropbox and Slack.

How to kick off a multithreading strategy

Effective multithreading is mostly about research and planning and a bit of careful sales execution to bring the overall strategy home.

Identify the usage signals you want to act on

Today, revenue is all about data — like which product usage signals indicate high-potential leads.

What product usage signals indicate an account is ripe for expansion? When should you start building the case with an economic buyer?

That's going to depend on your unique product monetization strategy and what's going to compel your audience to move to a higher tier, but here are some specific usage signals that I've worked with in the past:

At Dropbox, we looked at the number of people collaborating on a shared folder and how much storage a person used — among many other data points.

At Slack, we looked at the percentage of communication happening in public channels compared to direct messages — this was an indicator of whether teams had adopted the platform as a high-value knowledge database instead of a basic chat tool.

We also looked for important integration points. We wanted to know if teams or individuals were starting to plug in their other systems, like Workday. If so, we found it valuable to multithread our way up to HR, or the departments that had relevant integrations.

Build your account strategy

Multithreading is about zooming out as much as possible. When you're coming up with an account strategy for multithreading, it shouldn't be all that different from any sales account strategy in the first place.

So, here you're thinking broadly about:

- What does this company care about?
- What is your value prop?
- What messaging can you use to marry those things?

Map use cases to pivotal personas

As part of your account planning & research efforts, you need to map out the org and truly understand the differences between your end-users, real champions, and decision-makers.

Plenty of tools are out there to help you understand how a company operates and who manages what (i.e., LinkedIn Sales Navigator). When running a PLS motion, tie these tools to your source of product data to understand who signed up, their use cases, and potential expansion paths.

To be successful with multithreading, you should already know the use cases across different personas by the time you start the conversation with your champions. You're in a *much* better seat if you've already done that homework rather than figuring it out while having those conversations live.

Your job as a salesperson is to do all of that use case collection and then bring it to the ultimate decision-makers. And when it comes to enterprise contracts, it's not usually one person — it's a committee. You need to know who's on that committee and have a pretty good sense of how the different departments get value for the product.

Put boots on the ground

Finally, you will need to do some hands-on outbound and develop relationships across the business. This is when you're figuring out how to best leverage the people who have raised their hands and are already getting some value from the product.

While this process is not one-size-fits-all, a good place to start is using product usage data to build a solid case for the decision-maker on how the

NOTE

To demo or not to demo?

When working with economic buyers, it can be tempting for PLG orgs to want to throw buyers into the product to see all the value it provides.

The thing is, decision-makers who aren't end-users might not receive the same value from your product. So walking buyers through your product might actually stunt the sales expansion process more than anything.

If you really feel it's important to give a buyer insight into your product, create a very custom demo that highlights exactly where your product adds value for them, specifically.

I don't think this step is particularly necessary if the other elements of your multithreading strategy are strong, but if you get it right, it's icing on the cake.

product addresses business needs. I usually look at product usage data to answer questions like:

- How are they using our product?
- Why did they sign-up?
- What kind of value are they getting out of it?
- Is there a chance someone on this team will help me champion the product to decision-makers?

Who are multithread "champions"?

Especially in a PLG motion, there are always people who are happy using your product who aren't necessarily going to champion it to decision-makers or another "thread" you want to reach.

You must distinguish between these users and understand the difference between coaches vs. champions.

Coaches

Coaches are usually very open with their time and happy to give you insights into the company. However, they might not have the clout needed to help you reach decision-makers, so they're not necessarily able to or interested in selling internally on your behalf.

Champions

A champion will still be helpful and real with you, like a coach, but will also be able to sell on your behalf. With a champion, you can be confident that even when you are not in the room, they share the value you've been talking about — and they have the sway to move the needle.

How to equip your product champions

I tell sales folks to share the vision they have for the account with their champions, including how moving to an enterprise plan would benefit them personally.

Put yourself in your champion's shoes. They were doing just fine using your product with their team — why does it matter to them if the rest of the org is using your product? You have to make it worth their time to consider your pitch and persuade their higher-ups.

I would try to drive action by arming my champion with helpful collateral highlighting the product's qualitative and quantitative benefits.

Selling at Slack, for example, we would create executive overview leave-behinds that included the value that the prospect would receive if everyone was using the product. We'd calculate this by doing an ROI analysis on the people already using the product, then multiplying that by the number of users they'd end up with under an enterprise contract. The final step is creating a note your champion can send to their boss or buying committee on your behalf.

To improve the odds of a leave-behind being impactful, share a draft with your champion and use their internal company knowledge to sharpen the messaging, ROI data, and more.

COACH

Happy to collab

Provides insights

Doesn't have influence

CHAMPION

Happy to collab

Sells on your behalf

Has influence on decision-makers

It's all about adding value while minimizing your ask as much as possible.

Barriers to multithreading

Whether or not a multithreading strategy works upmarket depends on the gravity of the problem the product is solving — and, therefore, how senior the decision-making committee is at the target organization.

Take Stripe or any other payment company, for example. When you're the lifeblood of revenue, you're automatically talking to the CFO or the CEO, right? If a payment platform goes down, it's a p0 problem 100% of the time. They're *immediately* calculating how much money they're losing every minute it's out of commission.

The problem you solve is the primary driver of how easy it will be to get high in an account and connect with a decision-making committee. There are plenty of examples of companies that thrive in the SMB space because that's what the economics of their pricing and their functionality is built for. To move upmarket, they'd have to change a *lot* about the product — and their go-to-market motion.

Another limiting factor to multithreading upmarket is how you've developed your product roadmap. Some products require full buy-in from the top across product, engineering, and marketing. They're building extremely custom solutions, doing account-based marketing, and creating customer advisory boards — all of the fundamentals of selling to the enterprise.

This isn't to say that products created for end-user buyers can't transition into enterprise sales — but it certainly takes work and time not only to pivot product-market fit, but also to change that perception. We've all seen it happen at companies like Dropbox, HubSpot, and Shopify.

A final note: How to deal when objections block your thread

We should all expect to run into objections in the sales cycle. In this case, one common roadblock is executive buying committees that don't particularly *care* about consolidating all of their siloed users under one enterprise license.

This is especially pertinent when you aren't connecting with IT or CSOs who are interested from a security perspective. You'll get a lot of "that's not my purview" brushoffs.

In these cases, there are several things I encourage sales teams to consider:

Do I need to rethink my champions? What other user or team within this company has more interest in being a champion, more selling power, or more influence?

Was my account strategy flawed in the first place? How can I reframe my value prop to make more of an impact?

Do I need to find a way around this person who's saying no? I always tell my team not to take a "no" from someone who can't say "yes."

If you're not getting a no from the absolute top tier of the totem pole, keep pushing — there may be a yes waiting for you.

ENTERPRISE CONVERSIONS THROUGH WEBSITE PERSONALIZATION

Stewart Hillhouse

Head of Content at Mutiny

Software buying has changed. For many SaaS companies, customers sign-up for their product after a single website visit without speaking to a salesperson. This is the era of product-led growth (PLG), and it's both afforded go-to-market teams a ton of opportunity and a fair share of challenges.

In a PLG world, your website is essentially your SDR at scale. So like an SDR would, how do you personalize the experience across different verticals, customer segments, and personas?

For PLG companies, segmenting the website experience between SMB and enterprise can be hard to balance. The biggest problem? Self-serve isn't always the right motion for every potential buyer that lands on their website.

The most common example I've seen across several Mutiny customers goes like this:

Cohort A of customers work at a small company and respond well to a PLG-friendly call-to-action (CTA) like "free trial." They have ownership over the decision (end-user and buyer) and can decide quickly.

Cohort B of customers are enterprise users who work at a large company. Their companies have specific security and procurement processes that must be followed when they bring on a new vendor.

Both are high-potential, high-lifetime-value customers with very different needs from the website.

The TL;DR

- Marketers need to turn their ficus on efficiency in 2023. This means predictably converting your current demand into pipeline
- Marketers can increase conversions and generate higher-quality inbound leads through the website by experimenting with personalization at scale
- Tools like Mutiny help you segment and personalize messages on your website to meet your target audience where they are.

Website personalization at scale

Using first and third-party data, you can create customized website experiences for each cohort and run experiments to increase conversions. This is how Mutiny users can unlock personalization at scale to drive conversion.

The website personalization playbook can help improve sales, reduce churn, and create a holistic experience for each buyer persona.

Case study: How Mutiny helped Sprig increase conversions by 95%

Sprig, a customer journey tool, identified that their enterprise segment of website visitors was converting at a lower rate than their self-serve prospects. There was a natural fit for a PLG motion with their end-users, so they built a self-serve trial motion for SMB customers. Companies with less than 150 employees got served with the free trial experience, while companies with over 150 employees were funneled into the sales-led motion where they were served with a "book a call with sales" CTA.

They saw an increase immediately in the free trial conversion (95% lift due to adding the word "free" to their CTA) and the booked calls metric, which had an incredible lift in the enterprise segment.

Want to try this playbook?

Step 1: Define customer segments

Analyze historical data to identify a cutoff point in company size based on won and lost deals. You'll have to bring on folks outside the marketing and growth teams for this analysis. Plan to loop in leadership and sales to get alignment on these segments.

Step 2: Segment traffic through acquisition channels

After segmenting the audience, define your best channels for reaching and engaging them. Create personalized landing pages for each segment and build an SEO plan with keywords that will attract each segment to that page. You can also run paid ads to target your different audience segments.

Step 3: Personalize website content for each

Offer different CTAs, messaging, and value propositions depending on the audience. Getting super clear on your website journey and matching CTAs to the specific end-user is essential. For example, when Sprig changed its CTA for SMBs to "start for free," at first, they saw a decrease in conversions because prospects were taken to a landing page that was very similar to enterprise, with wording that made it seem like they had to schedule a demo before they could get started.

Once they had separate landing pages for each segment instead of generalized language, the trend reversed! Conversions increased as their SMB segment was prompted to answer a few questions before starting their free trial.

When getting started with website personalization, you want to focus on high-traffic and high-intent pages. People are usually inclined to begin work on the worst-performing pages — but that's often a mistake. If your site is already converting, the intent is there, allowing you to get to statistical significance, prove your hypothesis, and reach ROI faster.

Keep experimenting

Don't stop at just splitting the experience between enterprise and SMB. You can run infinite tests depending on how granular you want to get with each of your segments. You can create PLG motions that are very specific, i.e., healthcare vs. insurance. You can test messaging, buttons, CTAs, and more. The key is to work backward - think about the situation your buyer finds themselves in and start piecing together all the value props relevant to that person.

You don't need to make a whole new website to try and get it right. Instead, start small and build on your learnings. For example, try changing the header of the landing page; if conversions lift, you can keep changing the rest of the website. The truth is that personalization doesn't work unless you're willing to experiment a lot.

One thing to keep in mind is that since you're splitting experiences, the outcomes you're measuring might not be the same for each group. For example, if you're creating a homepage with a "book demo" CTA for your enterprise audience and comparing it against a homepage for SMBs with CTAs to start a free trial, both of those outcomes count as conversions for the sake of your experiment, but they provide different results.

Ready to get your website up to its full conversion potential?

Remember, the best way to test your hypotheses is by starting with low-hanging fruit — the pages getting high traffic volume. Don't stop at dividing the experience between two general cohorts. Get more granular and specific with your segments based on the results from the initial test. Every detail matters. Ensure your CTAs speak directly to each audience and match the visitors' intent. If you don't see an immediate increase, don't give up! Getting segmentation right can be challenging, but after a few trials and A/B tests, you'll be well on your way to an optimized website.

IMPROVE WEBSITE CONVERSION WITH INTERACTIVE DEMOS

Natalie Marcotullio

Head of Growth and Operations at Navattic

Not ready for self-serve? No problem. Try an interactive demo to improve conversions.

Can you be product-led without a self-serve product?

It's no secret that every SaaS company wants to be more product-led. There are many benefits to having a self-serve product: it lowers the cost of acquisition, accelerates the sales cycle, and can even improve retention. The problem is that not every product is easy to self-serve, and some shouldn't be self-serve. This usually happens for two reasons:

1. Your product applies to multiple use cases making it difficult to get started.
2. Your product has a complicated setup process that delays value.

When self-serve isn't an option, how do you prove value to potential customers without spending valuable sales resources on demos? This is especially challenging in a PLS motion where you're trying to delay a human touch until further down the funnel.

I've seen this problem grow more prevalent as go-to-market models have transformed. Buyers want and expect to touch and feel the product earlier in the sales cycle.

The TL;DR

- Product-led is all about introducing product interaction earlier in the user journey. This can be a daunting task for complex products or companies that have been traditionally sales-led.

- Interactive demos have become a helpful tool for companies transitioning to self-serve products or for companies that may need help to offer a fully self-serve product experience.

- Put product earlier in your user journeys to improve website conversions, demo conversions, and opportunity creation.

Use product tours to drive self-serve sign-ups and educate potential buyers

A mini product tour that shows the most significant features will increase self-serve sign-ups and provide valuable product education to your audience.

Navattic exists because software buyers are getting savvier and want more ways to interact with products, especially earlier in the funnel. Buyers also want more ways to self-educate on how to use products. This meant we needed to create a way to educate at scale without hundreds of sales reps or a self-serve product.

I've seen two approaches work well:

1. Offer interactive product tours directly on your website to increase free trial activation.
2. Give potential buyers the keys to explore the product and get a feel for your value for free by linking to a customized interactive demo in sales outreach emails.

Want to try this playbook?

What you'll need

1. Product-market fit so you can drive inbound traffic to your website.
2. An interactive demo platform (like Navattic) to create demos with HTML screenshots.
3. Sales team to engage with interactive demo leads.
4. Marketing sequences to nurture interactive demo leads who are not yet ready for sales.

Step 1: Get the right teams involved

You will need to engage with three teams: growth, product marketing, and sales. Generally, the growth team owns the strategy, product marketing collaborates with sales to build out the demos, and sales works to integrate the interactive demos into their sales process.

Step 2: Align on a time to run the experiment

Companies that'll see the most significant results are in the growth stage, have product-market fit (PMF), and have a solid user experience and user interface (UI/UX) ready to be shown to the masses. Later-stage companies can also benefit from a more scalable way to educate their customers and prospects on the product's value.

Step 3: Define goals for your interactive demo

It's essential to start each playbook with clear north-star metrics. In this case, it's no different. Think about the ROI you want to see from investing time and resources into creating product tours and encouraging their usage.

What's the increase in conversion rate you want to see? How many more leads are qualified after seeing the product? Are you also considering indirect goals like awareness and product education on a larger scale? Ensure you have clarity on your primary objectives and how you can measure success post-launch.

Step 4: Define who you are targeting and segment your tours accordingly

You can create targeted experiences, depending on your audience, by showing each segment the features that will be most valuable to them. This is especially helpful if you have a robust product that tackles different pain points or departments, like Hubspot.

I suggest constantly analyzing product usage data to understand the most important features for each segment. Then, make sure to incorporate these insights into your product tours.

Step 5: Storyboard the tour

Using a mix of qualitative and quantitative data, decide what features to highlight and in what order they should be highlighted.

Qualitative

Ask your sales team:

- What are the moments of a demo where prospects' faces light up?
- What are the features that prospects get really excited about?
- What features best differentiate your product?

Quantitative:

Ask your sales team:

- What features do top-activated users use the most?
- What features correlate best with conversion, engagement, or NPS when leveraged consistently?

It's important to balance being prescriptive with being open so that users can "choose their own adventure". Give them options to explore different parts of the product using a checklist or by asking them what they're most interested in at the beginning of the conversation.

Step 6: Build the tour in a tool like Navattic

Using a tool like Navattic, you can create guided tours quickly and efficiently while simultaneously tracking usage. I recommend keeping product tours short by focusing on the features that matter the most to your target segment and including a dual call-to-action — i.e., "keep exploring" and "sign-up for a free trial" — every 5 to 6 steps.

Step 7: Analyze the data from tour clicks and conversions to make improvements

Qualify the leads generated through the product tour as you would PQLs. Navattic can send interactive demo data to tools like Salesforce or HubSpot to create different workflows. For example, with Navattic data, you can see:

- Users that go through the entire demo
- Users that go through the demo more than once
- Drop-off rates and places
- Functionalities users are most interested in

You can use this information to create a follow-up strategy like nurture cadences, sales touch points, and pre-call discovery by tailoring outreach to the features that saw the highest engagement. You can iterate on your tour based on where users spent significant time, skipped, or dropped off.

Takeaways

1. Self-guided product tours can help you speed up your sales cycle. They're a solid alternative for products too complex for a self-serve path.
2. For the best results, create different tours highlighting features that match each of your segments' value props.
3. Measure results by paying close attention to conversion rates from product tour to demos booked and product tour performance: drop-off, features explored, and amount of visits.

THE SALES-ASSIST APPROACH FOR PLS COMPANIES

Kim Walsh

Advisor and SVP of Sales, Partnerships, and Customer Success at Apollo; former long-time GTM leader at HubSpot

As an advisor and SVP of Sales, Partnerships, and Customer Success at Apollo and former long-time HubSpot employee — where I worked my way up to Global VP of GTM Partnerships — I've learned much about operationalizing a Product-Led Sales (PLS) motion.

Making your PLS motion successful lies in the foundational elements: great people, solid playbooks and training processes, clear metrics, and a laser-focus on data-informed, consultative sales touches.

In this article, I'll cover each of these core elements and the playbook for applying your consultative, relationship-building sales approach to creating a PLS partnership business unit.

HubSpot's consultative sales-assist motion

I joined HubSpot's sales team in 2010 as an inbound growth specialist when the company had around 80 people and $10 million in revenue.

> It was really important to us at HubSpot that we were always helping, being super consultative, and building trust. That was our number-one thing.

At the time, I was fortunate to work alongside former HubSpot CRO (and current advisor) Mark Roberge to create and run the upmarket, hybrid, and proactive GTM motions that shaped and grew the sales organization in its formative years.

Before sales-assist teams were popularized, we were running a similar motion. But, even if sales-assist as a term was around at the time, HubSpot might not have used it because it has the word "sales." One of Mark's ideas was to call salespeople "growth specialists," which aligned with the "not sales-y" culture at HubSpot.

Instead, the focus for sales was on being consultative.

One of the best ways we achieved this approach was by asking a critical question that resonated with our ICP, in our case, marketers. I still recommend companies ask something similar today:

💬 **What is your biggest marketing challenge?**

The answer told me, and other sales reps, what amount of time and care each lead needed based on the size and complexity of their "biggest marketing challenge." With this question in play, the deals started rolling in — reps were closing from 15 to 20 new deals monthly.

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Here are the steps that helped this consultative, sales-assist-like motion succeed at HubSpot:

1. Lean on your inbound motion

HubSpot set up inbound flows that:

A. Identified ideal customer profiles (ICPs)

B. Segmented them by challenge: lead gen, marketing analytics, marketing automation, etc.

2. Initiate discovery with ICPs

Once high-value leads were identified, HubSpot's growth specialists set up 30-minute qualifying calls called Inbound Marketing Assessments. We went into these calls with an "informed but curious" mindset.

We knew the lead's contact history and understood their main challenge well. (Today, we'd also have PLS signals with a tool like Pocus!) The first question was, "how can I help you today?" That's what set the stage for a relationship based on consultation.

3. Set up demos

The next step was demoing. HubSpot figured out that the most effective discovery → demo → deal flow happened when they had at least five different roles from the lead's side on the call.

Holding out for this number of roles on the call further helped solidify purchasing intent, saved reps' time conducting demos, and shortened the sales cycle.

4. Measure success

At HubSpot, the demo-to-close rate was our measure of sales success, which leads me to the importance of often-overlooked metrics.

NOTE

Sales-assist is the unsung hero of revenue attribution

Which of the following channels drive the most revenue for your business?

	Total	Score	Weighted Avg
Self-serve	90	2.86	1.811
Sales-assist (product / onboarding specialist, product advocate)	93	2.97	1.549
Traditional outbound sales (AE, SDR, BDR)	86	2.93	1.756
Customer Success	90	2.28	2.356

Source: 2022 PLS Benchmarks Report

Sales-assist ≠ no sales metrics

Some might think taking a culture-led, consultative approach means you don't measure success using cold, hard sales metrics.

However, that was *not* the case at HubSpot. We had honed our techniques so well that we knew our consultative approach enabled sales to hit quotas.

Sales leaders stayed *very* informed of the rates at which their teams were closing PQLs, MQLs, and other leads. In addition, they also tracked many of the same sales metrics we still use today:

- Calls made
- Emails sent
- Talk time
- Discovery calls
- Demos
- Win rate
- Days to close
- Annual contract value

HubSpot also published a visible waterfall chart that was updated daily, giving the whole team transparency into sales performance.

So while it was undoubtedly a helpful, consultative environment, the measurement was accurate, and the bar was high — and performance plans were enacted for anyone falling behind.

Hiring and training a sales-assist team

Looking to build a highly consultative sales team with a less sales-y approach?

The key is looking for folks who are *not* traditional salespeople.

HubSpot often hired people who had never done sales, such as teachers or people who worked in non-profits.

The profile for a consultative salesperson was someone who was:

- Coachable
- Hungry for knowledge
- Ambitious
- Curious

How did we ensure that people who may have didn't have sales experience had the chops and the product knowledge they needed?

Training and onboarding were done academically to ensure every hire had deep product expertise.

Every person working at HubSpot had to learn the product inside and out during their 30-day onboarding period. They had to develop a business idea, rank for keywords related to this idea, get HubSpot certified, learn how to set up sequences, and take an inbound marketing test.

I still encourage a thorough process similar to this one to ensure that the reps selling your product are indeed product experts.

> "The mantra was: It doesn't matter what we sell, it's how we sell it. It was so fun to sell at HubSpot because you never felt like you were shoving something down someone's throat."

The secret to successful Product-Led Sales: Great people

Something I enjoy the most about the PLS approach is the human element.

I saw it at HubSpot, and I'm watching it happen at Apollo — the human touch has vast potential to accelerate sales.

How much of your self-serve revenue is renewing *without* the *human* touch?

How many users have discovered new features of your product *without* the human touch?

How many users learned about different product offerings *without* the human touch?

You can build a fantastic self-serve business, but for most companies, there are limitations to automation within the product. When applied correctly, sales folks are necessary to drive a positive customer experience and accelerate revenue.

The playbook for PLS partnerships

A consultative, relationship-based approach doesn't only have to apply to your sales motion. I've also witnessed great success with PLS partnerships at HubSpot and Apollo.

When I was Head of Enterprise Sales at HubSpot, we first built the GTM partnership organization as a critical strategic moat initiative. Eventually, that effort turned into a global business I helped grow from $1 million to $200 million with thousands of partners and an excellent internal cross-functional team.

One of the best things about partnering up with other businesses is the new, unique marketing that results. Partners typically share messaging about your company, use your product in a public-facing way, create co-marketing, feature your product in their marketplace, and recommend you as one of their trusted partners.

At HubSpot, the partnership approach was treated like a separate business within the org. Within partnerships, 60% of the revenue resulted from self-serve leads coming in from that partner's marketing channels. Another 10% came from the sales-assist motion, and the last 30% was rep-driven.

Smart partnerships can kick off the PLS flywheel.

What's the playbook for getting your partnership program off the ground?

1. Choose your partnership type(s)

Agency consultants, startup partners, tech integration partners, and affiliate partners are the popular options for partnership types.

2. Define ideal partner profile

How do you know which integration partnerships are ideal for your business?

Form a profile based on overlap and value by asking:

- Does this fit into our industry?
- Do our customers know and trust this tool?
- Will this partnership positively impact our customer base?
- Will this help us tap into a new channel or market?

3. Choose specific partners

With that profile and list of questions, start somewhere like G2 to find specific partners that align with your values and goals.

4. Build

Launch a marketplace or other ecosystem where you will feature your partner program. Then, start contacting the companies you want to partner with to begin the relationship building.

Recap

Consultative ' everything: Sales should ask a question like Hubspot's killer consultative one-liner, "What is your biggest marketing challenge?". Asking a question that resonates with your ICP can begin a consultative, trust-building, sales-assist-like approach.

Don't forget metrics: A consultative approach doesn't mean avoiding measuring success using real sales metrics.

It's all about people: PLS success is all about the human touch. Hire folks who are coachable, hungry for knowledge, ambitious, and curious. Onboard them well, train rigorously, and measure performance to help everyone improve.

Build revenue stream with PLS partnerships: Choose your program type, define ideal partner profiles, and start building the ecosystem and relationships.

MAKING OUTBOUND WORK AT YOUR PLG COMPANY, FT. CLICKUP AND TRUSTPAGE

Kyle Poyar

Operating Partner at OpenView, covering all things PLG on the Growth Unhinged newsletter

This article originally appeared in Growth Unhinged.

The product-led growth (PLG) motion starts with the end-user.

A healthy PLG engine depends on these users discovering your product through no- or low-cost channels, including:

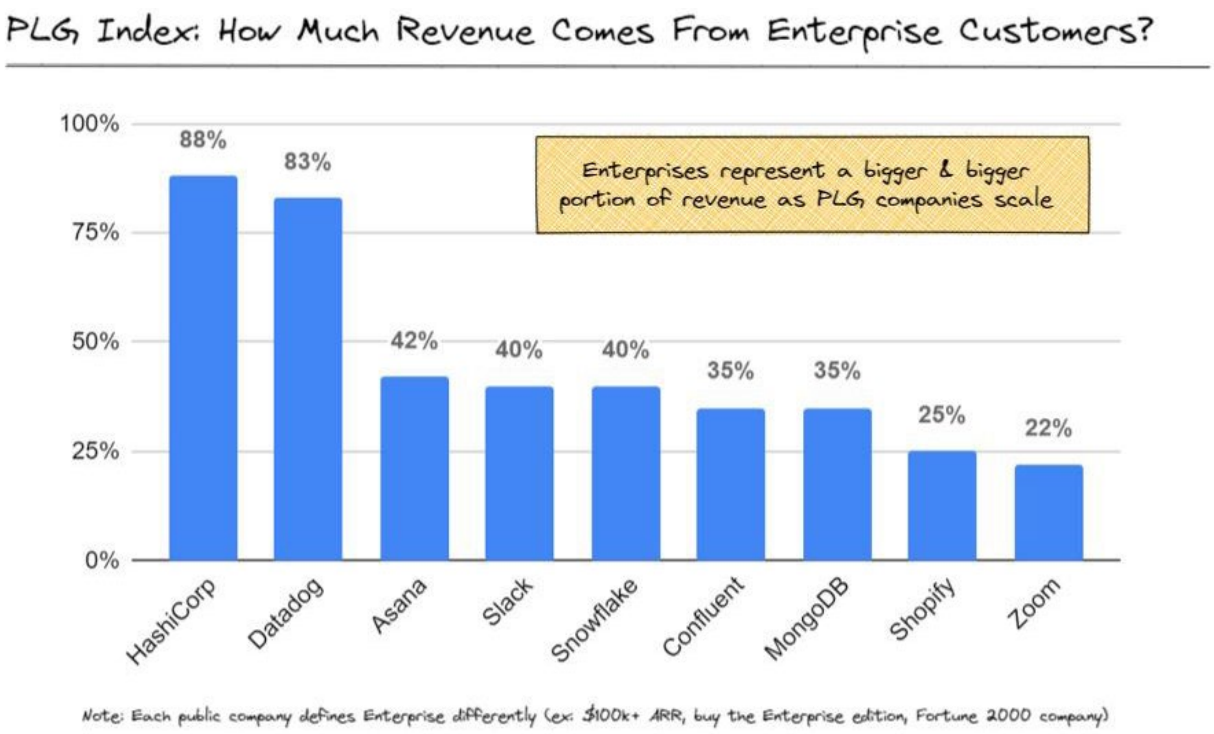
- Word-of-mouth
- Organic search
- Product virality
- Communities
- Marketplaces

But as PLG companies grow past $10M ARR, your larger accounts start to drive a disproportionate amount of revenue and incremental growth. Enterprise customers represent 88% of revenue at HashiCorp!

(Disclaimer: Every public company defines an enterprise customer differently. For some, it means $100k+ in ARR; for others, it might mean a Fortune 2000 company.)

These accounts typically begin their journey with a product interaction before talking to sales. You'll manage to close larger and larger deals by simply allowing users to opt into a sales-led path or by adopting a product-qualified lead (PQL) playbook.

Then folks will notice that there's still more juice in the lemons. You aren't capitalizing on all of the potential enterprise demand for your product because you're...



Data source: OpenView analysis of PLG company S-1's and earnings releases

- 🛑 Getting stuck with users: Your enthusiastic users might be unwilling or unable to convince their boss to buy your product. How can you help convince the boss that your product creates real business value?
- 🔎 Missing opportunities: Users might churn because their company decided to buy a competitor product (Slack vs. Microsoft Teams, anyone?). You never knew there was a bigger opportunity to be won because you weren't talking to the right folks.
- 🏝 Being siloed in a large organization: You might even successfully convince a team or division to buy your product. Still, many other teams or divisions likely don't know your product exists — and may never know if you don't educate them.

It's no wonder that PLG companies contemplate introducing an outbound motion.

Data from PeerSignal indicates that a whopping 54% of PLG companies on their B2B Tech Hiring Tracker are looking for SDRs or BDRs. This list includes well-known PLG companies like Figma, 1Password, Vercel, and Notion.

PeerSignal Co-Founder Adam Schoenfeld explains that while the SDR model was popularized from ABM and classic outbound motions, it also has a place at PLG companies — although it doesn't look the same.

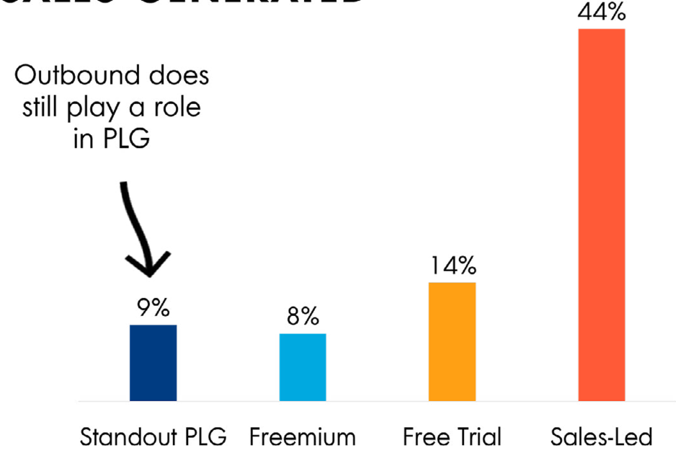
Instead of hunting for contact information for cold outreach, SDRs are armed with usage data to help identify users or groups that would benefit from a paid subscription.

Sales generates almost 10% of new sign-ups, even at standout PLG companies, according to OpenView's 2022 Product Benchmarks report. Since larger accounts tend to pay more, we can assume sales generates more than 10% of new revenue.

At the same time, there are real challenges to going outbound in a PLG company:

- 💰 Outbound will increase your CAC payback, especially in the short term.
- 📏 Outbound will come with potential attribution friction between sales, marketing, and product growth teams.
- ⚔ Outbound can exacerbate tensions around how much to prioritize PLG efforts versus outbound and enterprise-focused efforts.

SIGN-UPS BY CHANNEL: SALES-GENERATED



Source: OpenView's 2022 Product Benchmarks survey of 450+ companies

To help unpack the topic of making outbound work at your PLG company despite the challenges, let's explore what outbound looks like inside two impressive PLG companies: ClickUp and Trustpage.

Read on for tactical advice about going outbound without compromising your PLG roots.

Case study: Outbound at ClickUp

Not too long ago, ClickUp raised [$400M Series C], bringing in an average of 10,000 signs up daily.

[Kenny Vincent], former Global Director of Sales at ClickUp (and current independent investor, advisor, and consultant), told me that ClickUp doesn't rest on its self-service efforts. Instead, the company focused on scaling its sales team to generate revenue and realize its vision faster.

Sales at ClickUp includes two different outbound efforts:

1. Outbound that's part of ClickUp's PLS motion

In the [Product-Led Sales (PLS)] motion, AEs and SDRs work with accounts with one or more ClickUp product users. When somebody signs up for ClickUp, the domain is added to ClickUp's system, and any users are added to Salesforce. The PLS teams wait for those users to become PQLs before initiating outreach.

Once someone has become a PQL, reps need to work the entire account, not just the lead/user. That means engaging with existing users, encouraging them to invite their teams, engaging in pure cold outbound to high-value users, and going top-down to complement the bottom-up traction.

Here's what the sales process might look like in practice:

1. The marketing manager at Company A signs up for ClickUp ➡️ domain and gets added to Salesforce.
2. Marketing Manager becomes a PQL ➡️ ClickUp rep gets assigned.
3. The outbound rep prioritizes building rapport with the Marketing Manager and encourages them to invite the entire team ➡️ "I'll train your team on how to use ClickUp for free."
4. The rep identifies other executives in the company that align with the ideal customer profile (ICP) ➡️ "Your team is already using ClickUp; would you be curious to see how?"
5. The outbound rep works the entire account — not just the marketing manager — to catalyze a larger deal ➡️ Use case development and top-down targeting.

2. Cold outbound to target accounts.

ClickUp has a second outbound team that does cold outbound to target accounts. This looks more like a traditional outbound motion:

- Pull lists, target accounts, and contacts from those accounts. ClickUp targets stronger verticals and looks for contacts in their ICP

(ex: executives at midmarket/enterprise companies in engineering, product, or design).
- Use intent information from ZoomInfo and Clearbit (ex: you can identify domains that have visited your pricing page, then pull lists of top executives there).
- Run dynamic sequences in Outreach or Salesloft with 6 to 9 touches.

At ClickUp, the cold outbound team during Kenny's time was relatively small, at 10 to 12 people. It can take longer for these teams to see traction, generally 6 to 9 months, so it's best to start small and then scale.

How the two outbound efforts compare

Kenny told me that a 2 to 4% lead-to-close conversion is standard for a cold outbound team targeting the midmarket, with a lead being anyone who responds to an email. To put this in perspective, the PLS motion sees a whopping 10% conversion from lead to close.

Case study: Outbound at Trustpage

Trustpage is at a very different stage from ClickUp, having raised a [$5M Seed round] in November 2021. But a lean team hasn't stopped Trustpage from testing an outbound motion.

[Mara Willemin], former Director of Product-Led Sales at Trustpage (and current Strategic Account Executive at Vanta), told me that outbound plays a very important role in their revenue mix — but it doesn't look like a traditional sales-led outbound strategy.

She said that at PLG companies, the outbound strategy should use the product-led aspects of the user experience to drive value in every touch point. This is broader than simply tweaking your email copy to book more meetings.

At Trustpage, outbound efforts focus on driving product adoption of their free version. This is meant to add value to both the buyer (who wants a secure solution) and the vendor (who wants to highlight their security posture to shorten the sales cycle).

"We've built an AI-based web crawler that allows us to compare the security policies of buyers' favorite tools and vendors side by side. By sending these comparison links directly to prospects at large enterprise organizations, we provide GTM teams with a resource to drive competitive advantage via security in sales conversations. For companies who want to update or enhance their information, this drives them directly into our core Trust Center product and kickstarts our PQL journey.

"While our goal is always trying to drive product adoption, our intention in the outreach is to drive value and create a more trusted security ecosystem in the space, regardless of if they use Trustpage to do so or not," Mara said.

Outbound challenges to be prepared for

The primary challenges to going outbound at ClickUp and Trustpage reflect what many in the PLG space think about when adding this sales approach: messaging and attribution.

Here's how to manage both.

Message-experience alignment

From Mara's perspective, the biggest challenge for PLG companies when going outbound is to ensure that the messaging reflects the product experience your team has created.

“You must go to market with the copy of a marketer, the experience of a product manager, and the heart of sales.” — Mara Willemin

You're looking for the SDR to wear several hats — an especially big ask for someone typically early in their career. Mara suggested pulling in other team members for help writing or editing the outbound copy.

Mara strongly recommends that folks investigate having SDRs send messages from a different alias or test the message with the subject matter expert on your team. While this comes up most frequently with developer-focused buyers, it's more broadly applicable than that.

Kenny added that having separate messaging playbooks for product users vs. executive buyers is essential.

- Product user messaging is value-driven, helping individuals achieve their objectives and find value in the product.
- Executive buyer messaging is about broader company benefits.
- There's a personalized message (ex: “You have five users, and they have 150 projects, I'd love to tell you how they're using the product and benefiting from it.”)
- And a more traditional outbound message (ex: “You can save costs and consolidate vendors by using an all-in-one platform.”)

“You must go to market with the copy of a marketer, the experience of a product manager, and the heart of sales.
— Mara Willemin”

Handling attribution

And, of course, there's always the attribution question.

🤔 What happens if an SDR reaches out to a prospect who later signs up for a free version or buys via self-service?

Kenny said some scenarios are fairly clear-cut, but others are far less.

"If there's a first touch to an executive at a company, and then that executive signs up, it's pretty clear that the outbound generated the sign-up. Then there are times when someone reaches out, and six months later, there's a web form filled by that account, making attribution harder," Kenny said.

With that in mind, ClickUp's cold outbound team tends to focus more on activity-related metrics. The product-led outbound team focuses more on conversion and revenue goals because they have a steadier pipeline of leads from accounts already using the product.

Mara urges PLG companies to "treat their buyer experience as the North Star" to guide attribution decisions.

For this reason, she said she believes that SDRs should be compensated in these murky situations, although perhaps with a different incentive structure. Otherwise, SDRs would be incentivized to drive old, sales-led tactics of outbound engagement, which only compromises the buyer experience.

"Similar to AEs in PLG environments, you may want to offer an SDR a smaller commission for driving a product sign-up and then part of any expansion opportunities within the next 6 to 12 months. For an SDR, this could mean additional commission for a booked demo or a small revenue share of the booked revenue," Mara said.

Key takeaways

- Plan for outbound and an SDR/BDR function to be part of your go-to-market mix, especially once you scale beyond $10M ARR.
- Your lowest-hanging fruit is for SDRs/BDRs to work with accounts already using the product. They can have up to a 5x higher lead-to-close conversion rate.
- Work the account, not just the user/lead. You need to document the use case and get to the decision-maker.
- Tailor your messaging to the audience and their product experience. Great product-centric messaging is usually a team sport.
- Treat your buyer experience as the north star when making attribution and compensation decisions.

HOW RETOOL USES SALES TO LAND, EXPAND, AND RETAIN

Eleanor Dorfman

Sales Leader at Retool, former GTM expert at Clever and Segment, passionate about building teams in early-stage startups

I've *always* been excited about building new go-to-market functions at early-stage companies.

I joined Retool, a platform for creating internal user interface tools on top of databases and APIs, as Sales Leader in November 2020. At that point, there were only a few people across our account executive, sales engineering, and sales development teams. Today, each arm of our sales org has grown exponentially — and we continue to add to it.

Previously at Segment, I also worked to build out the customer success operations team before pivoting to creating an expansion sales team, renewals team, and a new business sales team.

Clearly, I'm excited about building up teams and companies with product-led growth (PLG) motions.

In this article, I want to walk you through how we use sales at Retool to hit our land, expand, and retention goals, including:

- A peek at Retool's sales process, featuring DoorDash
- Retool's primary sales channels: inbound, outbound, self-serve conversion, and expansion
- When to layer outbound into your PLG motion
- How to deploy GTM teams across every customer lifecycle stage
- The best North Star Metric for SaaS

Retool's sales process (ft. DoorDash) 🚘

To exemplify what the sales motion typically looks like at Retool, I like to tell the story of when DoorDash came through one of our inbound channels.

A couple of years ago, DoorDash approached Retool with a problem they needed help solving: They wanted a more efficient way for their operations team to turn off deliveries to specific zip codes during dangerous storms.

At that time, their process was handled ad hoc. People would first submit tickets via Jira, and then an engineer would have to get involved. This system couldn't match the urgency of the situation, and it made little sense to have a team of engineers at DoorDash's home office responding to weather issues around the globe as the company scaled.

To save time building a solution from scratch, they came to Retool to quickly spin up an internal tool to meet this critical need.

At first, they just signed a small contract. But, thanks to our sales process at Retool, they've engaged us to build as many as 60 apps for many different teams. With ongoing, in-depth account management, Retool keeps finding new teams and new use cases where we can solve problems for DoorDash.

When DoorDash is considering new products, one of their key planning steps is consulting with us at Retool about what kind of tooling they can provide to support new additions.

Retool's primary sales channels

At Retool, AEs work primarily within four sales channels:

1️⃣ Inbound leads that come directly to the sales team
2️⃣ Outbound leads that come from account execs or business development reps
3️⃣ Conversions from the self-serve motion
4️⃣ Expansion of existing customers

Let's dive into each of these.

Inbound

Inbound leads at Retool typically come directly to AEs from demo requests. Often, these are from people who know they will need enterprise features — advanced integrations, security, etc. — and want to go right to the source and talk to someone.

Outbound

This one is simple. Outbound leads usually come from AEs reaching out to VPs of engineering, directors of engineering, internal tools teams, data engineering teams, and other teams they know will benefit from Retool.

Self-serve conversion

About 80% of Retool's customers come from our self-serve business. In 2021, 20% of the revenue our AEs booked came from self-serve conversions, so our AEs are primarily focused on nurturing and expanding accounts.

There are typically two tipping points where self-serve customers upgrade to a higher pricing tier:

🔊 Volume

Once businesses are using enough seats in Retool that they're ready to move off of a month-to-month plan and make an annual commitment, either they'll reach out, or their AE will start the conversation around a volume discount on a yearly contract.

🧐 Sophistication

Usually, when a company reaches around 500 people, they want to use more sophisticated tools to manage the platform they built in Retool. At this point, they're often ready for a discussion about upgrading their accounts.

Expansion

There are a few different methods we use at Retool to uncover expansion opportunities:

Hackathons

For us, hackathons with customers have unveiled *tons* of new use cases in other departments. Plus, they're fun!

Webinars

We help customers host internal tech talks where engineering can present an app to the rest of the organization they created with Retool. We'll then step in and follow up by offering office hour sessions, where we often see new departments from across the org start engaging with Retool.

Outbound

Sometimes, if a customer has already built a tool that could be useful across the business, our AEs will shop that solution around to other departments within the same company. If that seems intrusive, the way I think about it is that no one should *ever* apologize for talking to their customer.

Tip: the best time to layer outbound into the PLG motion

Considering Retool's roots in the bottom-up PLG motion, you might not have expected to see outbound as one of our primary sales channels.

For the extremely *rare* Slacks and Dropboxes of the world, the answer as to when to layer in outbound might not be for a long time. But for the rest of us, the best time to add an outbound motion to the PLG approach is about a year before you need it.

Retool started going hard on outbound at the beginning of 2022 when about 60% of the previous year's revenue was still from inbound.

I knew it would take six to 12 months to spin up a successful team, the right ideal customer profile (ICP), the best incentive program, the perfect messaging, and all the associated systems. So it was vital for me to get things going while our AEs were still generating reliable revenue growth via inbound — but also had room to grow with a new outbound motion.

Handling handoffs in the sales motion

While there are many different ways to split up who handles what within a sales org, we optimize for simplicity at Retool.

Here's our protocol:

Account execs keep the customers they close, remaining responsible for them through renewals and expansions. They stay involved with each account they close, even as those accounts roll into activation and future planning.

The deployed engineering team, a technical post-sale team similar to a post-sale sales engineer, works with customers to build their applications. This is a little different than how some companies handle it. Deployed engineering at Retool is active in shared Slack channels, does paired programming sessions with customers, and even participates in customer-sponsored hackathons.

The customer success management (CSM) team — one of our newer and, therefore, smaller functions — has taken over ongoing product/

project management. This team works with customers to define roadmaps for their Retool use cases.

A team for every lifecycle stage

While some may think that sounds like too many teams all trying to work with the same customers around the same time, the flow works well for Retool because we've carefully crafted these teams to fire at key stages of our customer lifecycle:

Acquisition

AEs and pre-sales sales engineers are experts in discovery, relationship building, negotiation, closing, and asking for money, a fairly important skill set.

Activation

Deployed engineers tactically go in and help new customers get their first app deployed, get integrated with GitHub, get SAML configured, etc. They're also experts at triaging and cycling through feedback.

Adoption

Our CSM team was implemented because AEs were spending excessive time on adoption activities versus generating new revenue.
So, this group is all about establishing Retool across various use cases within the customer's organization.

Growth

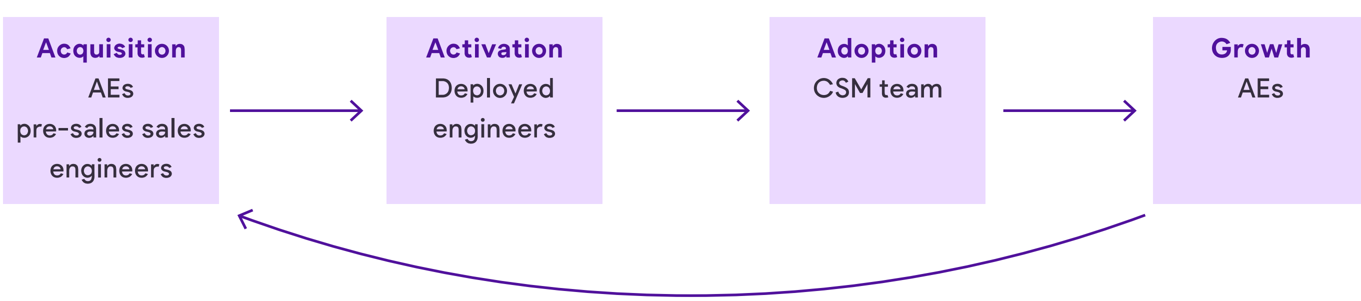
Having each of these teams fleshed out enables AEs to continue focusing on expansion and hitting revenue targets. Each time they land either a new business or expand an existing account, the cycle of acquisition ➡️ activation ➡️ adoption ➡️ growth starts all over again.

Sales comp at Retool

Comping AEs on the initial self-serve purchase was a model I used at Segment, but it's not what we currently do at Retool.

While our process is evolving and has seen varying levels of success, right now, we follow an account pool model.

CUSTOMER LIFECYCLE



In this model, AEs do round robins for unassigned customers. AEs can claim a set of customers they can own and nurture and then put back into the pool. AEs are also empowered to outbound prospects and self-service customers in various ways.

The deployed engineering team at Retool, just like it was at Segment, is comped based on net dollar retention — our North Star Metric (more on that next!) — as well as a few usage metrics:

- Customer's first use case went into production
- Customer's first tool has at leave five end-users (to reward value, not just speed)

North Star Metric: net dollar retention 💫

Things like top-line revenue growth, ARR, and burn are all, of course, *incredibly* important. But I believe net dollar retention (NDR) is the most important metric for SaaS companies.

I believe it's the ability to retain and grow existing business, therefore driving up margins while driving down the cost of sales, that enables SaaS companies to command the high valuations they do. This guided me to set up my sales org at Retool to focus so heavily on expansion rates.

Keeping original AEs involved throughout the customer lifecycle is pivotal to the success of this approach. They know the original buyer on the account. They understand why that person decided to go with Retool in the first place, and they know the business and its struggles and goals — they've become an embedded *consultant* at this point.

> I very much believe NDR is the single most important metric for the long-term success of a SaaS business.

This practice has created a customer-centric culture at Retool, which isn't just key for morale, but a huge boon to our ability to land, expand, and retain.

Recap

Retool's primary sales channels: inbound leads from sales, outbound leads from AEs or BDRs, conversions from self-serve, and expansion among existing customers.

Start layering outbound into the PLG motion about a year before you expect it to be fully up and running.

Position GTM teams around the customer lifecycle stages to nurture and convert customers without fumbling.

Net dollar retention (NDR) is the best North Star Metric for guiding SaaS companies.

SECTION FIVE

DATA MANAGEMENT FOR PLG

How do you make sure your mix of motions don't cannibalize each other? How do you discover which signals qualify a lead as a sales opportunity? When it comes to PLG data, there are a ton of metrics you need to define and analyze to create repeatable workflows to meet your revenue targets.

In this section, you'll learn tactical guidance on lead scoring, forecasting metrics to help you decide what areas of your pipeline to focus on, tooling and processes to keep your data visible and accessible, and how to establish feedback loops between sales, success, and revenue operations.

BUILDING THE PLS REVOPS MACHINE

Eugene Berson

Enterprise GTM leader and current VP and Head of Global Revenue Operations, Insights, and Enablement at Asana

As business complexity grows, so does the need for a business layer responsible for aligning each branch of the go-to-market (GTM) team to the company's revenue goals.

That's revenue operations — aka RevOps.

I understand that RevOps is a newer term for many readers and that the roles, goals, and tooling for RevOps can vary widely from company to company.

Let's begin by exploring how to structure the PLS RevOps machine at your product-led growth (PLG) company, then dive into:

- ✅ Preventing self-serve vs. sales cannibalization
- ✅ Figuring out how to balance investments
- ✅ Building lead scoring and tooling tips for RevOps

What does RevOps look like at a PLG company?

During my time at Slack, I was on the sales operations side of RevOps. I worked primarily on territories, quotas, sales compensation, systems, tooling, and data quality.

Now, at Asana, the way we approach RevOps — and how I think of RevOps more broadly — is that almost anything that touches the pipeline is RevOps. Whenever there's an MQL or PQL, everything related to routing and contact creation is part of the modern RevOps machine.

RevOps' responsibilities include analytics as well as pipeline generation. At Asana, my RevOps team owns MQLs, leads, and contacts. In some organizations, MarketingOps, CampaignOps, EmailOps, etc., all fall under RevOps.

Avoiding cannibalization with self-serve + sales motions

Today, plenty of PLG businesses have robust sales teams, so there are two different pipelines: self-serve and sales-led. Part of my role in RevOps is to keep the rules of engagement between these two pipelines clear.

At Asana, sales only works directly with accounts with 100+ employees, whereas the rest remain in self-serve. This has been a simple way for us to set guardrails on account ownership between teams.

How Asana is standardizing lead scoring and sales playbooks

The sales team at Asana is data-driven and curious, which makes my job as a RevOps leader easier.

Sales often sends data requests for "team creators in the last 30 days" or "users who sent 5+ invites over the last week." They want all this information to put these users into an outreach sequence. Sales *constantly* wants to experiment with highly-detailed data — and I love that about them.

However, on the RevOps side, our job is to hear these creative requests and use that feedback to develop *standardization*.

Standardize to avoid "spammy" playbooks

Our goal is to standardize what data is surfaced to sales and the playbooks they should run to act on that data. This way we ensure that sales doesn't "spam" users, but instead has the systems they need to focus on more personalized, value-driven messages. And, most importantly, to make those sales playbooks scalable and repeatable.

Giving sales data-driven signals is an evolution in the sales approach at Asana. Instead of reaching out to all users on a whim, we're focusing on reaching out to fewer users in a deeper, more personalized way.

Evolve lead scoring beyond PQAs

We are relatively early in our scoring journey — but there is much ambition here. Currently, we do account-based scoring to create equitable territories, but we realize that score is just a snapshot in time. Over the year, territories naturally evolve. That has led us to pursue a new take on the product-qualified account (PQA) — the XQA.

In an XQA, the "X" signifies that the signal could come from any channel (product, marketing website, paid ad). We create a holistic score that considers data across these channels.

We not only surface the XQA score, but the reasoning *behind* that score to sales. It could be that they engaged with marketing content or have a certain depth of usage with the product. We focus specifically at the account level, rather than an individual lead. Our goal is for sales to understand account momentum and potential first, then sales can go and find personas within the account — and tell them the value story.

Up next: Playbooks driven by scores

The next challenge is figuring out playbooks. In an ideal world, there is a follow-on process where the right playbook 📖 is recommended depending

NOTE

TIPS FOR BUILDING THE REVOPS ENGINE

Take the time to identify areas of responsibility, to invest wisely

Don't reinvent industry standards that are working well

Standardize RevOps goals and processes across the organization

Keeping it simple helps make standardization possible

on the "X" in the XQA. Depending on whether it is product-qualified, customer success qualified, or marketing qualified will have a big impact on the type of playbook sales needs to run. To do this, we're working to develop a hub using various tools for our sales dev team where the suggested play matches the XQA type and can seamlessly connect the rep to a template for the best outreach message.

From scratch vs. "Frankensteined:" Two approaches to building RevOps

If you're like me, you walked into a RevOps organization that was already in full swing.

That means you're probably working with structures that were already in place. Because of leadership changes and changes in business models, these structures and systems can feel a little "Frankensteined" together. 🧟

I've had moments where I wanted to just tear it all down and rebuild RevOps from scratch. But, here's what I realized when I set to work untangling and organizing at Asana:

1. Most of the work is in identifying areas of responsibility so you know where to invest.

Talk to every team that touches pipeline to understand their responsibilities and then look for gaps.

For example, our growth marketing team is responsible for driving trial sign-ups. Their responsibility ends with the creation of that trial sign-up and sales dev picks it up from there. However, there was no source of truth on the conversion rate of growth marketing generated sign-ups. We needed that data to inform the feedback loop between sales and marketing. This was a critical gap in our ability to improve lead quality. This is a great example of an area to triage, redirect investment, and make some changes.

2. There are certain industry standards that I wouldn't veer too far from.

For example, at Asana, sales devs have a lead queue where they work. That's clearly the point where their responsibility starts, and it ends when they make a handoff to an account executive. This is pretty standard. It works for many businesses, and it works for ours — so I'm not going to spend energy reinventing the wheel.

3. RevOps should be driving towards standardized processes across the organization.

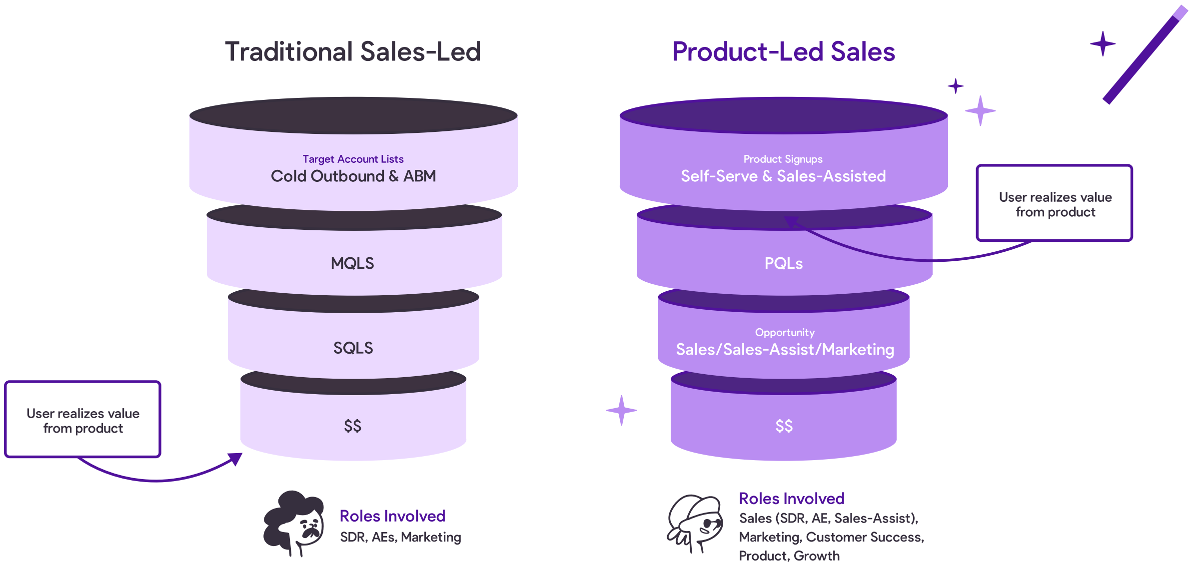
I personally think RevOps should be as united as possible, even across different offices and regions. Of course, there's only so much you can do on this front if you're coming into an established team and business.

How Asana uses the data warehouse

Not all RevOps teams feel comfortable getting into the data warehouse, but at Asana, our RevOps

SO WHAT'S THE PROBLEM?

With PLS, the entire go-to-market motion transforms



team gets their hands dirty when it comes to product usage data.

Today, we pipe product usage data into Tableau, our business intelligence layer. We have pretty sophisticated product data dashboards — and are beginning to surface them to sales in Salesforce.

RevOps will typically build the dashboards, while our data infrastructure and integrations team own defining and surfacing those metrics to our team. For example, I can go to the data team and ask for information like paid seats over time, active users, ARR and they will connect that data to Tableau.

One of the challenges for PLG companies is connecting the dots between sales and data teams. The data and analytics teams tend to think about things from a team or user-based perspective, while sales and GTM folks think about everything from an account perspective. My job in RevOps is to understand where both are coming from, translate a bit, and create a common language based on the data.

That's why the data warehouse is essential as your source of truth.

The challenge for Asana, and I'm guessing for *most* businesses using data warehouses, is getting Salesforce and other platforms to jive with the data warehouse completely.

Currently, all of our data is not visible in Salesforce. However, I would like to democratize that data so that non-technical teams can report on it — without learning the intricacies of Tableau or running SQL queries.

Empower your GTM with a Modern PLS RevOps function

Optimizing GTM processes, and therefore optimizing revenue, is core to what makes RevOps critical for modern businesses.

Modernize your PLS RevOps org by focusing on standardization, clear guardrails around self-serve and sales motions, and advanced scoring and playbook tooling.

THE REVOPS GUIDE TO TRANSLATING GTM NEEDS INTO DATA

Taylor Lint

CEO and Founder of Swantide, former engineer

It's a new generation of RevOps

Revenue teams have changed *drastically* over the last five years.

We've gone from sales, marketing, and customer support existing as isolated teams to working cross-functionally towards unified goals under one Chief Revenue Officer (CRO).

The change in title to RevOps from SalesOps or MarketingOps also reflects how these teams operate as one today.

RevOps is one of the fastest-growing job titles on LinkedIn. As such, it's got a seat at the table for the first time in a long time. This well-deserved seat calls for more strategic RevOps professionals who think about big-picture data, not just day-to-day Salesforce activity.

This evolution of RevOps calls for data and tools to work together like they didn't five years ago, which comes with its challenges. It's become complex to make Salesforce and dozens of other internal software tools collaborate to effectively collect and deploy GTM data.

Swantide automates the management of the go-to-market (GTM) tech stack.

Today that looks like helping early-stage companies get up and running with their sales tools. Soon, we'll also help with marketing tools. Long term, we have our sights set on helping manage tools across the *entire* revenue team.

Between my time as an engineer and my teams' experience across the GTM space, we've seen how RevOps has evolved over the last decade. In this article, I go over the responsibilities of this new generation of RevOps, the challenges it introduces, and how to set up a successful tech to overcome them.

Challenges with the modern GTM tech stack

The RevOps function has become both a strategic and highly technical role. As the revenue tech stack gets more complex, so does managing and extracting unified insights from multiple data sources.

Data visibility: One of the biggest challenges is maintaining visibility into all the different tools that power the revenue engine in a way that's effective for the GTM team. That's why Swantide is building the same type of tooling engineers have had for a long time — but to help RevOps teams manage their systems.

RevOps teams need to see and understand how a change in Salesforce impacts the system as a whole.

Change management: You will *always* be configuring and managing your tools. It's not a one-and-done activity because most businesses aren't going to set up their sales process and get it right on the first try. Even if they did, the workflows you build now are different from the ones you'll use throughout the lifecycle of your business as you scale.

Access to technical resources: We all know go-to-market teams tend to be lower on the totem pole when getting engineering resources. So, you're often left depending on your expertise to make changes.

The problem? Someone without a technical background may not know how to implement changes in GTM systems. Your system is hooked up to many different tools with downstream and upstream effects that you will need insight into.

This technical gap is at the core of what we're considering at Swantide. We're thinking about what startups need while they grow, collect a lot of data, and experiment with different tools. RevOps leaders need tooling to sort and spot glitches throughout their revenue tech stack.

GTM tech stack best practices

Whether you're creating your GTM tech stack for the first time or working through change management as you add more systems and data, below are ground-level basics.

Maintain a single source of data truth

You need a single source of truth, such as a [data warehouse](). The data warehouse brings together every source of GTM data from...

- Product usage: first-party usage data like actions users are taking in your product
- Customer: all things opportunity management and pipeline
- Enrichment: third-party demographic and firmographic information

...and collates it under one roof. The data team works to unify all that data and apply business logic across the board.

In addition to making data easier to work with, a data warehouse also enables your org to swap out specific tools easily. As long as the new tool is plugged into the data warehouse like the rest of your GTM tools, you can maintain the data warehouse as the source of truth.

The data warehouse is also the place to develop standard metrics definitions to ensure cross-functional alignment on objectives and performance.

Without clear and standardized definitions, your revenue teams will operate on black-box logic. That can create technical debt that some startups struggle to get out from under.

Use the best tools for each job

Salesforce is an excellent tool for early-stage startups because you can start simple and get more sophisticated over time. In the founder-led stage, I recommend that startups at least have a spreadsheet to track data. If you adopt Salesforce in the future, you can add that data later. The biggest mistake I see at this stage is using purpose-built startup tools and later trying to contort them into doing bigger jobs as your company scales.

Eventually, you may have a CRO who wants to move to Salesforce because they need to be able to report metrics to the board, build a predictable sales process, and understand how many reps to hire. If you're using hyper-specific tools or custom functionality, then you're looking at a year-long project and a ton of lost data to get your GTM team onto a singular platform.

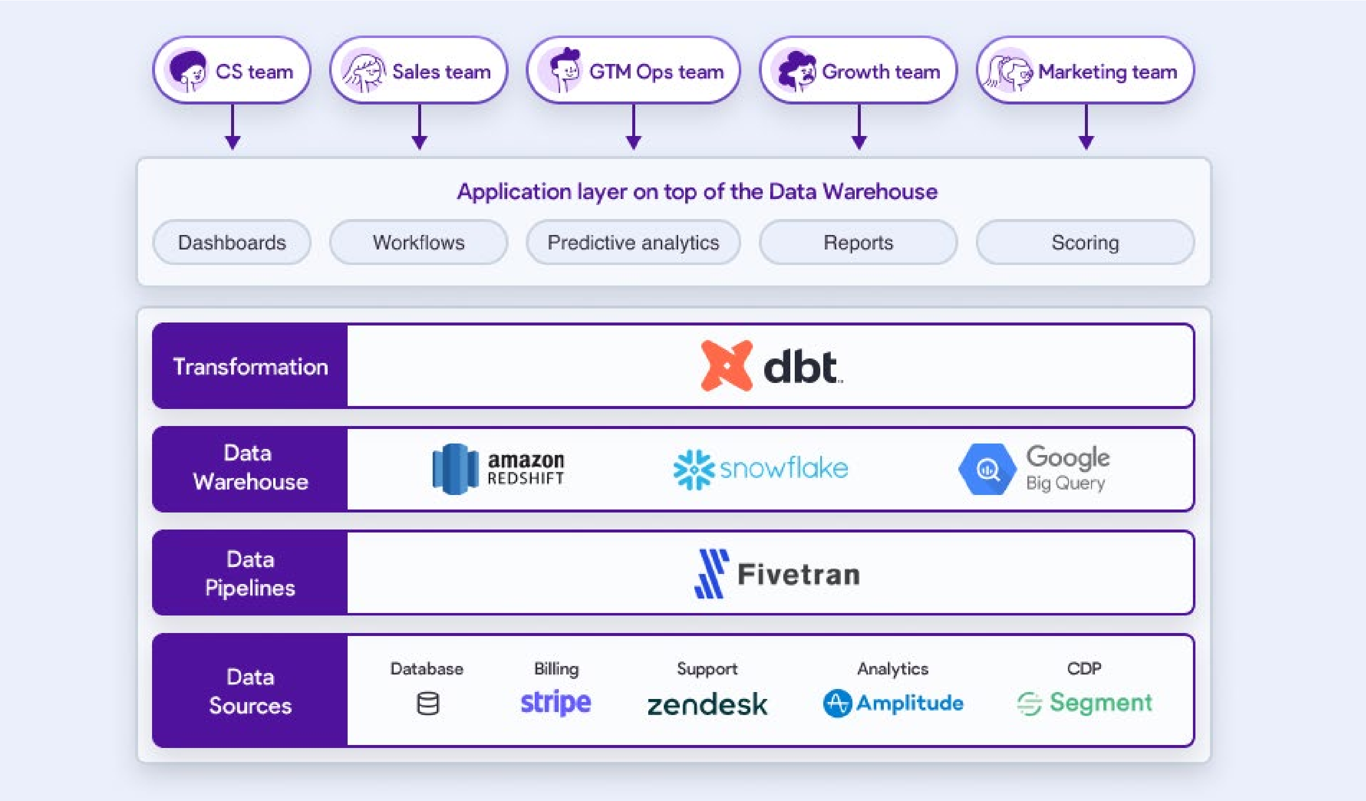
Map integrations

Another thing I've seen, and why we've built integration mapping into Swantide, is a lack of understanding of how fields — such as Salesforce fields — are used in various tools across the GTM team.

For example, let's say you have a field showing opportunities being pulled into HubSpot and your customer success team is also using that field in some of their tools. If someone hides that field from the layout in Salesforce without letting marketing know — they could end up working from inaccurate data for months!

There are a few solutions to get to the bottom of this issue:

- Have a super-human RevOps person who has the whole system living in their head and can spot these issues.
- Pay a consultant to keep track of integrations, probably using a manual system like Google Sheets.



- Implement software where you can view your data model across all tools and make changes in a single place, like Swantide.

The age of GTM data is upon us

The best enterprise sales motions have *always* been data-driven, process-oriented, and strict about the data they've been collecting. It often comes from offline sources, like reps or un-integrated systems.

The product-led growth (PLG) explosion has highlighted the importance of that data and the tools RevOps teams use to bring it online and make it applicable for GTM motions. 🔦

Ultimately, everyone — *no matter what processes they're running* — needs to track GTM data and enforce its organization, storage, and accuracy.

SECTION SIX

MARKETING FOR PLS

How does your GTM motion impact your marketing strategy? Should you invest in community? And, if you already have, how can you leverage your community for revenue growth? Your marketing strategy should be based on three main elements: audience, market, and product.

In this section, you'll learn about successful marketing plays for each motion (bottom-up, top-down, and hybrid), how to create a marketing strategy that supports PLS, and best practices to fuel community-led growth.

CONNECTING COMMUNITY-LED GROWTH AND SALES

Patrick Woods

Co-Founder and CEO at Orbit;
experienced community growth
and customer support expert

Around 2018, my Orbit Co-Founder, CTO Josh Dzielak, and I realized that despite the rising popularity of community as a growth channel, there was a shocking lack of technology that accelerated the community-led growth motion.

Since starting Orbit to foster communities, I've learned a lot about:

- How to help businesses understand and grow communities
- Where communities have the most revenue impact
- What to do and what *not* to do when implementing sales in a community setting

In this article, I will break down community best practices that will help you maximize the impact of community and drive revenue.

Back to basics: What is community?

A community is a group of people coming together to work on a common cause. It helps to categorize communities based on why a community member joins - whether for play, practice, or product.

- Community of play: People that come together for fun. Think of a basketball club, sourdough baking group, or a gaming community.
- Community of practice: People that come together to level up on a skill or discipline. This type of community is usually technology agnostic and more about improving overarching disciplines and skills. This is super common in SaaS.
- Community of product: People that come together to become an expert on a specific tool (eg. Photoshop, audio recording, etc.).

Before discussing how to build community, let's cover some common pitfalls to avoid.

Don't treat community like an audience

Traditionally an audience is a group of recipients. They don't intermingle. The brand sends one-way messages to your inbox, YouTube ads, billboards, etc.

In audiences, one-to-many is the format of communication for a marketer. However, a community is full of many-to-many conversations. No brand "bullhorn" sending the same message to everyone. If there is a brand voice, it's about facilitating conversations between many folks.

Don't treat community members like leads

Where a community-led growth motion can go wrong is assuming every community member is a PQL, MQL, or SQL.

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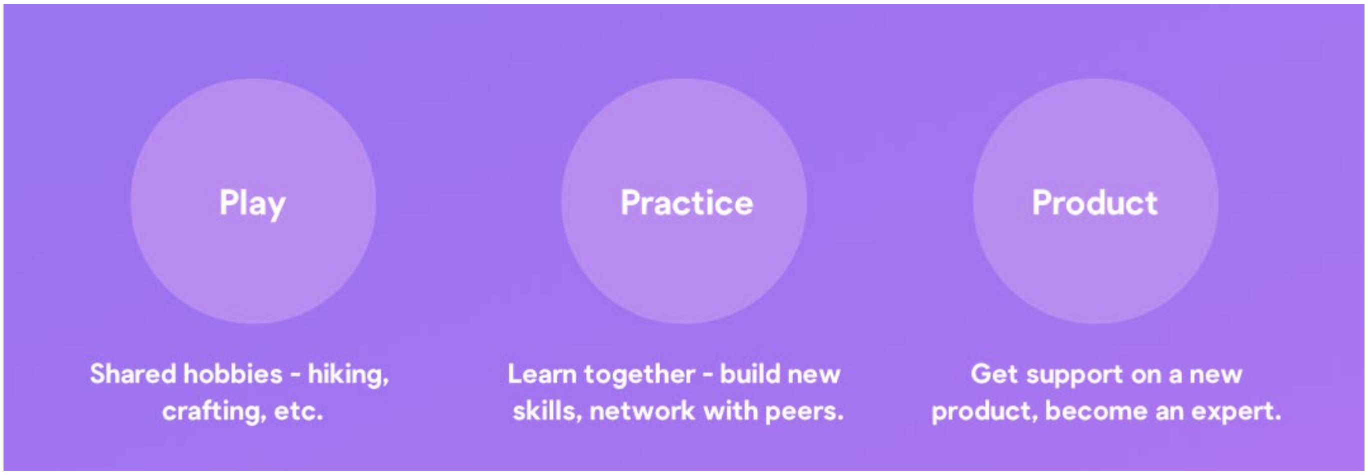


Viewing the community solely as a pool of resources ready to be harvested by sales is short-sighted.

Companies that do community well have programs focused on creating value for their members. That could be education, connections, programming, or events. In addition to creating value, they're also set up to capture value from folks when the time is right.

How to organize your community

Communities often spring from an organic need or purpose and later get formalized. As a result, a common problem with these communities is a lack of clear goals or strategy.

As you move from organic growth to actively managing growth, there are a few questions to ask yourself to start building a strategy:

1. Why are these people here? What are they looking for?
2. Why do we, as a company, want them to be here? What can we offer that answers what they're looking for?

When you understand this, you can identify if you have a gap between your community and the type of community you *want to become*.

Measuring and promoting community success

At Orbit, we developed a model to track community health and help community managers spot areas of improvement. The model has four main components: Gravity, Love, Reach, and Impact.

Gravity

The rate at which member involvement is changing, measured at the community level.

INCREASING GRAVITY

There are two levers for increasing the gravity of a community: love and reach. Tactically, this looks like providing more relevant opportunities for members to get involved and creating more opportunities for members to connect with one another.

To increase love, consider programs that enable:

- Higher commitment activities like attending a workshop
- More frequent activities like answering at least 1 question every week

To increase reach, try tactics that:

- Create more opportunities for member-to-member connections

Love

The measure of an individual member's involvement is based on their presence.

1. Frequency tells us how often the members participate
2. Recency tells us how long it's been since they were last to active

Reach and Impact are practical scoring systems for grouping community members according to their level of involvement, i.e., their love.

Reach

The measure of a member's sphere of influence.

Helpful info that helps us identify reach:

- Who are the most connected members? The least?
- Who can introduce member A to member B?
- What members tend to interact only with a small group?
- What members interact across the whole community?
- What parts of the community are tightly or loosely connected?

Impact

Community magic happens when you see it functioning as a well-oiled machine. Communities may start as an individual on your team driving conversations and engagement (eg. 1:many). Then, the community will evolve and community members drive engagement and create their own initiatives (eg. many:many).

You can ease things along with a few programs of your own, like:

> "Companies that do community well have programs that are focused on creating value for their members."

- Programmatic match programs
- Discussion channels
- Ambassadors
- Regular meetups, and group discussions

Connect the dots between community and revenue

As I mentioned, it's important that the community isn't *only* seen as a pool for sales to dip into. But, at some point it may make sense for sales to engage.

There are two elements that community managers can look for to ensure members are ready for handoffs to sales:

- Explicit - hand raiser actions: This looks like a member reaching out to a community manager and asking for help on things like procurement or signing up for a free trial.

- Implicit - product and community signals: Every community leader should develop signals that show when someone is likely to buy. These signals could be, for example, a developer inviting teammates to the community.

Product and community signals

To identify potential buyers hidden in your community, first define all the activities a person can do:

- Join the community
- Ask a question in the community
- Follow your org on social
- Send your org a Tweet
- Attend a community event
- Participate in peer-matching programs

Weight those signals

For some orgs, people attending a community event is the first touch point in a flow that often leads to expansion. For others, that action may not mean anything from a revenue perspective.

Communities are all different — look at your community members and goals to align on weights for these signals.

How do you figure this out? Go back and look at journeys. You can do this manually by looking at recent sign-ups who began paying or programmatically via software that can identify your top signals.

Defining the rules of sales engagement

Once you understand your signals, it's time to align with sales on the best engagement strategy. Community leaders should be weary of sales coming across as "spammy" to community members.

Here are some strategies I've seen work as I've watched many different community managers use Orbit's platform:

Operationalize outreach

One thing you can do is build smart sales outreach into your culture from an operational standpoint. Set the rules of community and how to engage upfront with the rest of the organization.

For example, one community lead at Apollo GraphQL spends a lot of time onboarding their new go-to-market hires. Part of their new-hire onboarding is community 101 including best practices on reaching out to a community member. For the team at Apollo GraphQL, this meant always looping in someone from the community team first and checking for any notes on the member in Orbit or their CRM before engaging.

Don't waste community context

Another approach we've seen work well is building community context into any sales outreach to community members.

If sales is reaching out, you should have a *ton* of data about that person based on what they've been doing and saying in the community. Don't waste it. When you know a lead's background, you're more empowered to add specific value and ask specific questions that lead to action.

Wait for users to send a signal

Everyone in sales knows timing is *everything*.

In terms of timing, we know *when* to reach out to a community member based on how they engage with certain signals. For example, we track when prospects view Orbit documentation as this is a signal that the prospect might be interested in buying. We alert the sales team to connect the community member to a CSM to help them learn more about the product.

Sales and community must be empowered to work together

For organizations, building a focused, organized community can't just be about creating value for members — it also must tangibly feed the revenue machine.

That's something your Product-Led Sales and community-led growth motions *have* to work together to achieve.

Implement defined signals, robust handoff tools, and sales engagement best practices to empower each element of your GTM team to fulfill their role in the customer journey.

BUILDING A COMMUNITY IN 90 DAYS: BUSINESS IMPACT AND INVESTMENT

Nisha Baxi

Advisor, investor, community expert and early adopter, and Head of Community and Digital Customer Success at Gong

I found myself in the community space somewhat by accident almost 15 years ago.

I started heading up an entrepreneurship Meetup group for fun, eventually growing it from a few thousand to 15,000 people in eight years. Seeing that, someone from Microsoft approached me and offered me a full-time job building and hosting a community for them.

I've since gone on to lead marketing teams and developer communities that drive adoption and foster loyalty at Microsoft, Facebook, Salesforce, and now at Gong as Head of Community and Digital Customer Success.

In this chapter of the playbook, I want to review the core questions I see come up over and over again when it comes to community, including:

- Why focus on community?
- What types of communities are there?
- How do I create a community?

By the end, you should have all the resources you need to determine if a community is right for you and start building your own.

A community is a valuable marketing channel that doesn't necessarily *feel* like a marketing channel. This is what makes it a powerful tool for generating organic engagement, creating loyal customers and product evangelists. With community, you can get a deeper understanding of your audience and build a real-time feedback loop to improve your product.

I often go back to the SPACES model when thinking about and talking to leadership about how the Gong community creates business-wide value:

- Support: Crowd-sourcing answers to save support time
- Product: Improving the product by sharing user feedback
- Acquisition: Creating ambassadors who drive leads, then converting those leads
- Contribution: Building a resource library through user-generated content
- Engagement: Attracting and retaining loyal users
- Success: Sharing user successes to inspire further adoption

Why focus on community?

A well-run community can be a critical pillar of a B2B software go-to-market (GTM) motion because of its impact across marketing, R&D, product, and other business functions.

What types of communities are there?

Broadly speaking, there are two main types of communities.

Top-of-funnel communities

Top-of-funnel communities, which you can also think of as best practice communities, help businesses understand the market, determine product-market fit, and develop resources that help create the category.

This is where Gong's community began, and even today, around 15% of the people who attend our Meetups and participate in our community are not Gong customers.

For example, enough people came to me and said they were looking for a community focused on women in revenue. Many of the people there are customers, but many are people our customers invited who don't use Gong.

> It's really important when you are building a community that you have a seat at the table in a leadership capacity. If you're doing it right, you're impacting marketing, sales, customer success, development, product — everything. The more opportunity you have to sit on a leadership team the more you can drive that cross-functional agenda

MEASURE SUCCESS

OBJECTIVES	GOALS	KPIs
Support	Answer questions	% case deflection
Product	Gather feedback	# of product ideas
Acquisition	Get new leads and customers	# of new customers
Contribution	Build content and collaborate	Quality of user-generated content
Engagement	Foster loyalty and retention	% of active users in program
Success	Drive customer expansion	% churn reduction % customer retention

💡 Who it's for: If you're in the pre-product-market fit stage or building a new category, create a TOFU community.

Bottom-of-funnel communities

Bottom-of-funnel communities are very customer-centric spaces. This is where users who are already active and excited about the product come to engage. They join to connect, learn, and share product best practices with each other.

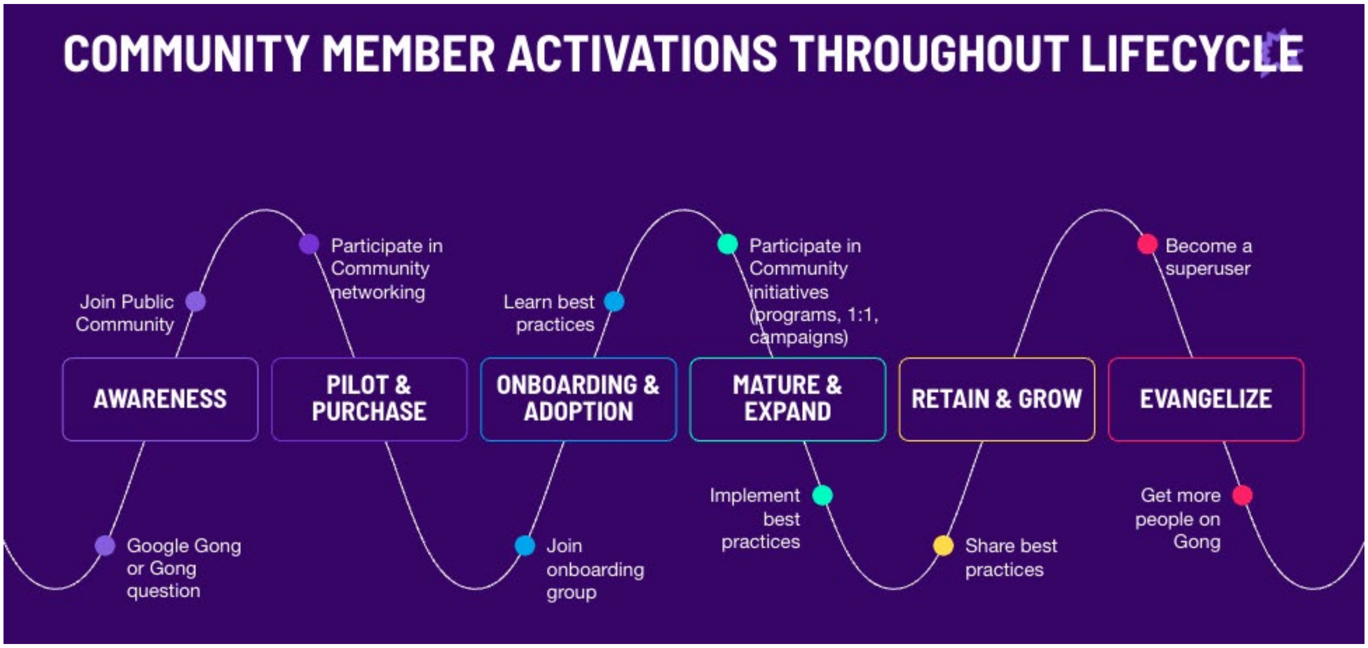
💡 Who it's for: If your goal is to build more advocacy from your existing customers and help them learn from each other, create a BOFU community.

It's important to point out that for each of these community types to meet your goals — which are to drive conversions, retention, and revenue — you need to be thinking about the customer journey: from awareness 💡➡️pre-sales funnel ➡️➡️post-sales funnel.

How you structure your community, its charter, and its goals should all map back to various points on this customer journey.

And the content, programs, goals, and members you go after will depend on whether your community is more in the top-of-funnel or bottom-of-funnel space — which can shift with time, trends, and business objectives.

Community-led growth is similar to the product-led growth (PLG) and Product-Led Sales (PLS) motions in this way. Each is all about figuring out how to provide value for your target audience in a way that aligns with your revenue goals.



Source: Gong

How do I build a community (in 90 days or less)?

The process of building a community from scratch stretches across four main phases:

- Planning and preparation: In months zero through one, you should focus on stakeholder buy-in and finalize your platform and content.
- Implementation: In month two, you're focusing on launching an early adopter program and prepping for the larger rollout.
- Launching: In month three, it's time to go live and announce the community everywhere.
- Measuring: On an ongoing basis, you'll measure community success and reward participation.

Now, let's walk through how each of these phases comes to life more granularly. You'll notice some steps happen concurrently. You'll need to tackle multiple things at once to build a community in just three short months! 🧱

Step 0: Win executive buy-in (day 0)

The most important element of community creation comes before the community even exists. You have to have a strong executive foundation to build upon.

Your C-level has to be invested. They should be fully bought into (and excited about) the impact it will make. This will make a massive difference in the success and acceptance of the community — and give you a powerful team of advisors if you ever need guidance.

Here's how to get buy-in and organize execs around the cause.

Launch a discovery program

You want to think through:

- What is community?
- Why are PLG companies interested in community?
- Does it make sense for us?
- Do we have enough customers for a community to work?
- Do we have the right team to manage it?

At Gong, this phase alone took nine months, and it happened before I was even hired. Something that helped with community acceptance was the fact that Eran Aloni, Gong's EVP of Ecosystem and Business Development, led and championed this discovery effort.

Get ELT feedback

Take your learnings back to the executive leadership team (ELT) for feedback on:

- What is the right user-base — and are we there yet?
- Is this an initiative we're all willing to support? (Community growth goes beyond the marketing and support teams. It's a GTM-wide effort.)
- What will our branding look like?
- What does success look like?

Finalize logistics

- Outline the budget
- Define how teams will collaborate
- Define the role your community will play in your GTM strategy: increasing awareness, scaling revenue, and establishing a competitive differentiator are some of the outcomes you could be considering.

Note: Even though you can leverage community as an acquisition channel, if you go after it with only this framing— you won't be able to provide the experience people are likely to be engaged with.

Set your NSM

What is your community's number one priority — the North Star Metric?

🌟 At Gong, ours is to connect customers and create a space for them to learn from each other. That's what has always guided our content, programs, and the rest of our community initiatives.

Step 1: Lay the foundation (days 1-15)

Build a core pre-launch team

As a community leader, you're going to need to collaborate with other leaders from sales, marketing, support, etc. I reached out to each of these people and asked them to join my "bulldog team," which had regular standup-style meetings up until the launch of the community.

Choose your tools

- Purpose-built community software: I recommend inSided for customer success and Amplitude for analytics.
- Social media management tools: We use Common Room for cross-platform community management.
- Owned platform (optional): Gong has a unique subdomain for the Visioneers community.

Step 2: Interview like mad (days 7-20)

I like to call this the "interviewing spree" period. You'll see why.

If you're building a BOF community, interview existing customers:

- Would they get value from interacting with others who are using the product with the same goals as them?
- Do we even need a community?

If you're building a TOF community interview potential members:

- Is there community-market fit? In other words, are there enough people with the same challenges that want to talk about them?
- Does the category we're in need a community?

Interview potential community board of advisors

Community is still somewhat fringe, and there isn't a playbook for everything you need to know. Luckily, that makes it a tight-knit space where folks are willing to help each other. Think about people you know and people you can get connected to — outside of your company — who are already in the community world and establish a solid board of advisors who can guide your journey.

Step 3: Go on an internal road show (days 1-30)

It's time to take your community plan on the road, show it off across the company, and get buy-in from the people who will help make you successful.

Build a master community deck

- What community is
- Why it's important
- Your function's goals
- Anything else you think will help ramp up internal excitement

Plan and execute your meetings

Look at the org chart and think through what teams you need to work with to be successful — set up meetings from there.

- Ask for 15 min. Meetings with execs
- Ask for 30 min. Meetings with function leaders you want to be on your "bulldog" team
- Plan what you want to ask for — Can you help me moderate? Can you help me with a piece of content?
- Have your elevator pitch ready
- Follow up via email or Slack

Step 4: Develop a detailed plan (day 15)

By now, you have the buy-in, the tools, the people, and the frameworks you need to succeed. It's time to detail how you will bring your plan to fruition.

To get started, go back to the high-level community-planning phases and define every single task that needs to happen in each. That may look something like this:

Planning and preparation

- Define KPIs
- Establish owners for each role/task
- Establish delivery dates for each role/task
- Establish team and hiring needs
- Set up community platform with onboarding flow
- Finalize content and discussion topics

Implementation

- Launch early adopter program
- Plan and execute first event
- Retrieve early feedback
- Make enhancements
- Announce official launch event and begin early recruitment

TIP

Anything you ask people to do, promise them it won't take more than 45 minutes. This is how I was able to get so many people to help me with the community along the way.

Launching

- Plan and execute official launch event
- Orchestrate seed content

Measuring

- Measure against KPIs
- Roll out reward program for participation
- Keep collecting feedback from community

Fill in any blanks

Something I love about community building is that there's always something new to do and to learn. When I was first building community at Gong, I listened to the *In Before The Lock* podcast from community experts Erica Kuhl and Brian Oblinger, which helped me identify anything I hadn't thought about or planned for yet. 🎧

Get organized

You're working cross-functionally now. There is no way to build success or credibility, as you create the community function if you're not organized. I wasn't known as an organized person, but now I am one. Find a way to get it into your DNA.

Step 5: Build the community

Time to execute the creation of the community and everything that must be done to keep it running daily.

You already have your task owners, dates, and a long to-do list, so I'll quickly share how I split my days. This was especially helpful when the community was young, and I needed to ship many elements rapidly.

Plan & prepare
May

Stakeholder buy-in | **Platform & content finalized**

- Develop full launch and recruitment strategy
- Create KPIs
- Establish owners
- Establish delivery dates
- Set up community platform w/ onboarding flow
- Finalize content and discussion topics

Implement
June

Early adopter program | **Announce a launch event**

- Launch early adopter program
- Host event/webinar
- Retrieve early feedback
- Make enhancements and updates
- Announce launch event and begin early recruitment

Launch
July

Launch day

- Launch event
- Orchestrate seed content and discussions
- Community post: "Why we need a community"
- Gong post: How to get the most out of the community

Measure
Always

Track & Reward

- Measure against KPIs
- Roll out rewards for participation
- Survey internal and external community
- Give back to the non-profits

Meetings for 50% of the day

Block half of your day for any meetings you need to have, I usually chose the first half of the day.

Build for 50% of the day

Put 4, 45-minute blocks on your calendar every day to do community deep work — creating community content, posting community updates, setting up analytics, etc.

Step 6: Launch! (days 40-70)

Tap into existing resources

- See if your company has a marketing launch plan template you can use.
- *In Before The Lock* has tools and resources, including a launch guide.
- I piggy-backed on a huge event, Gong's annual Celebrate event. This meant the community got automatically rolled into all the marketing that was already going out about the event.

Soft launch

- Build a group of founding community members from people you've interviewed or shared the community with already.
- Soft launch to that group. I did this about two weeks before the official launch.
- Gather feedback.

Hard launch

- Launch your community to the public with a communications plan that gets it into as many internal and outbound channels as possible.
- Have your seed content ready to go and get the discussions started.

TIP

Pre-launch, I sourced three pieces of seed content developed for every section, ensured it aligned with target personas, and tried to make it as actionable as possible.

Step 7: Measure, show, and celebrate success (days 60-72)

Measure and show success (ongoing)

- Build dashboards to measure against the KPIs you've already defined with leadership. I use Salesforce.
- Publicize the community's success with "by the numbers" articles, Slack shoutouts, or your preferred internal comms channel. This is important for two reasons. One: you have to keep proving value to stakeholders. Two: companies who believe in their communities have better ones than those who don't prioritize it.

Celebrate success

- *Excessively* thank everyone who helps and has helped you with the community, as publicly as possible — newsletter, Slack, etc.
- Celebrate yourself! Plan something to celebrate your success that you can look forward to after launch day.

What will you do in your next 90 days?

Results follow intention.

Develop a clear and specific intention around your community and what it will achieve. Follow that up with confidence, commitment, and a plan, and I have no doubt you, too, will be able to bring your community to life over the next few months.

HOW YOUR GTM MOTION INFLUENCES MARKETING

Emily Kramer

Co-Founder and Fund Manager at MKT1

From marketing leadership roles at Asana and Carta, to working with over 50 startups over the last couple years a Co-Founder of advisingfirm turned venture fund MKT1, I've seen the challenges many SaaS marketing orgs face. One of the biggest challenges I encounter is the foundational work required to align your marketing strategy to your GTM motion: top-down, bottom-up, or hybrid.

But, once you understand the essential elements of each motion and your target audience, how you market your product becomes much easier.

So, for this article, I'm going to dive into the following:

- The three core drivers behind every effective marketing strategy
- How most common GTM motions shape marketing and sales strategies
- How your GTM motion should also impact your marketing org chart
- Whether product-led is right for you — and how to manage the shift if it is
- Hiring tips for a hybrid GTM motion

Three core drivers of marketing strategy

I often see people join a new company and try to implement the marketing strategy from their previous company or tactics straight from some guide they've read online.

That it isn't going to work. You cannot plug and play your marketing strategy from one company to another, even if you have the same business model — *especially* if you don't.

Instead, your marketing strategy needs to be driven by these three elements:

1. Audience, market, and product
   You need to understand your audience and ecosystem well to market your product. Who's your audience? What market are you playing in? Who are the competitors? What is your product? What problem does it solve? The answers to these questions will be specific to your company, informing a marketing strategy that's unique to you.

2. GTM motion and business model
   Your go-to-market (GTM) motion impacts your marketing strategy. If you are a top-down sales business where sales is the only one selling the product, your marketing strategy will be different from a self-serve/PLG product selling directly to end-users.

3. Marketing advantages
   "Marketing advantages" are the built-in dynamics of your business that when accelerated will help you grow much faster. These advantages include network effects, your ability to create a category, or having a clear wedge-in (meaning going after a small vertical first and expanding from there).

Together, the contents of each of these buckets will dramatically impact and should inform your final marketing strategy.

How your GTM motion impacts your marketing strategy

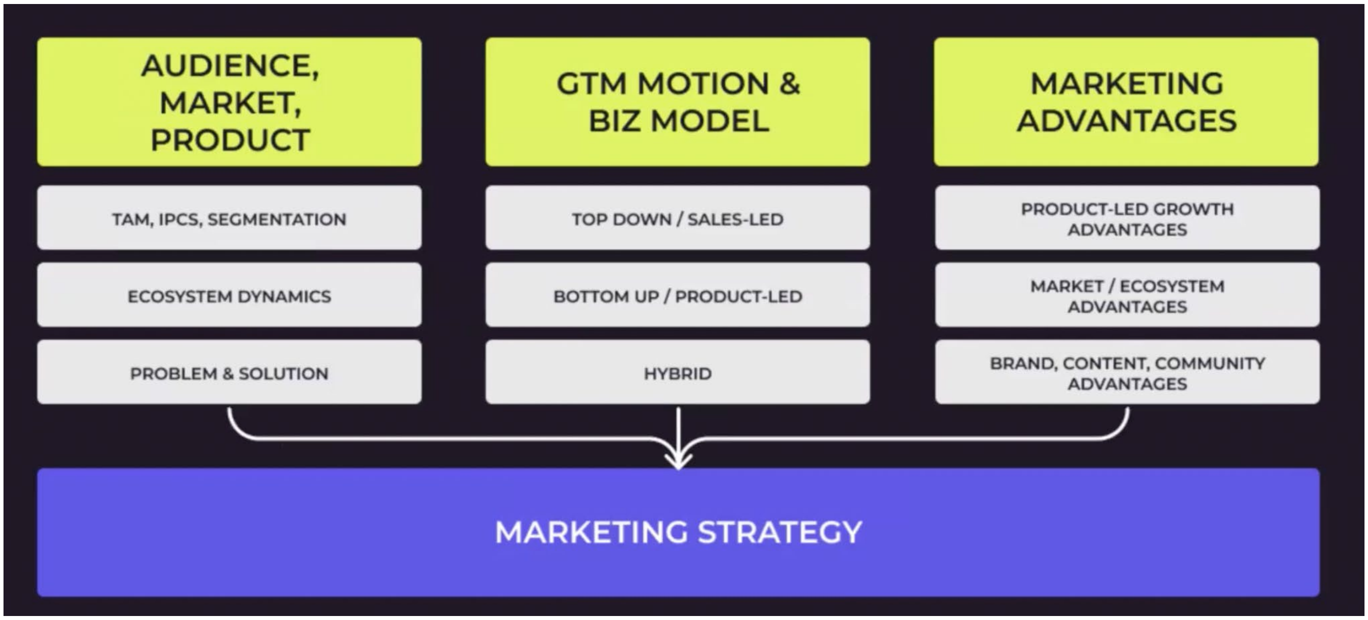
Let's talk about the most popular go-to-market motions and how each influences marketing and sales, from your marketing strategy to plans, channels, tactics, experiments, and beyond.

Product-led growth (PLG) motion

A pure-play PLG company is typically defined as not having a sales team. Customers buy on their own through the product or the marketing website.

Let's explore what this motion means for the various elements of sales and marketing:

- GTM team structure: With a PLG motion, your GTM organization is typically marketing-heavy (and may not have a sales team at all).
- Plan(s): Plans often feature a free tier or trial and a paid plan.
- Call-to-action(s): CTAs should invite visitors to try for themselves. CTAs like "sign-up" and "get started," are common.
- Channels: You're focused on inbound channels that drive traffic to your website, often casting a wider net.
- Marketing KPIs: Your goals are centered around web traffic, sign-ups, and PQLs to measure performance..
- Lead scoring: PLG lead scoring takes into accountt product usage, firmographic, and marketing behavior data.



Source: MKT1

- Average deal size: Not always, but often PLG organizations will have lower-cost products and, therefore, smaller deal sizes. When you have a lower-cost product, it makes sense to offer a free version to attract customers since you don't want to spend as much on acquisition.
- Time to upgrade/close: You may have a faster time to upgrade or close because people can complete purchases independently as soon as they're ready. But that's not always the case. It can take a long time before they feel the need to go from free to paid.

Product-Led Sales motion (hybrid)

Nestled right in the middle is the Product-Led Sales motion, a hybrid that includes elements of both product-led and sales-led motions. The PLS motion usually includes a combination approach where folks can purchase and upgrade directly through the product — but there is also a layer of sales (or sales-assist) engaging with high-potential accounts or using that data to go outbound within an account.

Here's how a PLS motion impacts marketing strategy:

- GTM team structure: In a PLS GTM team, sales and marketing work together — which one is larger will depend on your product and goals.
- Plan(s): Companies running a PLS GTM motion often offer free trials/tiers through a self-serve motion and paid plans through a sales motion.
- Call-to-action(s): with a PLS motion, you'll have 2 main CTAs,sign-up and request a demo, depending on who the prospect is and what page of your website their on..
- Channels: Outbound, inbound, and a combo of the two are all used by PLS-focused GTM teams. Sales teams may use channels as a key signal for which leads to engage with vs. who to send trhough the self-serve flow
- Marketing KPIs: In a PLS motion, getting the right analytics set up is essential, since KPIs run the gamut in PLS orgs — sign-ups, PQLs, MQLs, and pipeline.You need to look atfull-funnel metrics, product engagement, and website activity in a product-led organization.
- Lead scoring: Similar to PLG, lead scoring in PLS orgs relies heavily on combining product usage data with other intent signals.
- Average deal size: The average deal size varies quite a bit, with sales teams focusing on larger deals that come inbound. Smaller deals often get left in the self-serve funnel. Caveat: not all small deals stay small, expansion is a key component of a PLS motion. Create pathways for smaller deals to find their way back into sales hands if there is a possible expansion or upsell.
- Time to upgrade/close: The time to close or upgrade will depend on your offering and journeys.

Product-Led Sales is more complex than the other GTM buckets. Businesses moving to this hybrid option may be wondering how they will support both a sales team and in-product growth.

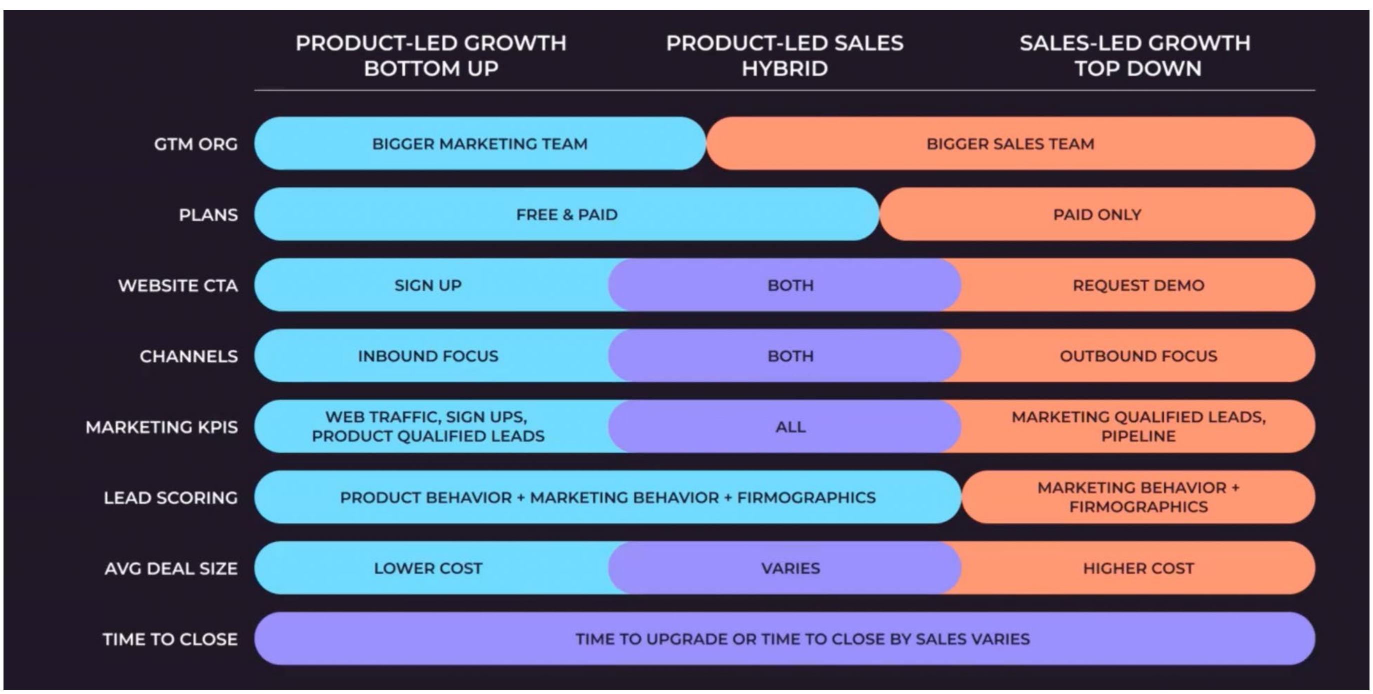
It's a more extensive prioritization set but it also means more options to buy. Not everyone will want to buy through a sales team — and not everyone will want to buy through the product. PLS gives you more options at the end of the funnel, which makes the hard work worth it.

Sales-led growth motion (pure top-down)

On the other end of the spectrum from product-led is the fully sales-led motion, where every customer typically has to engage with sales to buy the product.

Here's what sales-led growth means for core sales and marketing strategy elements:

- GTM team structure: A sales-led GTM org is, naturally, heavy on sales.
- Plan(s): Sales-led businesses only offer a paid version of their product.
- Call-to-action(s): With a sales-led motion, don't set an expectation that folks can start using the product right away. "Request demo" and "talk to sales" are more accurate.
- Channels: Sales-led organizations typically already know what companies and users they want, so focusing on outbound-specific channels makes the most sense.
- Marketing KPIs: Sales-led GTM teams are looking at marketing-qualified leads and pipeline to measure performance.
- Lead scoring: You're usually scoring leads to qualify them in a top-down sales organization based on firmographics, demographics, marketing behavior, and interaction with your website, email, etc.
- Average deal size: It's typical to see top-down sales when you have a high-cost product, so these orgs often have a larger average deal size.



Source: MKT1

- Time to upgrade/close: You know the drill — the time to upgrade and close can change based on *many* factors—however, the more expensive the product, the more high-touch and long the sales cycle tends to be.

The GTM motions' influence on the marketing org chart

Your GTM motion will also influence not necessarily *who* is in your org chart but what their primary focus is.

In product-led, sales-led, and hybrid Product-Led Sales environments, you'll still have buckets like acquisition, lifecycle, product, and content marketing — but the jobs they do will look a bit different.

I'm going to walk you through the marketing roles that I think the GTM motion impacts the most:

Acquisition marketing

Whether you call this role acquisition, growth marketing, or demand-gen, the primary difference will be whether they focus on inbound, outbound, or a mix of both.

Lifecycle marketing

Lifecycle marketing owns everything past the qualified lead stage, nurturing leads toward a sale or upgrade.

In a PLG organization, they will work a lot more with the product team because nurturing takes place in the product. In a sales-led organization, lifecycle marketing's work will enable sales and customer support to nurture personal relationships. And in the hybrid space, it's a mix of both.

Product marketing

Product marketing should *always* involve positioning, messaging, and audience/competitive research.

At a sales-driven organization, product marketing will work closely with sales and customer success to enable them. But in a self-serve or hybrid organization, product marketing focuses more on enabling prospects directly through self-serve flows, which includesoptimizingthe website for conversion and createingcontent that drives the self-serve motion.

Content marketing

Content marketing will also vary because the channels are different depending on your GTM motion.

In the sales-led motion, the job is making demand-gen content that powers the outbound engine. The more product-led you go, the more it becomes about creating content that will drive inbound organic search traffic and be shareable on social media.

Head of marketing

I've headed up marketing at organizations with every one of these GTM motions, and the experience has always been quite different.

I've found that, generally, in a self-serve or hybrid organization, the marketing leader is expected to develop a full-funnel strategy where marketing is working to drive conversion and growth throughout the funnel. Marketing is also building the brand and driving customer experience.

In a top-down sales organization, marketing is more than the service organization to sales that primarily hands qualified leads over to them. There is much more focus on top-of-funnel strategy.

Should I adopt a product-led approach?

There are a few primary questions all businesses should ask before considering a product-led motion:

- ? Is your audience regularly seeking a way to get the product without talking to someone?
- ? Do they tend to understand the problem and your solution pretty well?
- ? Are they often ready to purchase or get into the product as soon as you talk to them?
- ? Do you have salespeople doing the work your website and your product could do?

If yes, you could use a product-led motion that relies on your product/website and enables customers to dive into the product without engaging sales too heavily.

ROLE / FUNCTION	PRODUCT-LED GROWTH / BOTTOM UP	PRODUCT-LED SALES / HYBRID	SALES-LED GROWTH / TOP DOWN
ACQUISITION	INBOUND-FOCUSED	MIX OF INBOUND & OUTBOUND	OUTBOUND-FOCUSED
LIFECYLE MARKETING	IN-PRODUCT & EMAIL TO DRIVE UPGRADES	PRIMARILY FOCUSED ON IN-PRODUCT & EMAIL TO DRIVE UPGRADES	ENABLES SALES & CS TO DRIVE UPGRADES
PRODUCT MARKETING	POSITIONING & MESSAGING ACROSS CHANNELS, INCLUDING WEB & IN-PRODUCT	POSITIONING & MESSAGING ACROSS CHANNELS	SALES & CS ENABLEMENT FOCUSED
CONTENT MARKETING	BLOG & WEB CONTENT DISTRIBUTED VIA SOCIAL & SEO	MIX OF CONTENT TYPES & DISTRIBUTION TACTICS	DEMAND GEN CONTENT FOCUSED
HEAD OF MARKETING	SETS FULL-FUNNEL MARKETING STRATEGY	SETS FULL-FUNNEL MARKETING STRATEGY	PLANS A MOSTLY TOP OF FUNNEL MARKETING STRATEGY

Source: MKT1

Three steps to managing the shift from sales-led ➡️ hybrid

Sometimes in marketing, a founder comes to us and says, “we should hire a sales team” or, more popular right now, “we should try a freemium model.”

No matter the situation, as a marketer, that can be overwhelming. So I’ll tell you how I’d handle the shift if I were going from top-down sales to a hybrid motion.

1. Get to the why

The best place to start is to figure out the why behind the shift.

It doesn’t matter if you have little influence over the final decision. Understanding what’s at the root of the change is still helpful. Sometimes, the desire to go more product-led is based on deep thought and reasoning. Other times, it’s just about doing what many other businesses are doing. It’s helpful to understand where this is coming from when you go to build out a plan.

2. Take “baby steps”

Here’s a secret: You don’t need a full self-serve flow built out to introduce some product-led elements — or find out if product-led will work for your business.

One baby step is to test the product-led motion using chat on your website. Put in a chat tool or bot and set up something ready to buy. This enables people to engage in the chat and possibly make a purchase.

Other ways to get closer to product-led:

- Test an “I’m ready to buy” button that routes folks to a shortened sales process, like an on-the-spot sales call.
- Introduce a side-car app like Hubspot’s website grader. It’s adjacent to the core product but gives a prospect an in-product-like experience.
- Launch an interactive demo that gives the experience of a “trial” without the work of making your product self-serve.

Baby steps like these work quite well as either a proof of concept or a first, achievable step.

3. Document and prioritize tasks

Anytime you’re launching a new motion, you’re going to need to update your product, website, marketing messaging, content, onboarding, and even sales routing in your marketing automation tools — I don’t think people realize the amount of operational work it takes to get this step *alone* right.

So another valuable thing to do is to lay out every single flow that will need to be updated in some way to pull off a new motion — basically, everything that marketing touches.

As part of this step, I recommend developing a diagram of how your entire funnel works. Then, update it to describe how your new motion will fit into the scheme of things so that it's crystal clear who will handle what and which new flows will need to be built on the ops side.

Connect the dots between motion and marketing

Your go-to-market motion impacts many functional marketing areas, from something as small as the CTAs you put on the website to whom you hire to lead marketing. When defining or refining your marketing strategy, keep in mind your GTM motion, audience and market, and your marketing advantages to grow much faster than you would by following a playbook.

SECTION SEVEN

PLAYBOOKS IN ACTION: CASE STUDIES

How are the most successful companies implementing PLS? This section covers three different playbooks that outline how to balance automation vs. personalization, scaling customer success, and finding enterprise opportunities. You'll find step-by-step guidance to replicate the success of OpenPhone, Clockwise, and Tome using tools like Pocus.

TOME: AUTOMATION WITHOUT LOSING THE HUMAN TOUCH

Kian Kolahdouzan

Customer Success Lead at Tome

Use product signals to automate outreach and improve product adoption with new users.

Tome's early-stage growth strategy

Tome is a new storytelling format that empowers anyone to build and share compelling narratives with content: text, images, video, 3D renderings, prototypes, live web content, embeds, and more.

In 2022, the company transitioned from a waitlist model with 1:1 onboardings to a self-serve Product-Led Sales (PLS) approach where new users can sign-up for free and get started on their own.

Despite optimizing our onboarding process, we're still refining how and where to engage with our growing user sign-up base.

So, customer success spends most of the time analyzing the user journey to maximize activation and identify power users. Part of our growth plan is to use our Product-Led Sales motion to create product evangelists — power users who create tons of Tomes and share them with others.

Who are these users?

VIPs: A user with a high level of influence. To spot these users early and give them hands-on support in learning the ropes to create and share content via Tome.

ICPs: In addition to VIPs, we have several other ideal customer profiles (ICPs), which are mainly related to their work roles:

- Founders in fundraising mode
- Designers
- Product managers
- Sales and customer success

The challenge? Recognizing VIPs and ICPs in a non-manual way

In addition to zeroing in on the level of influence and job functions when prioritizing personalized outreach, there are a few signals that we also look at to determine whom to focus on:

- Number of days on the product + activity in the product
- Number of users they've added to their workspace
- Amount of feedback provided about new features they would love to see

Category	Definition	Example Signals
Customer Fit	How closely does the user/account match your ICP	• Industry • Geography • Company Size • User Role
Product Usage	How does the user/account interact with your product	• DAU • Free: Paid account • Invites sent • Feature usage
Buying Intent	Did the user/account take an action to indicate they are ready to buy	• Pricing page visits • Contacted sales • Adding more seats • Hit plan limits

Identifying signals through all the noise.

Something I think about a lot as inbound sign-ups grow is how to use automation to scale customer support.

One of my main concerns was that as Tome scaled its customer success efforts, we would lose that human touch that PLS motions often need for onboarding success. But, we've been able to offer that human touch by analyzing product usage data to surface high-potential users that need extra support.

Tome uses Pocus to identify ICPs and act on Signals

Our go-to-market team uses Pocus to enrich user profiles with product usage data to provide insight into the highest-value opportunities within our pool of users.

Here's how.

Want to run this playbook?

What You'll Need

- Self-serve product with a healthy user sign-up volume (enough you can learn from)
- Defined ideal customer profiles
- Defined product usage signals that your team cares about
- Pocus' Product-Led Sales platform for aggregating insights about customers

#1 Create cohorts of customers

The go-to-market team at Tome uses Lists in Pocus to create user cohorts by different product signals, such as the number of Tomes created, the overall time in the product, and so on.

#2 Create playbooks to surface high-priority opportunities

We've set up playbooks to drive different outreach motions. For example, we set up one of our playbooks to focus on new users in their first 30 days. Tomes created is a key signal for us, so we've set up triggers to surface users who are "not delighted" — those that have created less than two. I reach out to these users differently than the delighted segment.

#3 Drive behavior-based messaging

Using Pocus Playbooks to segment users, we can create personalized email sequences in Customer.io that help drive more usage based on signals and behavior.

Tools that help us with customer outreach:

- Intercom for on-site customer support messaging
- Customer.io to send out product announcements and usage-based campaigns
- SendGrid for product email notifications (mainly used by engineering teams)

#4 Experiment with new cohorts

We monitor key signals (time on the product, Tomes created, users added, feedback provided, etc.) and whether they're growing or shrinking. Whichever way the signal is moving, knowing this info about users triggers more helpful, targeted conversations.

To make these conversations more relevant and personalized, we slice up experimental user cohorts and enrich their data in Clearbit to have a complete picture of which personas are more (or less) successful.

The Results

Revenue efficiency: Increasing visibility into where and how to engage with users allows the team to focus on helping high-potential opportunities get value from the product. Instead of reaching out to every new user with general content, we rely on product-usage data to identify the right moments for targeted outreach.

That's a major unlock for scaling CS without losing that connection or personality.

Time saved: Specifically — engineering time. Before having a centralized platform for customer and product-usage data, I would have to submit a ticket to engineering several times a week. We now have access to most of the usage data we need to inform our success strategy.

OPENPHONE: SCALING CUSTOMER SUCCESS WITH GROW, DEFEND, AND MAINTAIN FRAMEWORK

Giancarlo Gialle

Head of Sales and Success at OpenPhone

Not your 90s VOIP

Businesses need to use the phone to get things done, but they no longer want the antiquated systems of the 90s.

OpenPhone provides users a business line and related phone services with a simple app, making it easy to keep their business calls separate while still using their own devices.

We've seen massive growth over the past two years. Two years, two rounds of funding totaling $56M later, and we're trusted by companies like GetAround, Deloitte, Bungalow Sonder, Y Combinator, Ramp, and more.

Thanks to the PLG model, we see millions of calls made by new users each month.

The challenges of growing and maintaining your self-serve user-base

We've evolved a ton since our inception. What was first a simple iPhone app is now available on Android and desktop and has integrations to popular tools (Salesforce, Hubspot, Slack, Zapier) and advanced team features like shared address books, call recordings, analytics, and more.

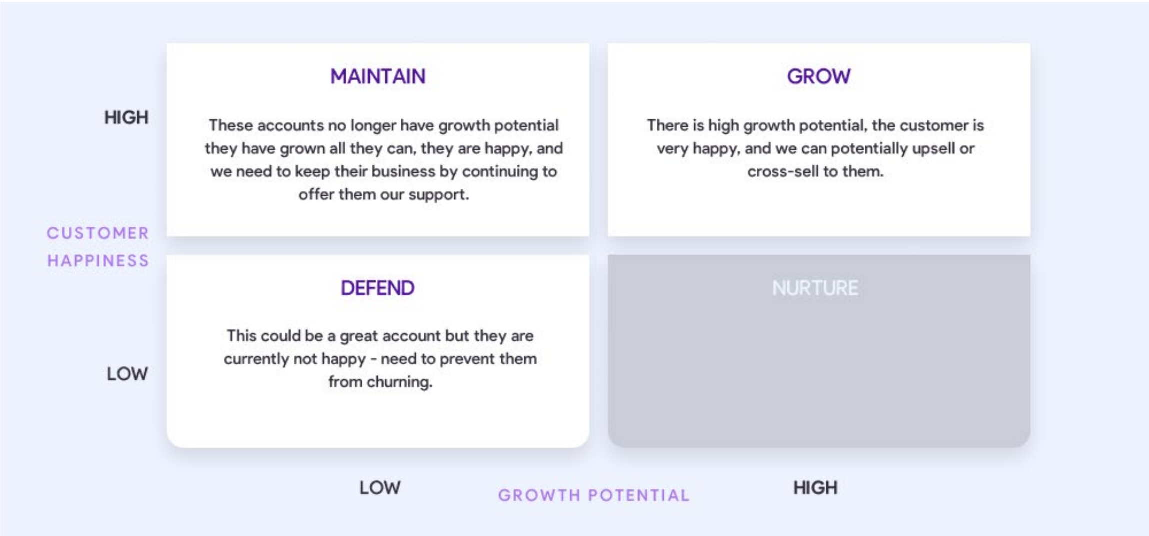
Alongside the product evolution, we've matured our go-to-market function. I started as Head of Sales and Success in February 2022 to help support this shift.

Now that we have 20K+ customers and reliably generate new business through our free trial motion, we came up against a few unique challenges with our self-serve and managed book of business:

1. How to identify what free trial users the sales team should pursue?
2. How to identify opportunities for growth within existing accounts?
3. What accounts should the team focus on defending vs. maintaining?

We needed a way to use product usage signals to inform both the sales and customer success teams' playbooks. The problem? Both teams needed help getting access to the correct data and insights for their various playbooks.

Read on for a step-by-step guide on how our customer success team uses Pocus to run an offensive strategy to keep customers happy, find opportunities to expand, and retain high-value accounts.



Use product signals to inform customer success playbooks

The sales team already used Pocus to uncover high-potential free trial opportunities, so it was a natural extension to surface opportunities for the customer success team. Like the new business playbook, we outlined goals for the customer success team and which playbooks would help them achieve those goals. Then it was all about operationalizing those playbooks with product and customer data in one easy-to-use interface.

Want to try this playbook?

What you'll need:

- Product data about how customers are using the product
- Salesforce or other CRM for customer data
- Stripe or other tools for billing data
- Enrichment providers like Clearbit
- Outreach or another engagement tool for emailing customers

#1 The team identified 3 categories of accounts they wanted to target

The customer success playbook is about being proactive about our existing user-base. The best way to think about this cohort was by looking at their growth potential and current happiness with the product.

The 3 categories we cared most about were:

Grow: There is high growth potential, the customer is very happy, and we can potentially upsell or cross-sell to them.

Defend: This could be a great account but they are currently not happy - need to prevent them from churning.

Maintain: These accounts no longer have growth potential, they have grown all they can, they are happy, and we need to keep their business by continuing to offer them our support.

The bonus Nurture category is not something the OpenPhone GTM team is focused on at this time.

#2 Outline goals for each playbook

Define a goal for each playbook so you can track progress. For example, in the Defend playbook your goal is to prevent that account from churning. What this would look like in your data is something like “Account = Inactive.”

TIP

In addition to product signals, look at firmographic signals that tell you they fit other use cases you could potentially upsell or cross-sell. In our case, we use Clearbit data to flag if a customer has Salesforce so we can upsell that feature.

#3 Define signals that qualify customers for Grow, Defend, and Maintain playbooks

Choose signals that qualify customers for each playbook.

For Grow identify signals which indicate whether the account has potential upside opportunity:

- Ratio of # of employees in the account to # of users on your product
- Spend increases in the last week or month
- User growth in the last week or month
- New feature usage
- Recently hit a paywall
- High NPS

For Defend you want to define leading and lagging signals that indicate a potential for churn:

- Low NPS
- Reduction in key metrics like users (seat-based) or dollars spent (if you are usage-based)
- Lack of activity on key features
- Canceled plan at a future date (i.e. did not renew for next billing cycle)
- Stripe failure (billing failed or they removed credit card)

For Maintain identify signals to ensure usage remains good and customers remain happy:

- High NPS
- Full expansion potential (seat usage)
- Using features a

#4 Build out actions your team should take in each playbook

Each of these CSM playbooks requires a nuanced human touch point, where the CSM comes into Pocus, reviews their prioritized opportunities in the Inbox, and takes the appropriate actions.

#5 Operationalize and measure results with your team

Once playbooks are set up in Pocus, CSMs can onboard onto the Inbox. The Pocus Inbox is where the CSM team checks in every morning, and it has their highest priority customers organized by playbook ready for them to take action.

This has simplified the CSM workflow from reconciling data across multiple tools (data warehouse, CRM, Zendesk, Stripe, etc.) to one source of truth with proactive alerts on where to focus.

The Results

Reduce time wasted looking for data. CSMs now have access to proactive insights about their customers instead of digging across multiple sources to reconcile what is happening within a single account.

Run offense instead of defense. With insights readily available to the CSM team, we can run an offensive playbook. By proactively monitoring for specific signals, the team can get in front of customers with the right message instead of reactively engaging after something has already happened.

FINDING ENTERPRISE OPPORTUNITIES WITH PRODUCT-LED SALES

Melissa Ross

Head of Product-Led Sales at Clockwise

Pinpointing the right accounts for conversion

Clockwise has taken over corporate calendars everywhere. It's a favorite among productivity hackers and professionals who want to simplify their day. Our freemium business model created a massively loyal fanbase within an impressive list of companies.

That focus on creating a happy and loyal end-user-base has paid off, but deployments had gotten so large that these accounts would fail to convert from self-serve to paid plans.

We had a sense that a self-serve revenue model would work. Still, because we had been so focused on growing within companies before monetizing, there were substantial deployments that we knew wouldn't just self-serve and transact. They would need a lot of hand-holding, and a proper deal cycle, to support all of the organic usage.

Our Customer Success team was overwhelmed with hand raisers asking questions about paid plans, upgrades, and pricing. It was time to adopt a new sales strategy to capture this demand.

We knew that if we could identify the best opportunities from product usage, we'd be able to pinpoint the accounts ready to convert to paid plans. The challenge was the sheer volume of data the team would have to analyze between what existed in our data warehouse, the CRM, and various analytics tools like Metabase. Our sales team didn't have an easy or efficient way to synthesize the data and take quick action.

Standing up Product-Led Sales at Clockwise

We implemented a Product-Led Sales approach that empowered our sales team to engage high-intent end-users within large accounts to upgrade their plans.

We took a phased approach to operationalize Product-Led Sales for the go-to-market team. The goal was to learn from what was already working in our existing PLG motion and complement that with a sales approach to help us land those larger enterprise accounts.

Want to try this playbook?

What you'll need

- CRM (like Salesforce or Hubspot) with firmographic customer data
- Data warehouse (like Snowflake or BigQuery) where you store product usage data
- A Product-Led Sales platform like Pocus (that can drive both insights and action)
- A sales email platform (like Outreach or Salesloft)

#1 Understand and segment users through manual analysis

As a precursor to defining PQLs and operationalizing everything in tooling, we first wanted to understand our existing users deeply. So we set out to answer three questions:

- Who are the primary user personas
- What type of companies sign-up
- What are the use cases for Clockwise across departments

How did we execute this research? Sales shadowed customer success calls and spent time with them to dive deep into each customer account.

Then we used this knowledge to segment our customers and map them to personas. We segmented our GTM team by target market (SMB, Mid-Market, and Enterprise) and, within those segments, prioritized managers and above in Engineering, HR, Operations, and IT departments.

#2 Prioritize accounts as a precursor to formal PQLs

We then launched into an account prioritization exercise, which was a precursor to our official PQLs of today.

The prioritization work looked at different signals for each account:

- How many users were active in each account
- How many conversations with customer success
- How much Focus Time Clockwise had created for the company

It was a mix of product data with internal context. Because Clockwise is a product that works on your behalf, we weren't focused on logins or frequency of usage. We had to get more granular into specific features that signaled a truly activated user.

#3 Clean up and unify customer and product data

Then it was time for data clean-up. We migrated to Snowflake as our data warehouse and Salesforce as our CRM. Then we connected those two sources to Pocus to create a unified view of customer data.

Before starting with Pocus, sales spent valuable time deep in manual data collection from various sources to find the best sales opportunities in their existing user-base.

This didn't just leave key info out of the lead picture. It was also becoming a reactive model for sourcing pipeline — digging through data to find leads instead of being alerted of potential opportunities.

With Pocus, we've been able to seamlessly combine product and customer data into a single pane of glass view, showing sales and the rest of the GTM team granular insights into why accounts and users are good opportunities for outreach — so they can reach out at the right time, with the right message.

#4 Set up PQL experiments and begin testing

From there, it was time to start experimenting with PQLs. We built PQL scores in Pocus (without engineering support). What helped build trust in these models was the ability to drill into the 'why' behind the scores.

On the surface, the raw number of users can look very attractive, but you need to layer on the depth of usage on top of that. In Clockwise's case, hundreds of active users don't necessarily mean conversions. Sales needs to know what features they're using and how they're using them, not just a black box score.

#5 Drive sales behavior through Slack Alerts

With Pocus, PQLs are coming to reps directly to their Slack every morning instead of having to scour a CRM (or go in cold). Reps can see a roll-up of their top priorities, take action directly from Slack, or jump into Pocus to research further.

This proactive motion helps the team qualify for these opportunities much faster.

Sales reps can see important info for each of their leads:

- Where are they in their Clockwise journey
- What is their role within their company
- Key insights into product usage data

It is much easier to be hand-fed high-potential leads to reach out to than to dig for the data ourselves in various tools. We would have gotten that info reactively before, and now that info comes to us.

The Outcomes

Generate new lead types: When sales needs more pipeline, they turn to Pocus to identify a new hypothesis for what a lead could look like and then experiment/operationalize it.

Research quickly: Pocus provides a complete snapshot of each account and its usage, helping reps onboard into new accounts quickly and without much manual work.

Proactive lead management: Alerts! Alerts! Alerts! PQLs are coming to reps instead of them having to scout a CRM (or go in cold).