Sales Operations Excellence Maturity Stages

ATRIUM
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	Founder Selling	Small Sales Team	Beginnings of Scaling	Scale Out
	Org Size: 1	Org Size: 2-5	Org Size: 5-10	Org Size: 10-30+
	Sales Org Composition / Single founder seller **Management /** NA **Sales Operations /** NA **Sales Org Characteristics /** Figuring out the sales motion. Single seller, usually founder.	**Sales Org Composition /** 1-3 AEs, 1-2 SDRs, founder seller / manager **Management /** Founder **Sales Operations /** NA **Sales Org Characteristics /** AEs and SDRs adopting founder-proved sales motion and authenticating it can be replicated.	**Sales Org Composition /** 3-5 AEs, 2-5 SDRs, 1-2 CS, 1 Management **Management /** Early sales manager, "sales leader lite" **Sales Operations /** Single dedicated sales operations resource. **Sales Org Characteristics /** Small AE & SDR teams, either managed by single resource, or two resources. AM function beginnings. Beginning of sales motion segmentation as needed.	**Sales Org Composition /** 10+ AEs, 10+ SDRs, 3-5 CS, 2-3 management, 1 leadership **Management /** Professionalized management, with multiple layers of sales management, dedicated per discipline (SDR vs. AE). **Sales Operations /** Additional dedicated resource or two (2-3 total), depending on complexity of sales motion and stack. **Sales Org Characteristics /** Team of teams scaling out and cementing smooth handoffs and rules of engagement.
CRM & Metrics				
CRM / Admin	Basic CRM implemented for account, deal, and contact tracking. Can be Google Sheet to start, or "CRM lite" (Hubspot, Pipedrive, etc.), or, with prior experience, SFDC. Enough data capture to be able to do basic metrics, bookings accounting, and go back across dead deals to re-engage.	Start thinking about transition to "real" CRM if not there already. Admin work can be done by in-house admin, but start thinking about setting the org up for success later with legit renewal process, account type tagging, opp reporting, etc. Start activity capture into CRM for better reporting. Consulting CRM admin & reporting assistance best at this stage.	Organization is on business-grade CRM, and administration is something that is doable, with limits, in house. More advanced admin needs may require outsourced assistance, but CRM is now being heavily leveraged for modeling business state, data capture, process orchestration, and reporting.	CRM excellence in progress. Business processes modeled with rigor in CRM, tech stack hooked into CRM, and full time administration in house either as part of sales operations' skillset, or a standalone admin.
Metrics, Analytics, & Strategy	Basic capture, and rudimentary metrics harness around input activity metrics (opportunities, customer facing meetings) as outputs (wins, bookings) are still uncertain. Setting groundwork for "natural levels of performance metrics" to follow.	Beginning of loose goal setting for output as sales motion becomes repeatable and thus the linkage between inputs and outputs becomes more concrete and observable. Stricter goal setting for inputs and activities and monitoring thereof. Rudimentary metrics harness for both inputs, outputs, and efficiency metrics, plus cadenced consumption and review in management meetings. Implemented in-CRM reporting or third party performance analytics solutions.	Evolved metrics harness adding more advanced metrics on top of core metrics. Recurring consumption, and deep dive analytics. Input and output goals are set per role, per segment, monitored and reported out on. Performance is managed based on metrics in 1:1s, team meetings, and monthly performance lookbacks. Ramping metrics are monitored for new hires. Metrics form the solid basis for business planning.	Metrics are used for monitoring rep by rep for early warning issues, and used to evaluate managers for their performance. Metrics are used at rep level, team level, and organizational level, to monitor new hire ramps, steady state performance, and pinpoint training opportunities pan-organizationally, and rep-by-rep.
Data Management (Accounts & Contacts), Territories / Named Accounts	Rudimentary conception of a few hundred accounts that could be good targets - perhaps derived from beta program or customer advisory board. One-by-one contact identification as necessary, but frequently early selling is done via network selling. As early selling is done and Ideal Customer Profile (ICP) is refined, pivot into other account pools as needed.	Beginnings of "full CRM" strategy - comprehension of what ICP looks like for accounts and clear numerical leading indicators of demand, and titles look like for contacts, and thus can use third party data sources to proactively identifying a few thousand high priority accounts and associated contacts, and fill CRM with them. Territories largely round robin assignment off most compelling accounts and inbound and "open territory" otherwise.	Solidified "full CRM strategy" with TAM Accounts and Contacts pushed into CRM, Contact personas tagged in a structured fashion, and connected to cadencing software for optimal persona-appropriate automation.	Full CRM strategy continues to enhance, with recurring data cleaning work to identify net-new Contacts in Accounts, and refresh Account meta-data as relevant (# of employees, other key signfiers of demand). Extension of further customized Account and Contact metadata for enhanced mailmerging / engagement.

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Selling Behavior				
Selling Process, Stages, Handoffs, Rules of Engagement	Undeveloped. In progress of being figured out. Stages will be loose and evolving.	Sales stages starting to have more concreteness. Informal handoff methodology for SDRs and AEs. But generally speaking, change is the constant and flexibility is king.	Sales stages are more substantially set or set, full stop. Entry and exit criteria are clear and inspected. CRM validation rules and data captured may be used to enforce this. Handoffs are facilitated via CRM fields and handoff SLAs are in place. Initial renewal process is implemented. Crispness around rules of engagement so reps don't step on each other.	More business process modeled into the CRM for sales strages, handoffs, and rules of engagement. Sales methodology adoption often shows up at this stage, with commern-surate structure in the CRM.
Demo, Presentation	Early sales deck & demo approach. Video presentation software. Call recording in place to capture early calls for use with product feedback and later hiring.	Beginning of demo script & dedicated sales deck based on prior maturity stage. Call review and call ridealongs with reps to speed solidification of strong presentation.	Solidified sales deck, demo script, objection handling FAQ. Sales deck housed in collateral management sale for presentation and later sending. Demo instance of product for use in sales cycle. Consistent call recording & review.	Demo & presentation certification process. Specialization of presentation materials based on vertical / segment / persona of prospect. Recurring call listening implement-ed for management / enablement.
Sales Content Management	Production and capture of content in a way that enables single seller, but with an eye towards eventual use by others.	Content is managed and captured in a way that is easy for team to access, but in a lightweight fashion. Google Drive, Google Docs of FAQs, objection handling, process docs, etc.	Sales content starting to be housed in a content management system.	Rigorous sales content management with per vertical / solution messaging tagged as appropriate in management system. Specialty sales content production like competitive or vertical-based battlecards / decks start showing up.

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Appointment Setting				
Inbound Process	Minimum viable demo request form in place, with email auto-responder, and a process for manual follow up.	Demo request form back by SDR assistance. Potentially chatbot in place. Consider inbound linkage with marketing automation software.	Inbound "lead signup" and drip with maturation. Calendar automation / chat bot implemented. Dedicated inbound SDR with rapid response SLAs. Starting to work on paid acquisition channels to drive traffic to inbound funnel. Lead routing intelligence software in place to route leads to relevant Accounts and Opps and alert relevant SDRs and AEs.	Multiple inbound SDRs working with round robin functionality facilitated by smart calendaring solution. Potentially live-chat (non-bot) on website.
Outbound Appointment Setting Process	Early templates and one-off mail merging off of standalone lists.	Beginnings of repeatable mechanism for outbound engagement of ICP accounts and contacts that convert to meetings / signups. Cadence software implemented for SDRs, in conjunction with identified Accounts & Contacts.	Cadence software now meaningfully interacts with CRM from an Account & Contact ownership and mail-merge standpoint. Uses persona data on Contact objects to select and populate templating.	Enhanced Account Based sales development being executed with multiple personas and cadencing against them.
Sales Compensation	No performance based comp.	Minimum viable performance based compensation - "take care of the reps" mindset, where comp plan is based on conservative estimates of performance from prior stage, and subject to change. Try to overpay for performance (but not obscenely - target at most a 30%-40% cost of sales) such that reps constantly chase higher and higher, revealing "true performance state."	More concreteness around performance comp with more data. Keep it simple stupid and don't get fancy. But now with more data, performance comp is more defensible and can be tuned more accurately. Commissions calculation done out of spreadsheets for now. Start constraining costs of sales down into the 20%-30% range.	Precise sales comp, measurement of proportion of reps at quota vs. not. Opportunities for accelerators, spiffs, etc. Beginnings of software-assisted commissions calculation.

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Advanced Topics				
Enablement: Rep Onboarding / Ongoing Training	Founder seller building sales motion that will later be taught to next hires.	Organic and more informal onboarding and ongoing training. Onboarding involves marketing, product, pitch, and demo training and much repetition. Ongoing training involves ridealongs and coaching.	Implementation of formal onboarding process, with pre-hire curriculum, week or two based "onboarding" process and curriculum for both subject matter and also processes. Ongoing training implemented as part of operating ryhthym in form of recurring training embedded in meetings.	Addition of dedicated enablement resource. Learning management system implemented for onboarding and ongoing training, testing, certification.
Pricing, Proposals, Order Forms, E-Sign, Deal Desk	Early flexibile pricing looking to optimize win rates. Proposals and order forms are templated Google docs manually sent via esign.	Pricing is starting to cement. Templating proposals and order forms in place for ease of rep usage. Deal oversight only in odd exceptions.	Pricing now set. Move order form into automated e-signing solution that links to the CRM. Pricing now implemented in CRM via "products" and similar. Clear conditions under which oversight is needed for pricing customization.	Proposal automation driven off of CRM data. Consider CPQ implementation depending on volume of orders. Dedication of a slice of sales operations to "deal desk" and RFP support.
Pipeline Management & Forecasting	Self-pipeline management to drive deals to close, but insufficient repeatability and consistency for forecasting to be worthwhile.	Pipeline review meetings to drive account-ability and cleanliness. Best effort "forecasting" via pipeline rigor.	Active forecasting layered on top of rigorous pipeline reviews. What's coming in this month, etc. Metrics to ensure "Clean your room" is happening and to assist with pipe management and forecasting.	Pipeline management and forecast assistance software layered on top of manual forecasting approaches.
Sales Hiring Process	NA	Primarily network hiring perhaps assisted by recruiting agency assistance. Beginning of a sales hiring profile hypothesis to be backchecked, but early for a cut and dried "profile". Generally hiring here should focus on creativity and flexibility of reps.	More concrete hiring profile. Rigor around assessment / testing in the hiring process. Tracking hiring metrics to ensure that hiring goals will be hit, such that growth goals enabled by those hires are hit.	Beginnings of hiring machine and SDR=> AE promotion pipeline.
Technology Acquistion Process	Informal	Informal	Project based	OKR based