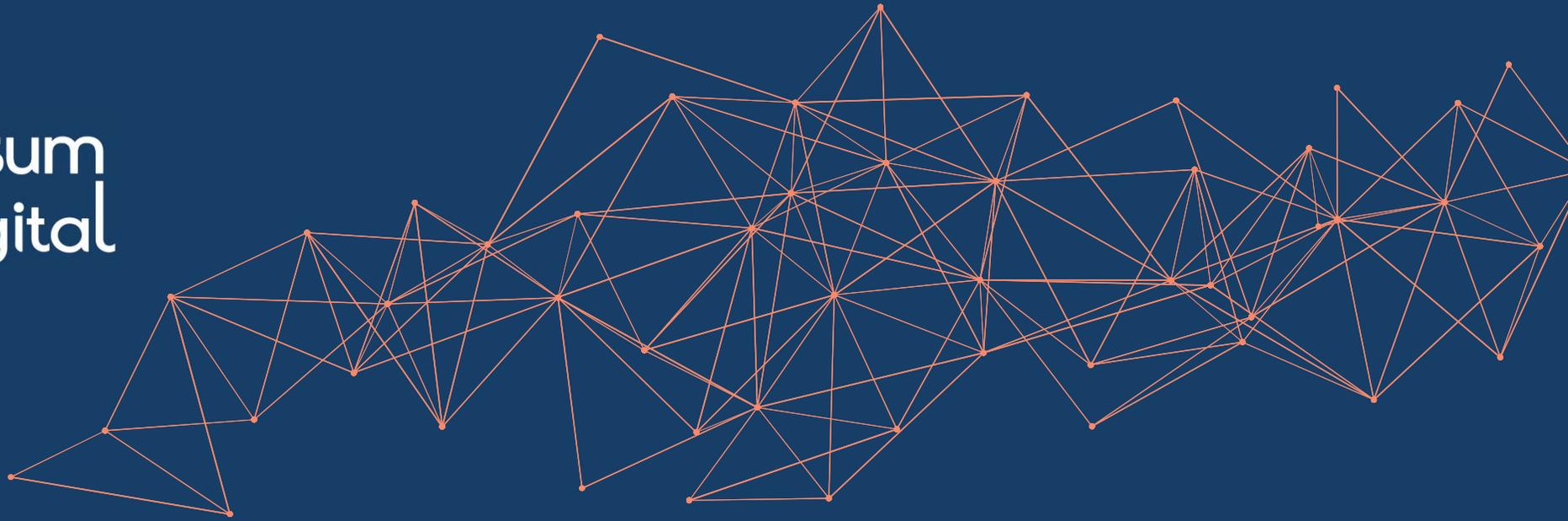


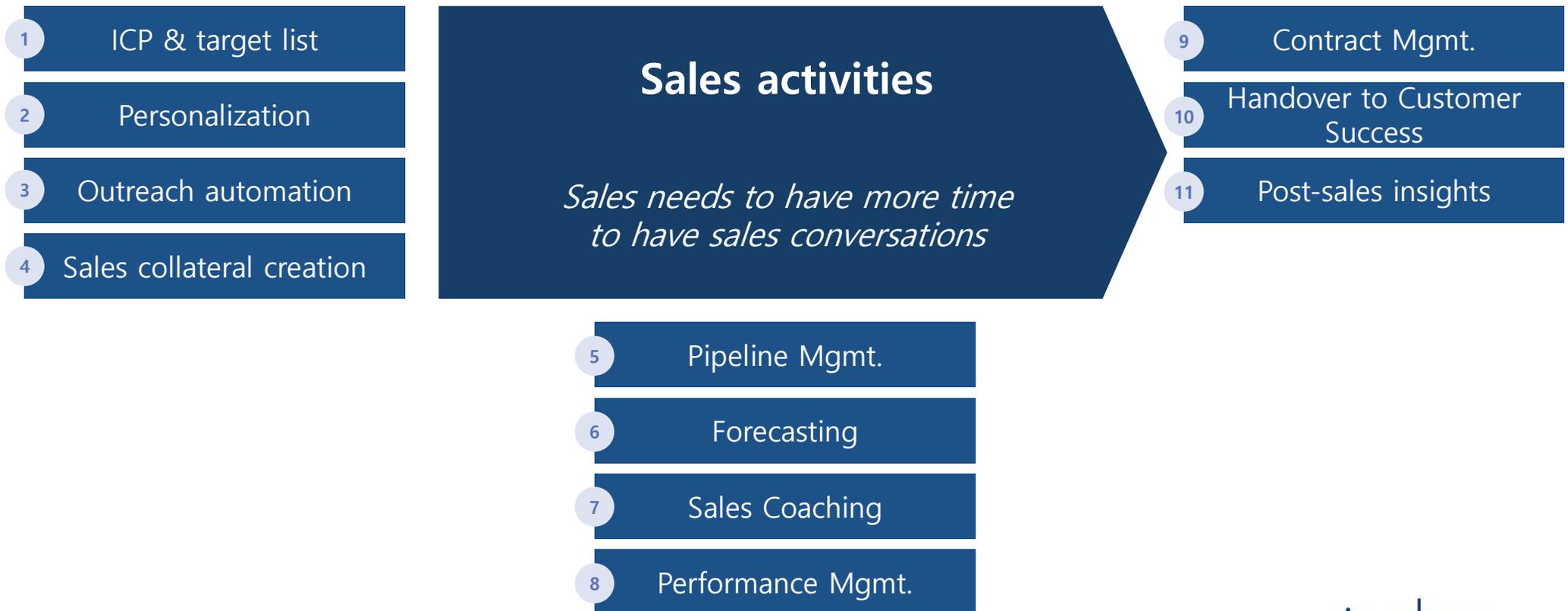
impulssum
Digital



PULSE

Get full visibility on sales activities to steer and coach towards better sales results based on data

Sales people need to spend more time selling, and being enabled with effective processes around them that increase quality and reduce cost





*Automations and AI
can help to deliver*

- **Better quality communications**
- **Higher volume communications**
- **Lower cost of sales (time reduction)**

Sales activities

Sales needs to have more time to have sales conversations

1 ICP & target list

2 Personalization

3 Outreach automation

4 Sales collateral creation

9 Contract Mgmt.

10 Handover to Customer Success

11 Post-sales insights

5 Pipeline Mgmt.

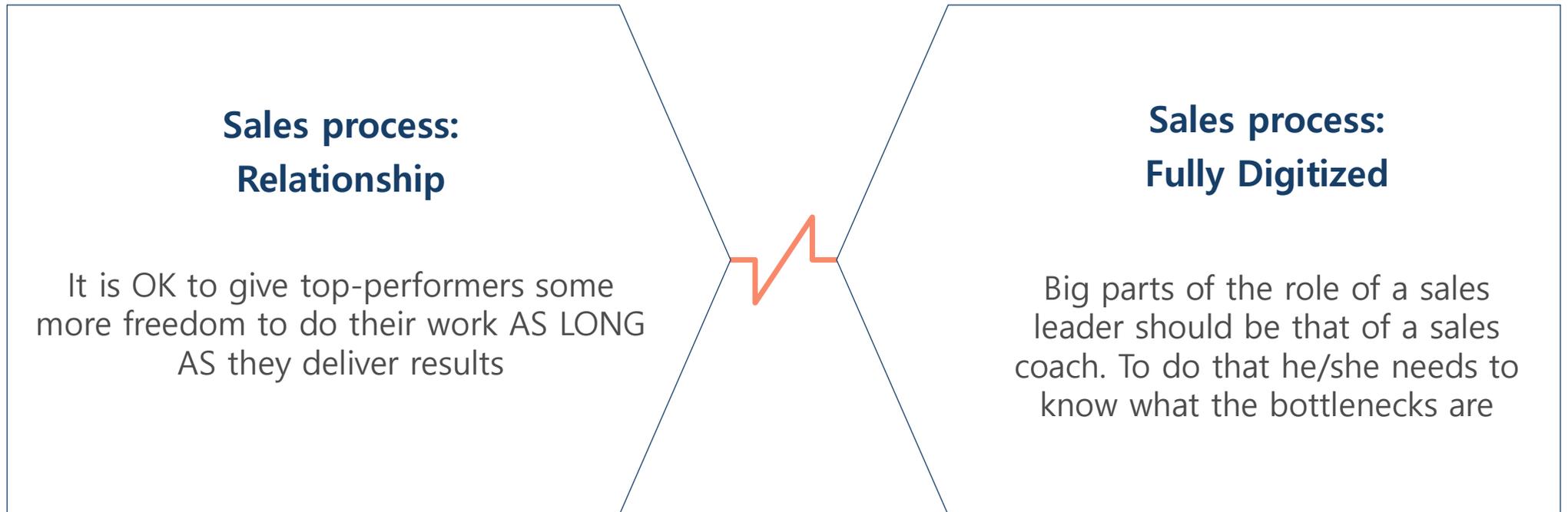
6 Forecasting

7 Sales Coaching

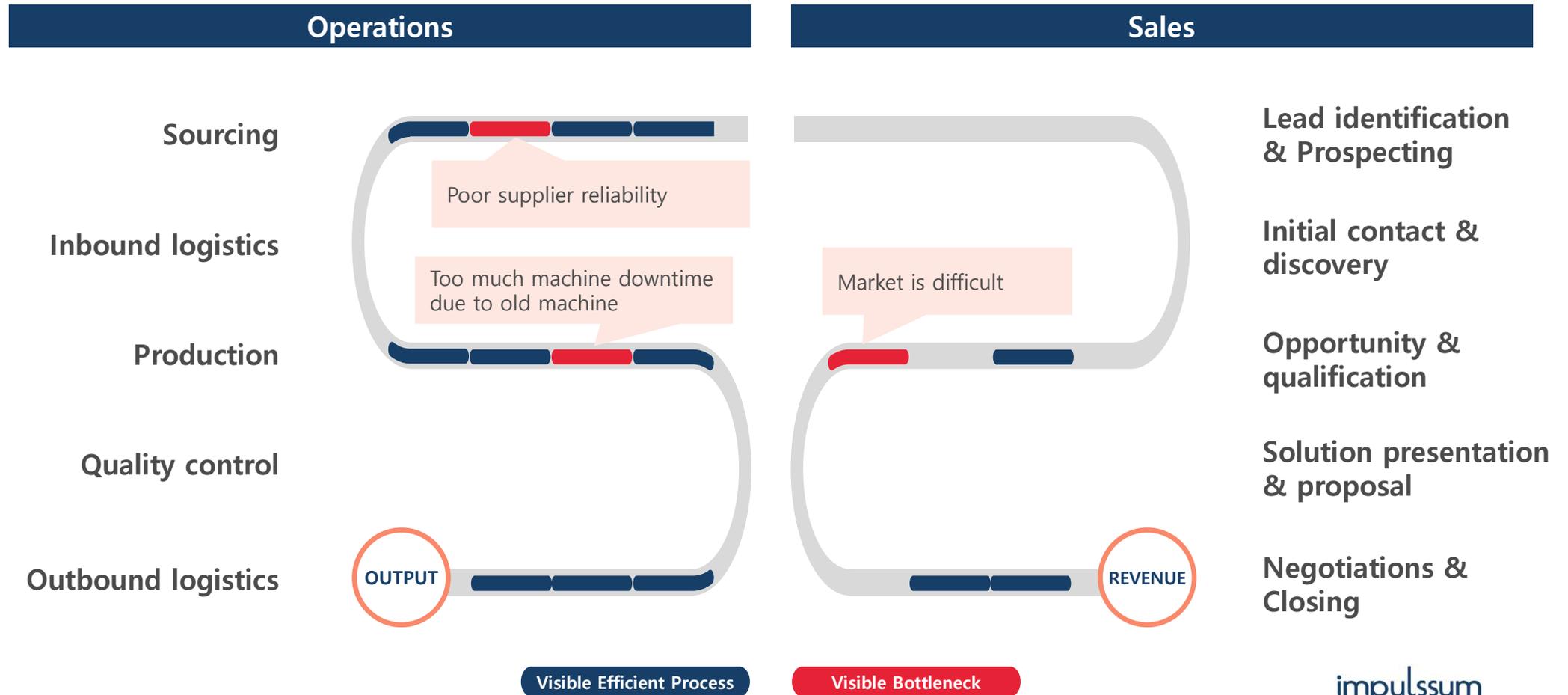
8 Performance Mgmt.

Use case: How to increase visibility into the sales process activities, and understand exactly what drives sales improvements

Sales is traditionally a relationship driven way of working, and sales efficiency isn't necessarily related to higher digitization

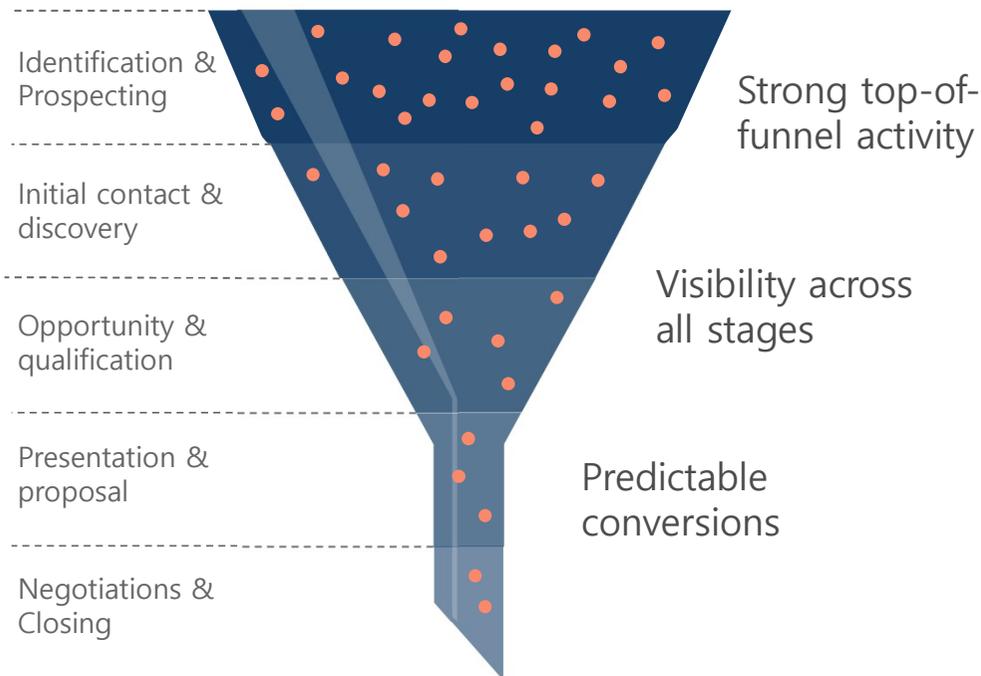


In many other parts of the business, you have visibility on the underlying processes and what bottlenecks are ... however not in Sales

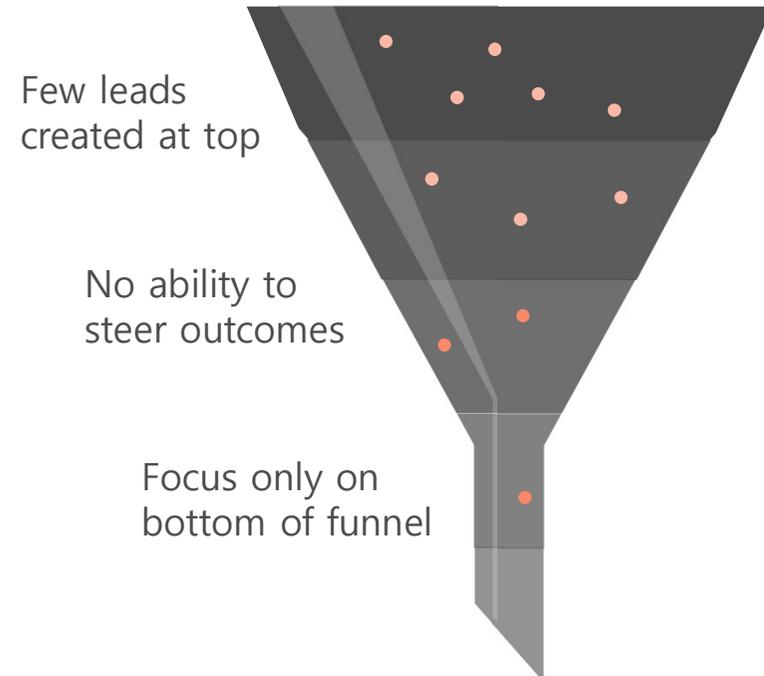


However, in order to be able to actively steer towards a positive outcome (Revenue), it is important to influence the activities salespeople undertake

Strong top-of-funnel to predictable revenue



Weak top-of-funnel leads to missed targets



Sales steering is mostly too generic, so that it loses its effect and salespeople don't see the relation to their individual targets

Why generic steering fails

Many companies steer business with e.g. stating that a salesperson **needs to have 5 meetings** per week

The issue with this is that:

- Salespeople have **different customer base**, markets and targets
- Each salesperson has **their own conversion** in their **individual sales style**

Hence, one salesperson might need **10 meetings** and another only **3 meetings** to reach their targets

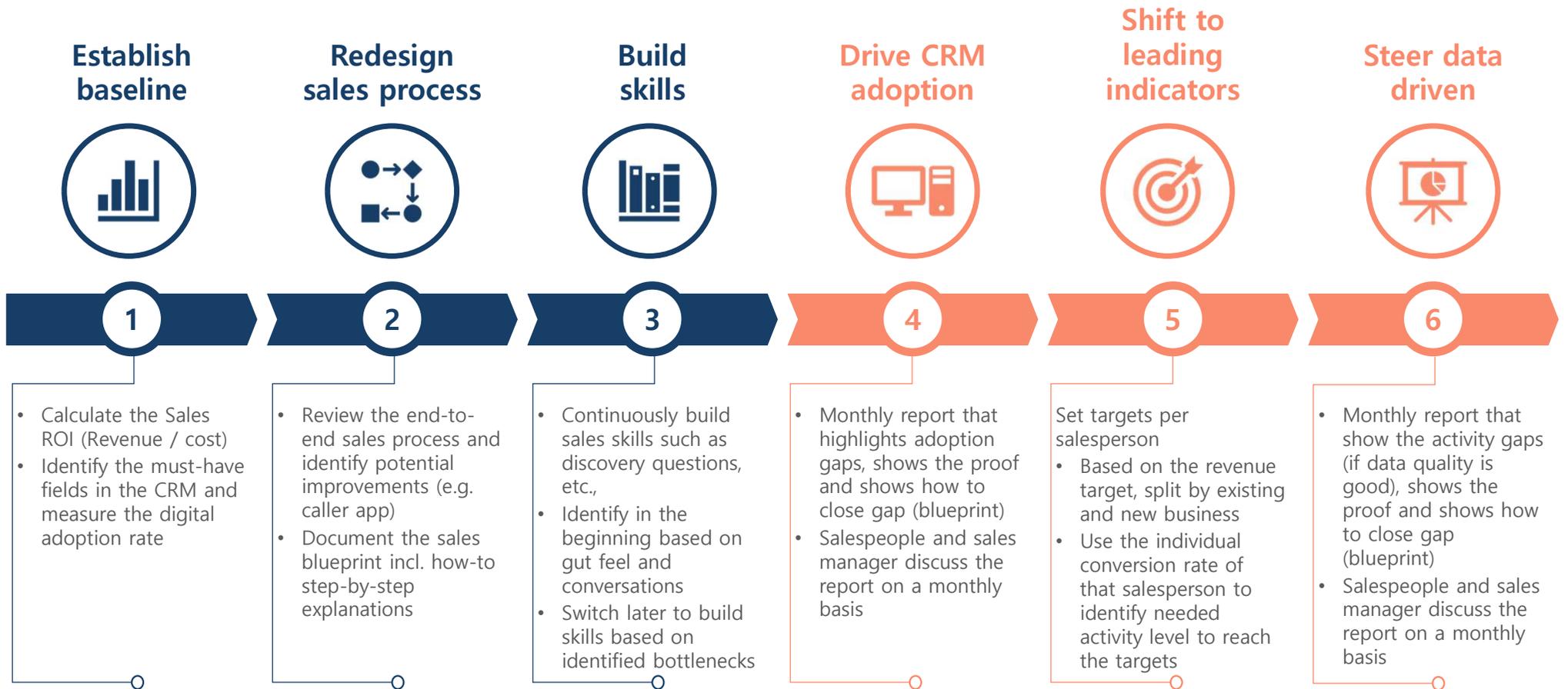
Individualized target steering

- We hence need to look at their **individual targets** (simplified in existing and new customer revenue)
- Then we need to take their **individual conversion** rates from existing and new customers to **calculate backwards** what their sales activity needs to be to meet these targets

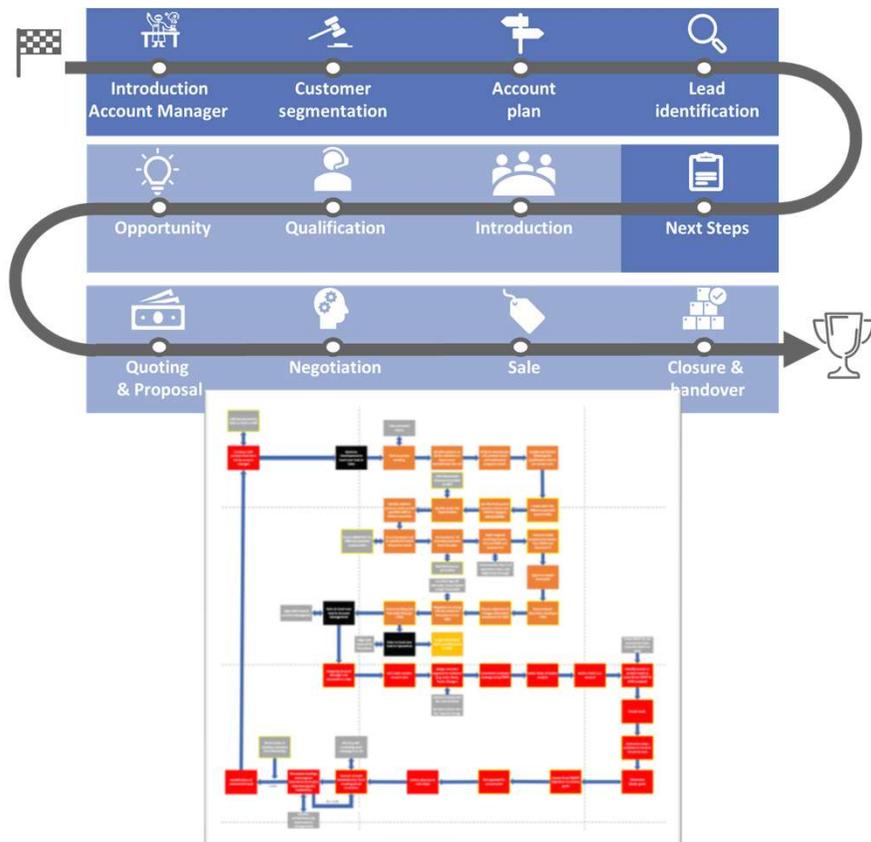
If you want to build a system that allows you to steer sales results and coach salespeople, you need to have visibility on their sales activities



Implementing the “CRM as a Profit Center” active sales management approach, is a 6-step process



By (re-)defining the sales process, we were able to identify improvements that allowed to increase the data quality and reduce time of people



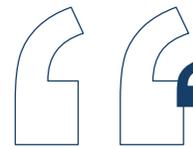
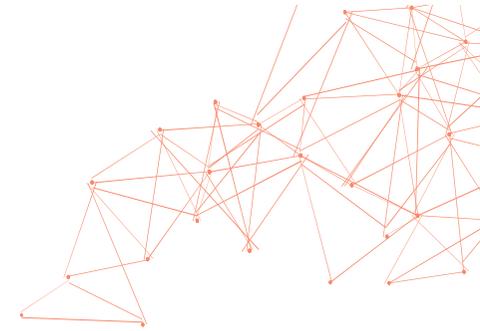
Implemented VOIP caller app that tracks and logs all calls immediately in the CRM incl. AI summary



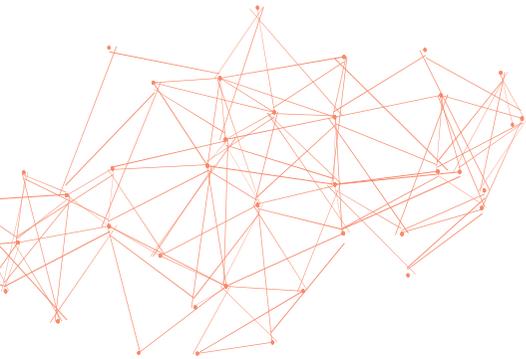
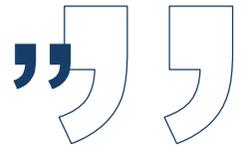
Implemented sales outbound automation that allows to scale outbound activities by including sales ops

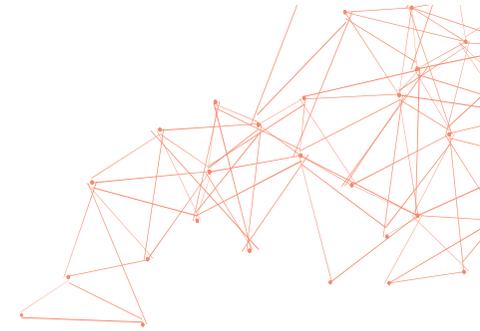


Included Marketing to create and post content for salespeople on LinkedIn based on available hero content

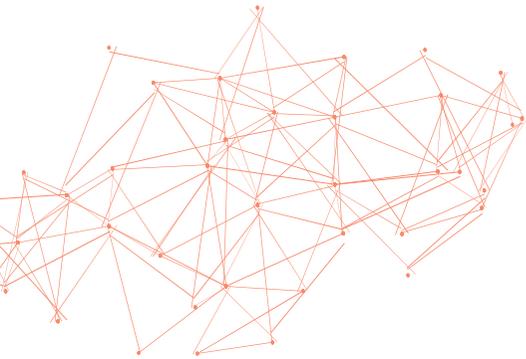


60% of CRMs don't deliver the value they should because they are not used well (adoption & actionable insights)

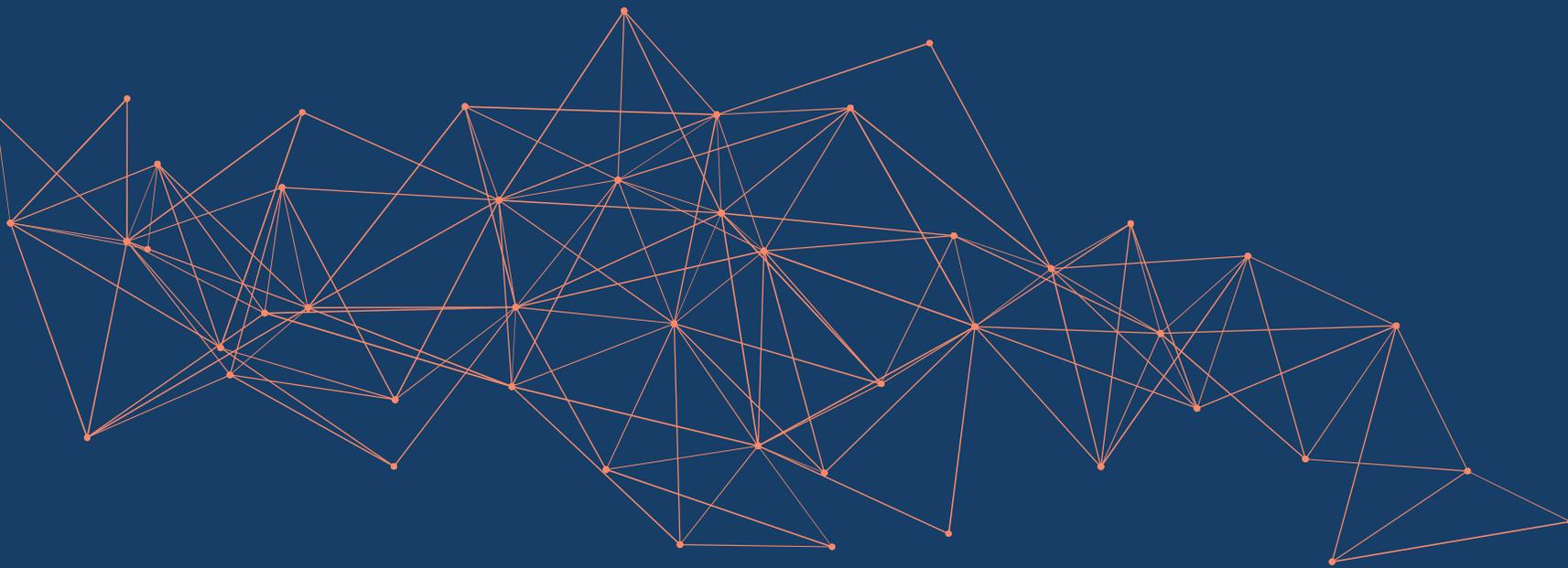




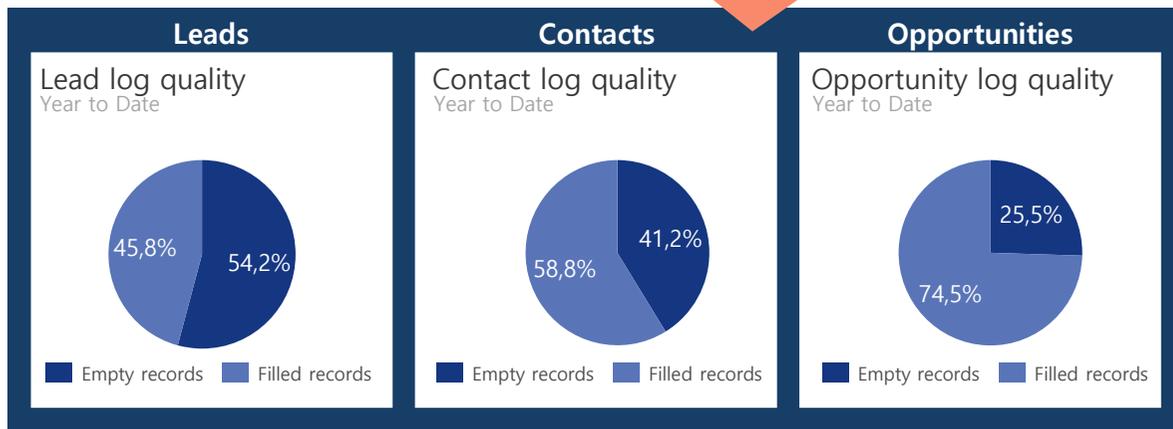
“ A properly-used CRM can boost revenue
by **29%** with improved forecasting
accuracy of **32%** ”



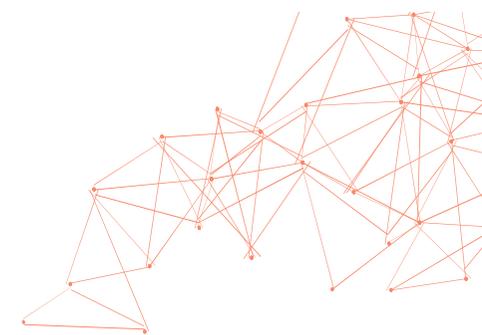
A few examples how we can see that the adoption is not good and how we let people know what to do



We have defined the must-have fields for this view, so this employee doesn't enter all the necessary data



- While the data quality increases as we go down the funnel, it still has too big gaps
- Most likely fields to miss for opportunities are deal value making forecasting difficult

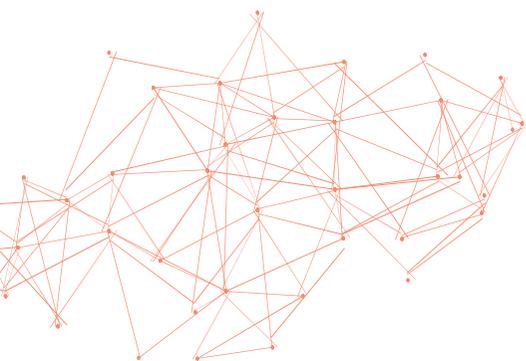


Report: Leads with converted lead information
Leads By Source This FY

Lead Source	Lead Owner	Company / Account	First Name	Last Name	Email	Title	Rating	Created Date	Phone
Outbound: Industry (31)	[REDACTED]	Logpoint	Lance	Chimenti	-	Regional Sales Manager of North America and Asia	-	19-05-2025	-
		Trackunt	Daniel	Mogensen	-	Business Development Director	-	19-05-2025	-
		Kainos	Mark	Oldfield	-	Business Development Director - Transport	-	19-05-2025	-
		Thales Cybersecurity Products	Haroun	N	-	Regional Sales Manager France & North Africa	-	19-05-2025	-
		Hubexo	Matthew	Crowe	-	Vice President Sales, Project Information UKI	-	19-05-2025	-
		Soldo	Jason	Tooley	-	Chief Sales Officer	-	19-05-2025	-
		Sis	Andrew	Rowney	-	Sales Director, UK	-	19-05-2025	-
		Cch Tagetik	Simon	Larkham	-	Associate Director, Field Sales	-	19-05-2025	-
		Torq	Brad	J	-	Regional Sales Manager	-	19-05-2025	-
		Benifex	Adam	Mason	-	Chief Strategy Officer (CSO)	-	19-05-2025	-
		Lusha	Aaron	Moloney	-	Regional Sales Manager - UK	-	19-05-2025	-
		Cloudpay	Christina	Lewis	-	Senior Manager, Global Mid-Market Sales	-	19-05-2025	-
		Globaldata	Paddy	Thorpe	-	Head of Sales and Business Development - Aerospace, Defense and Security	-	19-05-2025	-
		Thales Cybersecurity Products	Rashid	Tlemsani	-	Sales Director	-	19-05-2025	-
		Televerde	Nick	Beecroft	-	International Sales Director	-	19-05-2025	-
		Quantexa	Oli	White	-	Director, Healthcare Sales UK	-	19-05-2025	-
		Grafana Labs	Carlos	Silverberg	-	Growth Sales Director, Nordics & Benelux	-	19-05-2025	-
		Arctic Wolf	Graham	Holt	-	Regional Vice President, Sales - UKI & Benelux	-	19-05-2025	-
		Druxa	Nick	Turner	-	Senior Vice President, International Markets Sales, Global SMB & Global Renewals	-	19-05-2025	-
		Sonatype	Charles-	Duport	-	Regional Sales Director - France, Switzerland, Africa	-	19-05-2025	-

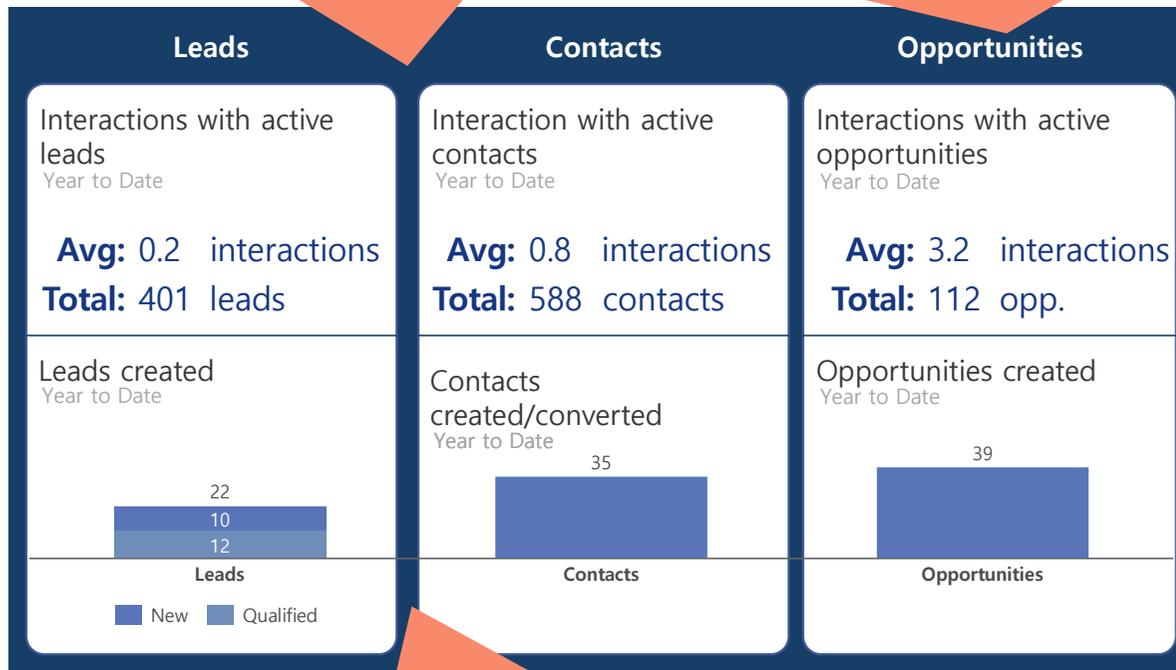
- The graphs only allow us to identify the problem areas
- For each problem area we can then deep dive into the data issues to fix these
- Employees can update data targeted with these lists so that data quality increases over time

Email, Rating and Phone have not been filled in for these Leads, but are minimum required fields



Only ~80 interactions with Leads have been logged, while ~470 interactions with contacts have been logged

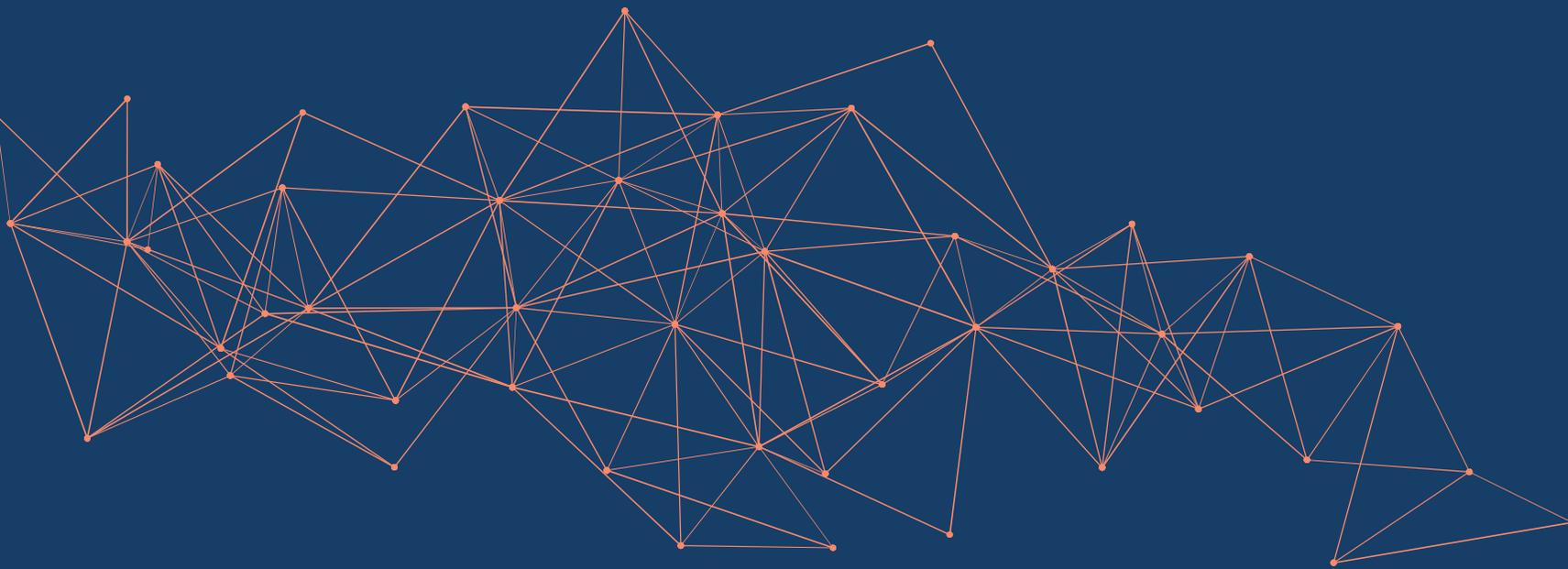
This rep focuses primarily or primarily only logs opportunity related interactions ~360 opportunity interactions vs. 470 contact interactions (+110)



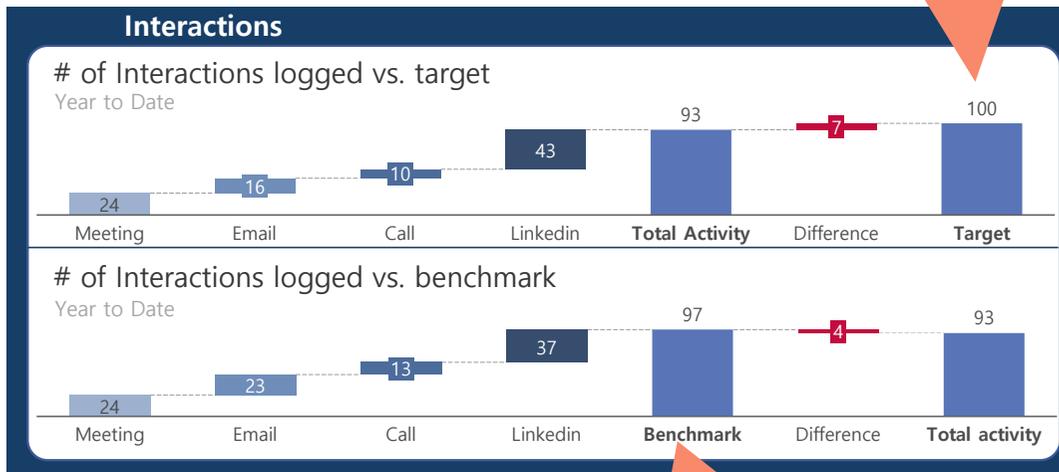
More contacts have been created than qualified Leads, but even more than total new Leads. Probably many leads not entered in CRM

- The data quality of this rep is very weak, as can be seen by the relationship between opportunities (360), contacts (110) and Lead (80) interactions
- Not possible to steer on leading indicators with this sales rep yet
- Coach this sales rep to log all information in the upper funnel as well

A few examples how we coach salespeople to higher sales results

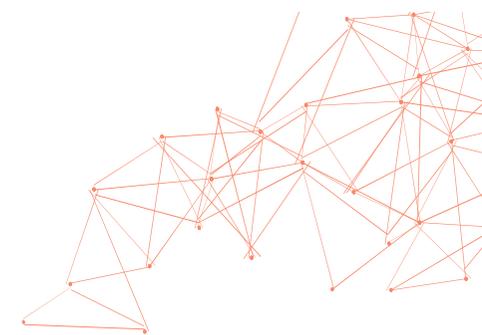


Activity targets are set based on the individual sales targets and the individual conversion rates



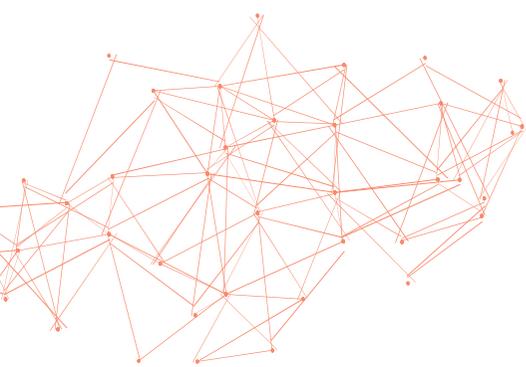
Benchmark is the average of all colleagues in the teams to allow to reach that benchmark

- This employee's activities are 7% below the target that is needed to reach the targets
- Compared to the internal benchmark this employee did 4% less activity
- The person was able to organize the same # of meetings with less activity than the colleagues

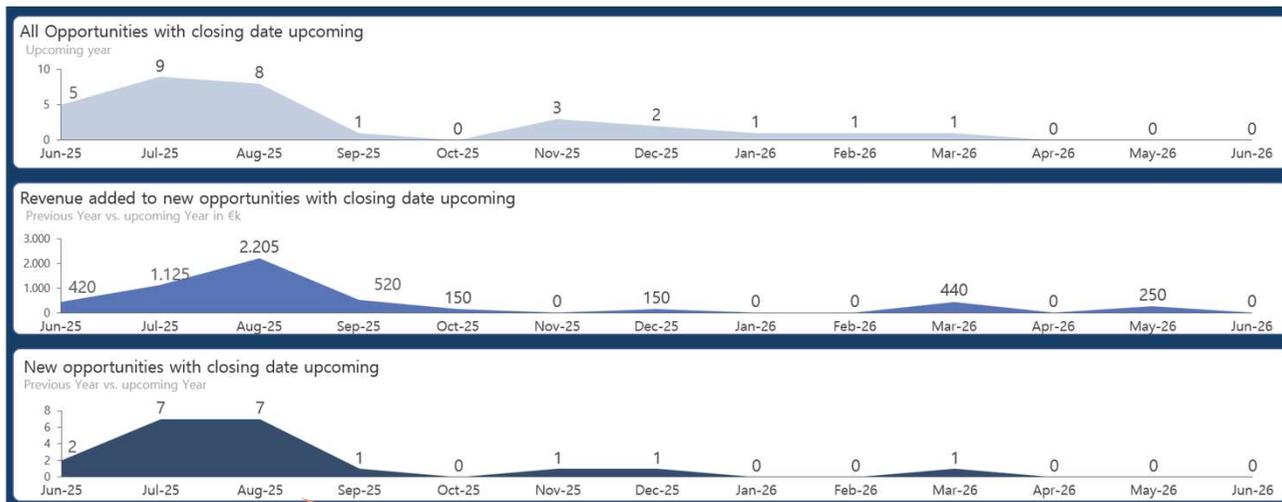
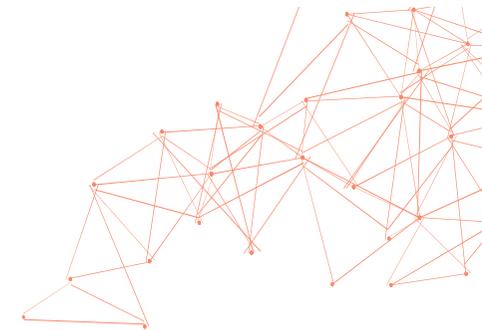


Sales cycle per won opportunity Last year Average: 165.8 days	Sales cycle per lost opportunity Last year Average: 285.1 days
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Likelihood to win reduces gradually to 0% automatically after it passes 195 days up until 315 days

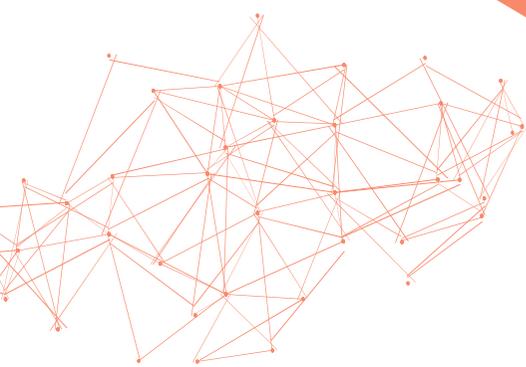


- **We can improve pipeline health analysis and forecasting by diving deeper into sales cycles and adjusting weighing of opportunities based on its age**



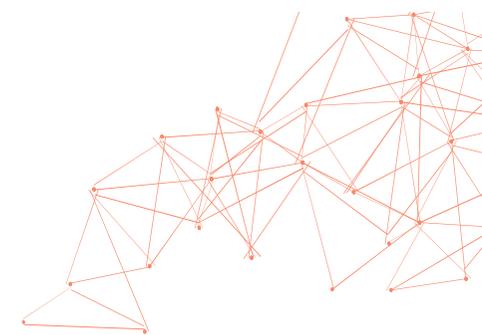
The majority of new deals have an expected close date in the next 3 months

- Historic sales cycle help us to identify opportunities that are added too optimistically
- In this case with an avg. sales cycle of 165 days, it is unrealistic that most new opportunities will close in the next 3 months



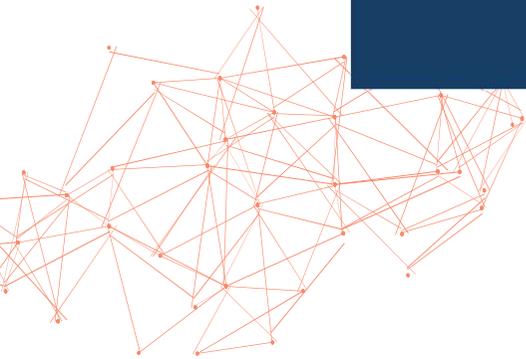
	Current		Target
	Totals	Overview	Overview
Active leads	30%		
Discovery call	50%		
SQL	Total: 272k 88%	Volume: 272k	Volume: 335k
Demo	Total: 239k 55%	29%	34%
Proposal	Total: 132k 60%		
Won Opportunity	Total: 79k	Total: 79k	Total: 114k
Sales YTD (Month 4)		Total: 348k	Total: 460k

- This sales rep is not creating the SQL volume budgeted, so should increase lead outreach activities and qualification activities by 23%
- Also, the conversion from SQL to Won opportunities is -17% weaker, so either improve the conversion (training & coaching) or increase lead activities by in total 44%



The per conversion level colours indicate better/ worse performance vs. internal benchmark

	Current		Target
	Totals	Overview	Overview
Active leads	30%		
Discovery call	50%		
SQL	Total: 272k 88%	Volume: 272k	Volume: 335k
Demo	Total: 239k 55%	29%	34%
Proposal	Total: 132k 60%		
Won Opportunity	Total: 79k	Total: 79k	Total: 114k
Sales YTD (Month 4)		Total: 348k	Total: 460k



- Next to investing more time into lead outreach activity, this sales rep should also investigate improvements to the process
- The problem here could either be not ideal lead lists, too much pushing people into Demos from discovery calls and/or weak proposal & closing skills

While salespeople and leaders get access to our dashboards, the main item they look at is the monthly activity advice report per salesperson

Everyone has access to the dashboards, that have their data in it ...



... the activity reports though highlight the most important improvement activities



Person 1



Person 2

Usage

Needs improvement

Good

Forecasting

Unreliable

At risk

Actions

Log all lead calls, use the caller app for all outbound calls

Call activities for new customers needs to improve by 20 calls a week

Side effects: With good data quality the use cases for AI increase and you can reduce sales mis-hiring errors

AI insights from sales calls



Identify behaviors, skills, and scripts of top vs. low performers with AI and auto create individual trainings



Extract buying signals from recorded calls to improve lead scoring



Build benchmarks for consistent sales execution

Stronger steering & hiring



Early visibility of sales activities of new hired sales reps enables faster coaching & improvement identification



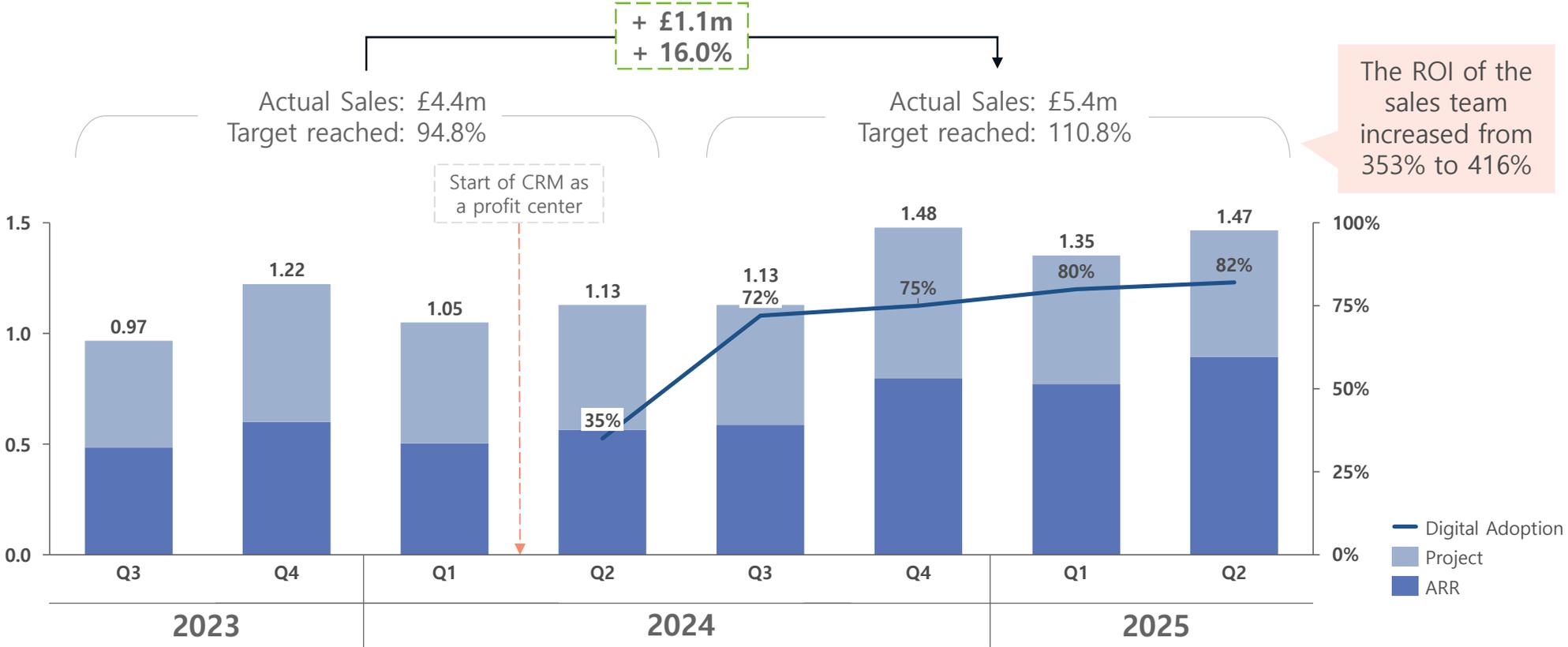
Improved onboarding and quicker productivity of new hires



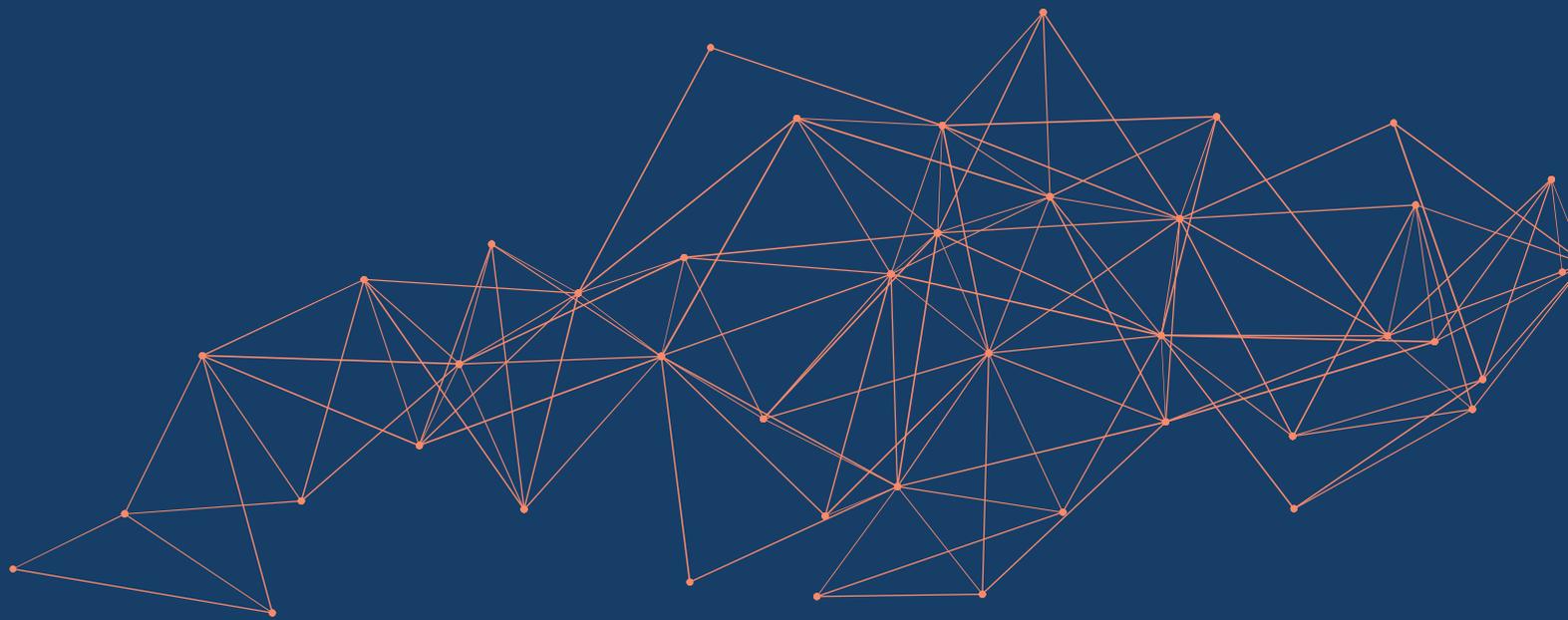
Use in recruitment via roleplays, mock calls, or test work

Customer case: Focus on increasing data driven steering led to increase in ARR that was mainly driven by an increase in cross-selling in this case

Gross profit sales performance per quarter for past 2 years
 In Gross Profit in Mln £



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