Today's Leading Indicators - Challenges of Forecasting

Metric	Challenges
Leads	Major volume differences across sources/ABM
Sales Activity - Calls/Emails	Results from lots/few actions depends on rep
Opportunities / Deals	Reps are closing as SDR sprint to new opps
Pipeline	Accurate amount set at Stage 2/3 - long delay

When Goals Aren't Met… Frontline Actions

Role	Corrective Action	Challenges Worsen not Solved
Marketing	Spend more money	Push more leads to SDRs Add 1000 leads = Add 10K tasks
SDR/BDR	More sales activities Qualify quicker to hit SLA	Slower response Deal quality drops to hit goals
Sales	Focus on low hanging fruit More End of Mth, Qtr, Yr crunch	SDR/Mktg pipeline ignored New pipeline is ignored further

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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

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Focus on the Meeting

Best Leading Indicator - **AN ACCEPTED MEETING**

Only leading indicator validated by **Your Buyers!**

Leading Indicator
- You can see how many discovery meetings are booked weeks into the future.
- Start your funnel with meetings - lead, MQL, and sales activity vary too much based on Lead Source

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

One Metric to Align Sales & Marketing Top of Funnel:
- Segment by: Lead Source, Rep/Team, Prospect Persona, Product, Industry, etc.
- Are deals multi-threaded? Which personas are engaged?

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Value Per Meeting (VPM)

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

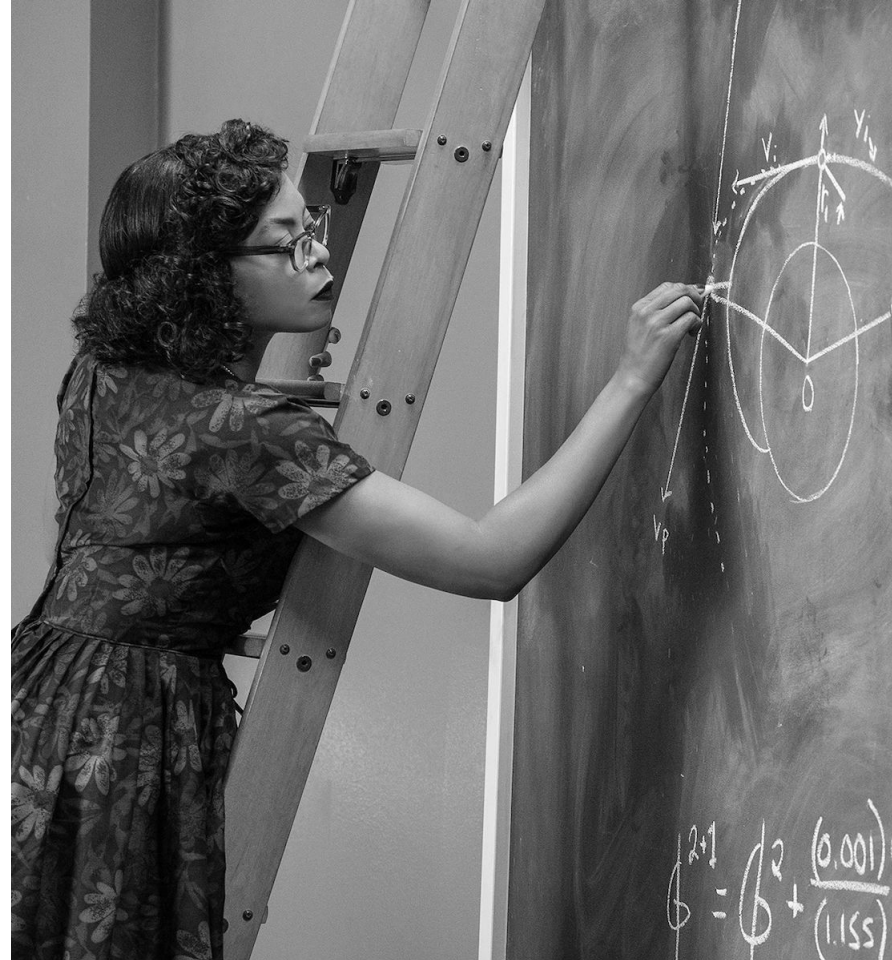ACV **$20,000**

(x) Opportunity Win Rate **20%**

(x) Meeting to Opportunity Conversion **50%**

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

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

Size of the Last Mile Problem

Qualified Leads	2000
(-) Disco Meetings	80 (4% conversion)
(x) VPM	$2,000

$3,840,000* (Available pipeline)

Revenue lost from Leads that don't convert to meetings

Every 1% increase in conversion rate, you pick up:
- 20 discovery calls
- $200K in pipeline
- $40K in revenue

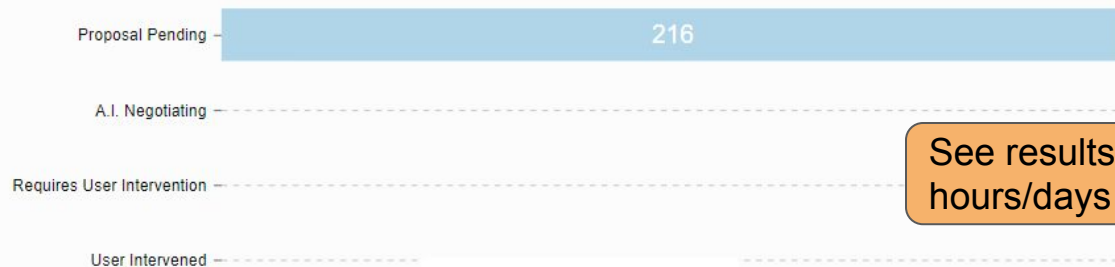KIONOLOGIC

MODERN SALES PROS
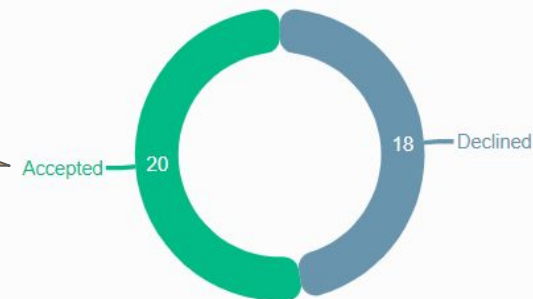
Meeting-based Dashboard

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Scheduling: 216

Proposal Pending	216
A.I. Negotiating	
Requires User Intervention	
User Intervened	

0   20   40   140   160   180   200

Final: 38

Accepted 20   18 Declined

See results in hours/days

Mon 4/26

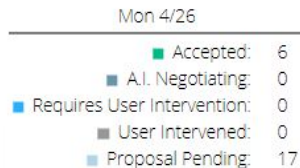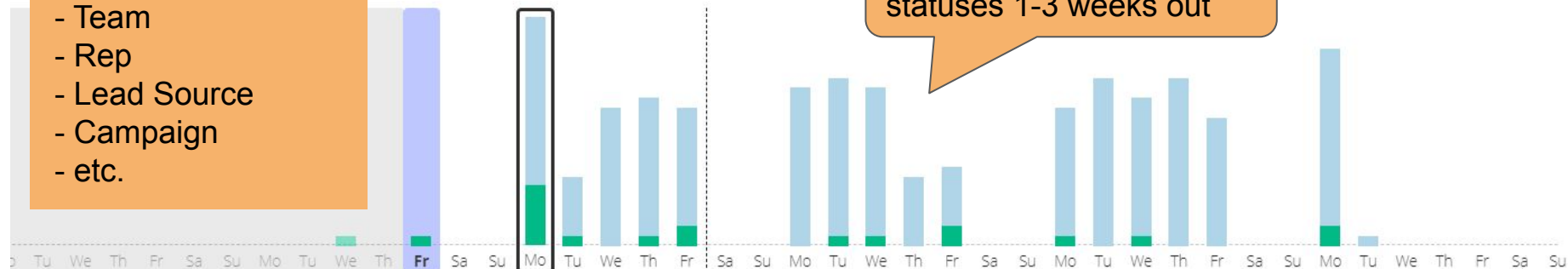|	
Accepted:	6
A.I. Negotiating:	0
Requires User Intervention:	0
User Intervened:	0
Proposal Pending:	17

Meeting metrics can be broken down by:
- Team
- Rep
- Lead Source
- Campaign
- etc.

See how many meeting statuses 1-3 weeks out

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So Now What?

How do we align better?

How do we forecast better?

Forecasting Benefits of the Meeting Metric

Role	Benefits
Marketing	No longer defending the ebbs and flows of lead volume
	Can adjust campaign Lead/MQL volume based on meeting proposed and accepted
SDR/BDR	No more questioning if you are producing "Movement without Work"
	Can see 1-3 weeks ahead of time if there will be enough pipeline
	Can adjust the booking of meetings to align with EOM AE crunches
Sales	SLA hand off between SDR and AE - tracking deal requirements
	Knows if they need to start self-sourcing deals 1-3 ahead of time
	Offset AE and SDR quarters: SDR last month is AE first month

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Best Leading Indicator - THE MEETING

Leading Indicator (Not Lagging for Top of Funnel - 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 experts - **Your Buyers**
- Highest intent signal - all sales' activity is to drive meetings in the first place

Technology has centered around the Meeting
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Secondary Insights:
- Segment by: Lead Source, Rep/Team, Prospect Persona, Product, Industry, etc.
- Are deals multi-threaded?

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Key Takeaways

Calendar Monetization™

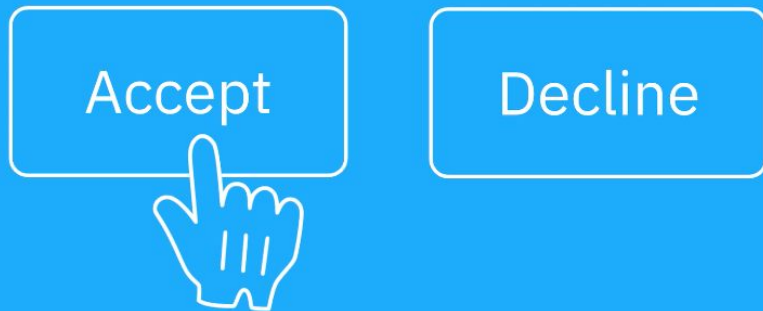**Use The Meeting as your central Marketing to Sales Dev metric**
- Track it in your CRM
- Report on with all your reps and teams
- Reporting dashboard looking 3 weeks out

Calculate your Value per Meeting

Increase lead conversion with a Calendar 1st™ approach
- Send contextual, tailored, and timely