

# Top of Funnel Pipeline Forecasts

Understand the 1 metric to focus on

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KRONOLOGIC



# Presenters



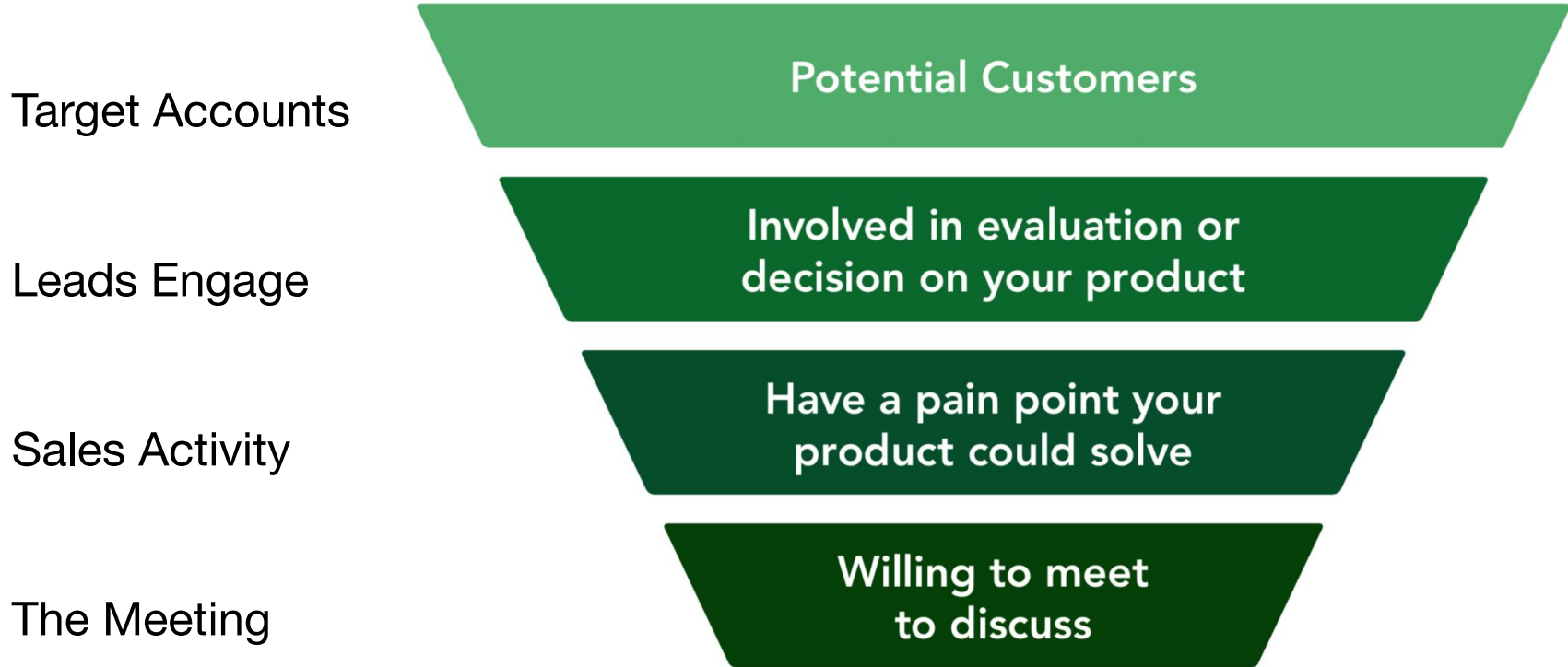
David Dulany  
Founder



Scott Logan  
VP of Marketing



# Pipeline Building Starts Here



# The Leading Indicator Challenges of Forecasting

## **Metric**

## **Challenges**

Leads	Major volume differences across sources/ABM
Sales Activity - Calls/Emails	Results from lots/few actions depends on rep
Meetings - Discovery/Demo	Very manual process / takes a lot of time
Opportunities / Deals	Reps are closing as SDR sprint hit deal goals
Pipeline	Accurate amount set at Stage 2 or 3

# When Goals Aren't Met... Mid-Managers Actions

<b>Role</b>	<b>Corrective Action</b>
Marketing	<p>Change MQL criteria</p> <p>Spend more money on campaigns</p> <p>Push more leads to SDRs = more activities in their to-do queue</p>
SDR/BDR	<p>More sales activities = slower response time</p> <p>Slower response time = lower conversion rates</p> <p>Qualify quicker/less quality to hit deal generation goals</p>
Sales	<p>Focus on low hanging fruit: late stage deals, expansions, self-sourced</p> <ul style="list-style-type: none"><li>- Less focus on SDR sourced deals</li></ul> <p>EOM, EOQ, EOY crunches between AEs and SDRs don't align</p> <ul style="list-style-type: none"><li>- AEs are busy closing at the same time SDRs push the most deals</li></ul>

# Executive View vs. What Really Happened

**SDR's Created  
More Deals**

## **Deals Not as Qualified**

More time is spent maintaining SLAs on the activity to-do queue and lead coverage, leaving less time for quality discovery, resulting in a higher volume of less quality deals.

**Marketing Generated  
More Leads**

## **Too Many Sales Activities**

**Last Quarter**

1000 Leads = 10,000 Activities

**This Quarter**

2000 Leads = 20,000 Activities



**AE's Closed  
More Revenue**

## **Revenue Sourced Outside of Investment**

To hit higher revenue/bookings attainment, reps closed deals outside of the Marketing and SDR investment

## So Now What?

How do we align better?

How do we forecast better?

# Best Leading Indicator - THE MEETING

**Leading Indicator** (Not Lagging - like pipeline, like bookings, like funnel dynamics)

- You can see how many discovery meetings are booked weeks into the future.

## **Meeting Volume**

- Only leading indicator qualified by independent, impartial 3rd party experts - **Your Buyers**
- Highest intent signal - all sales' activity is to drive meetings in the first place

**Technology** has centered around the Meeting

- Recording/Analyzing the Meeting recording - Gong, Chorus.ai
- Passive, link-based scheduling - Calendly

## **Secondary Insights:**

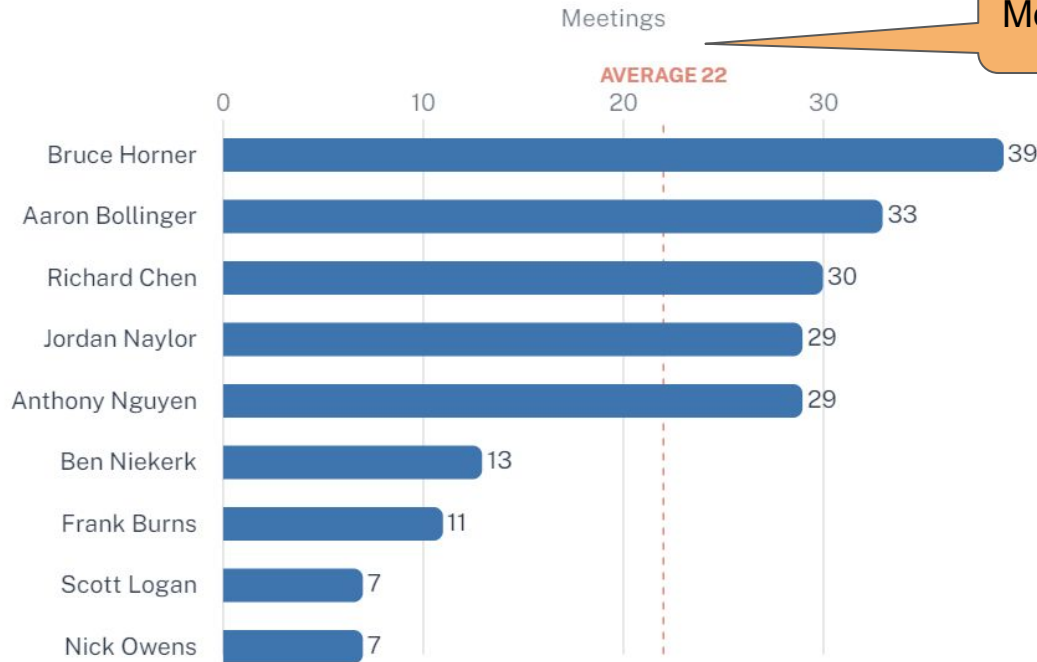
- Segment by: Lead Source, Rep/Team, Prospect Persona, Product, Industry, etc.
- Are deals multi-threaded?



# Forecasting Benefits of the Meeting Metric

<b>Role</b>	<b>Benefits</b>
Marketing	<ul style="list-style-type: none"><li>No longer defending the ebbs and flows of lead volume</li><li>Campaign results are seen FAR sooner than waiting for deal creation</li><li>An accepted meeting is the ultimate intent signal</li></ul>
SDR/BDR	<ul style="list-style-type: none"><li>An accepted meeting is the ultimate intent signal</li><li>Can see 1-3 weeks ahead of time if there will be enough pipeline</li><li>Can adjust the booking of meetings to align with EOM AE crunches</li></ul>
Sales	<ul style="list-style-type: none"><li>SLA hand off between SDR and AE - tracking deal requirements</li><li>Knows if they need to start self-sourcing deals 1-3 ahead of time</li></ul>

# Call Recording Tools - Center around Meetings



Meeting volume is a primary metric

The meeting is providing real-time and accurate measures to active pipeline.

How many meetings with:

- Deals in each funnel stage
- Customers with upside
- Net new logos
- Which personas

CHORUS

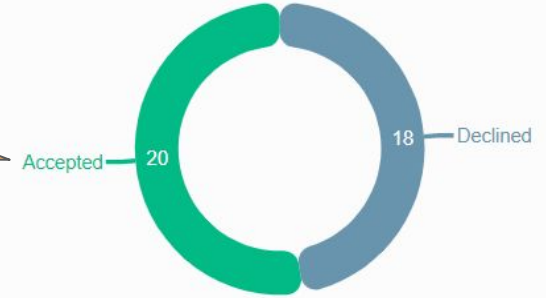
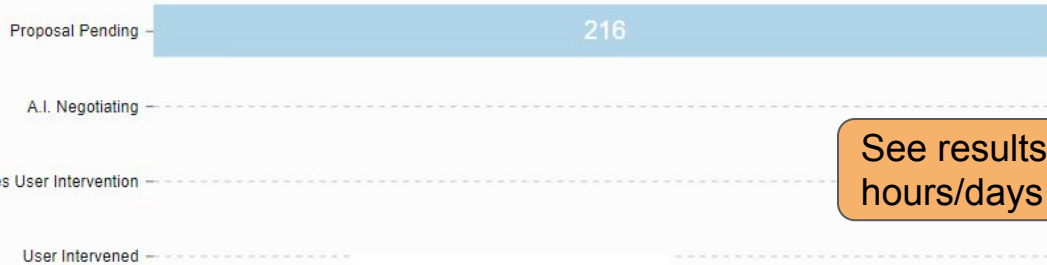


# Meeting-based Dashboard



Scheduling: 216

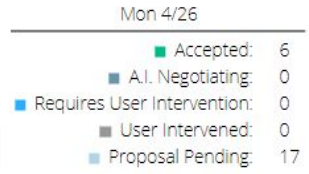
Final: 38



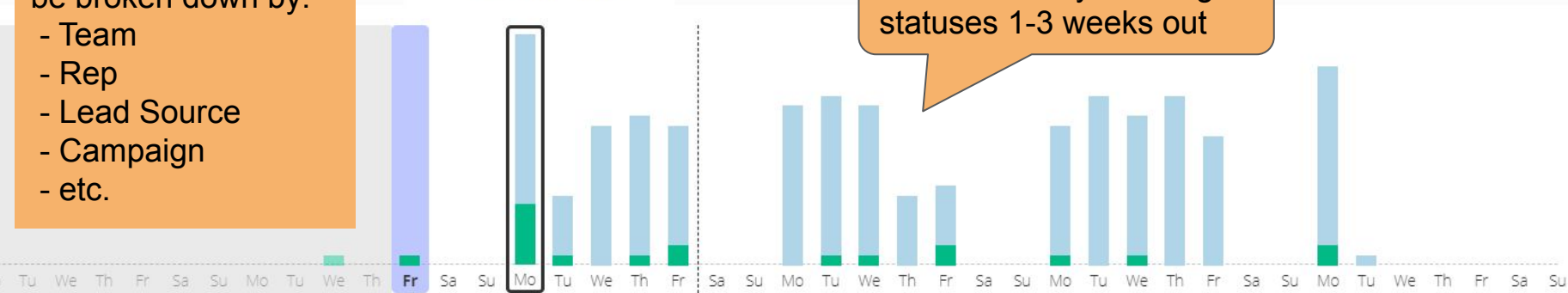
See results in hours/days

Meeting metrics can be broken down by:

- Team
- Rep
- Lead Source
- Campaign
- etc.



See how many meeting statuses 1-3 weeks out



How do we set a meetings goal?

# The Traditional Math

**Goal:** \$500K in Revenue

**Avg Deal Size:** \$20K

**Close Win Rate:** 20%

**Discovery Meeting to Opportunity Rate:** 50%

**How many wins do I need for \$500K in revenue?**

\$500K revenue / \$20K avg deal size = 25 Wins

**How many deals do I need in the pipeline?**

25 wins / 20% close win rate = 125 deals in the pipeline

**How many discovery meetings do I need?**

125 deals in the pipeline / 50% meeting to qualified opportunity rate = 250 meetings

**Result / Leading Indicator: 250 meetings**

**Almost there, but some Challenges Linger**

Pipeline isn't accurately entered until Stage 2,3

SDR's still spend too much time lead chasing

## Value Per Meeting (VPM)

Average revenue expected from each discovery meeting held, providing a simple value to calculate revenue goals.

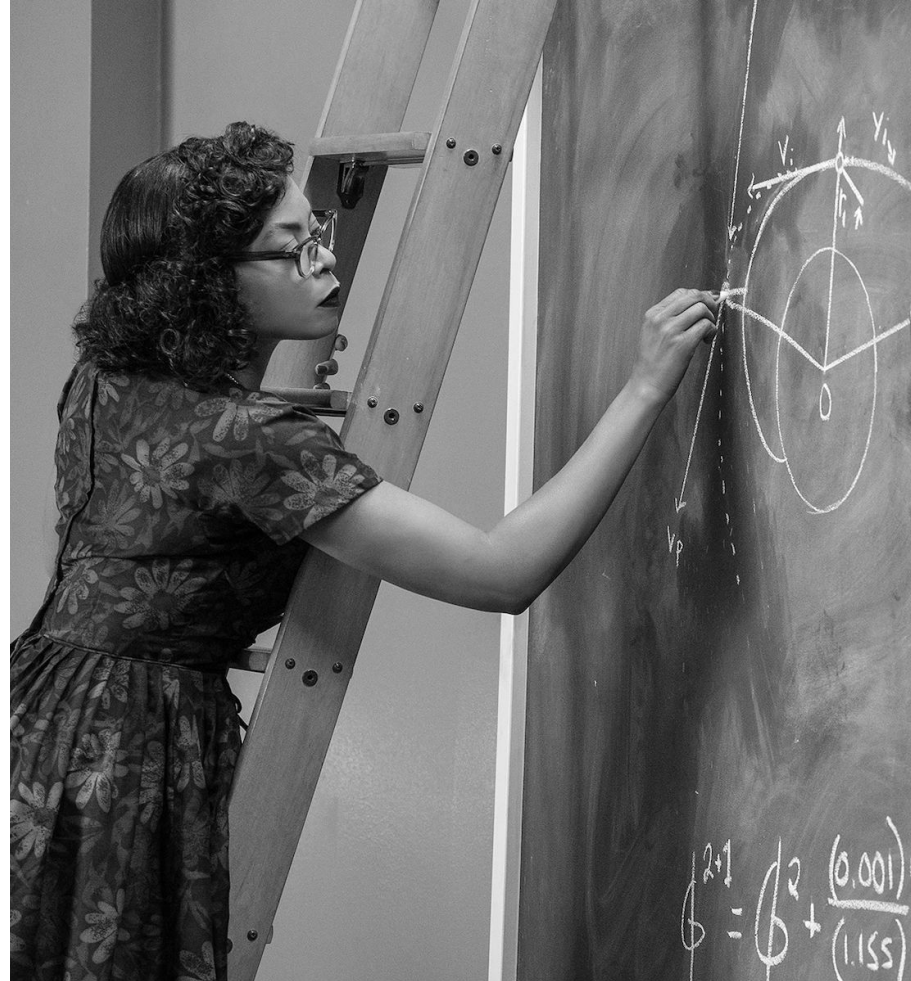
ACV \$20,000

(x) Opportunity Win Rate .20

(x) Meeting to Opportunity Conversion .50

Value Per Meeting: **\$2,000**

\$500K Rev Goal (/) \$2000 VpM 250 mtgs



# Advanced Forecasting Benefits of the Meeting

<b>Role</b>	<b>Benefits</b>
Marketing	Using Calendar 1st™ methodology / automation <ul style="list-style-type: none"><li>- Deliver the Meeting, not Lead Lists</li><li>- <b>SDRs stop lead chasing and focus on the discovery</b></li></ul>
SDR/BDR	Propose meetings with AEs at the beginning of the next month when approaching EOM, EOQ, EOY. <ul style="list-style-type: none"><li>- <b>SDR gets credit and AE is better aligned with pipeline need</b></li></ul>
AEs	Scale prospecting down as the quarter progresses <ul style="list-style-type: none"><li>- Month 1, 2, 3 = 75%, 50%, 25% prospecting respectively</li><li>- SDR EOQ could be the AE's first month of the Quarter</li></ul>



## Size of the Last Mile Problem

Qualified Leads 1200

(-) Meetings Booked 240

(x) VPM \$2,000

**\$1,920,000\***

*\*Revenue lost from Leads that don't convert to meetings*

How much of that pipeline could you pick up with Calendar 1st™?



# Key Takeaways

## **Calendar Monetization™**

### **Use The Meeting as your central Marketing to Sales Dev metric**

- Track it in your CRM
- Report on with all your reps and teams
- Reporting dashboard looking 3 weeks out

### **Calculate your Value per Meeting**

### **Increase lead conversion with a Calendar 1st™ approach**

- Send contextual, tailored, and timely

# Thank you!

## Q&A

### **Kronologic**

Experience Calendar 1st™ and see how it works

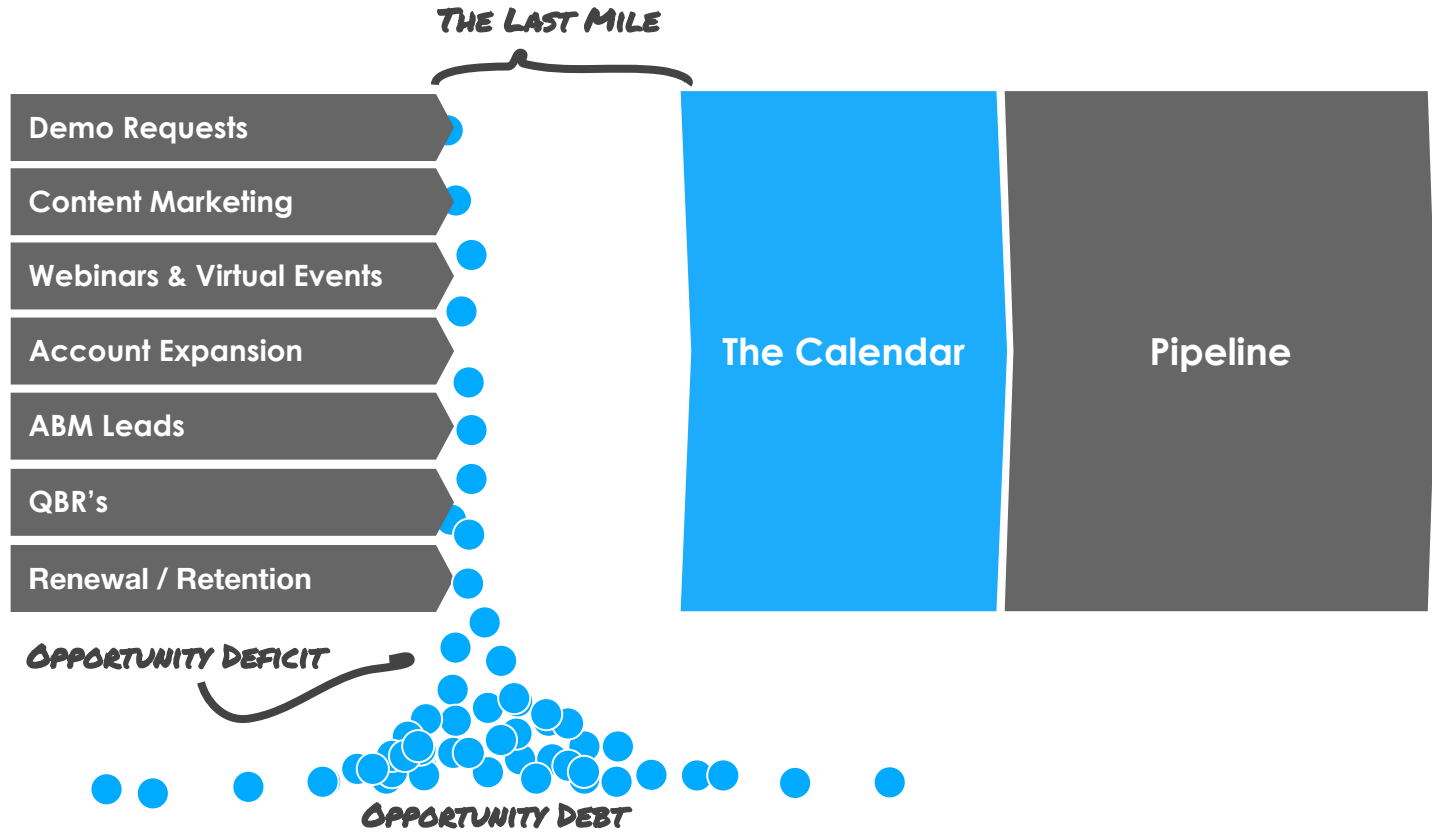
[kronologic.ai/getademo](https://kronologic.ai/getademo)

### **Tenbound**

New book available on Amazon - [\*The Sales Development Framework\*](#)

[Tenbound.com](https://Tenbound.com)

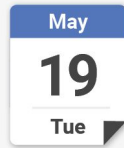
# The Last Mile Problem



# Apply the Calendar 1st™ Methodology



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## How to Use Calendar 1st™ || Kronologic Webinar

[View on Google Calendar](#)

Tues, May 19, 2021 2:30pm - 3pm (CDT)

<https://zoom.us/j/1353>

Yes

Maybe

No

Hi Bryan, Thanks for your interest in the Kronologic webinar. In our presentation we offered an evaluation discussion to speak with us about what using the Calendar 1st™ Methodology would look like for you.

Here is a proposed time to discuss how to boost your pipeline by 2-5X.

If this time doesn't work, I'm happy to adjust to a time that will.

Best,

Scott