# Sales vs. Customer Tech Stacks:

## Why they should be different

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# Today's Speakers

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VP, Marketing

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Customer Marketing

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# Address the Full Funnel as a Team - Customer Journey



Sales Funnel

- Awareness
- Consideration
- Decision
- Purchase

Customer Funnel

- Adoption
- Retention
- Expansion
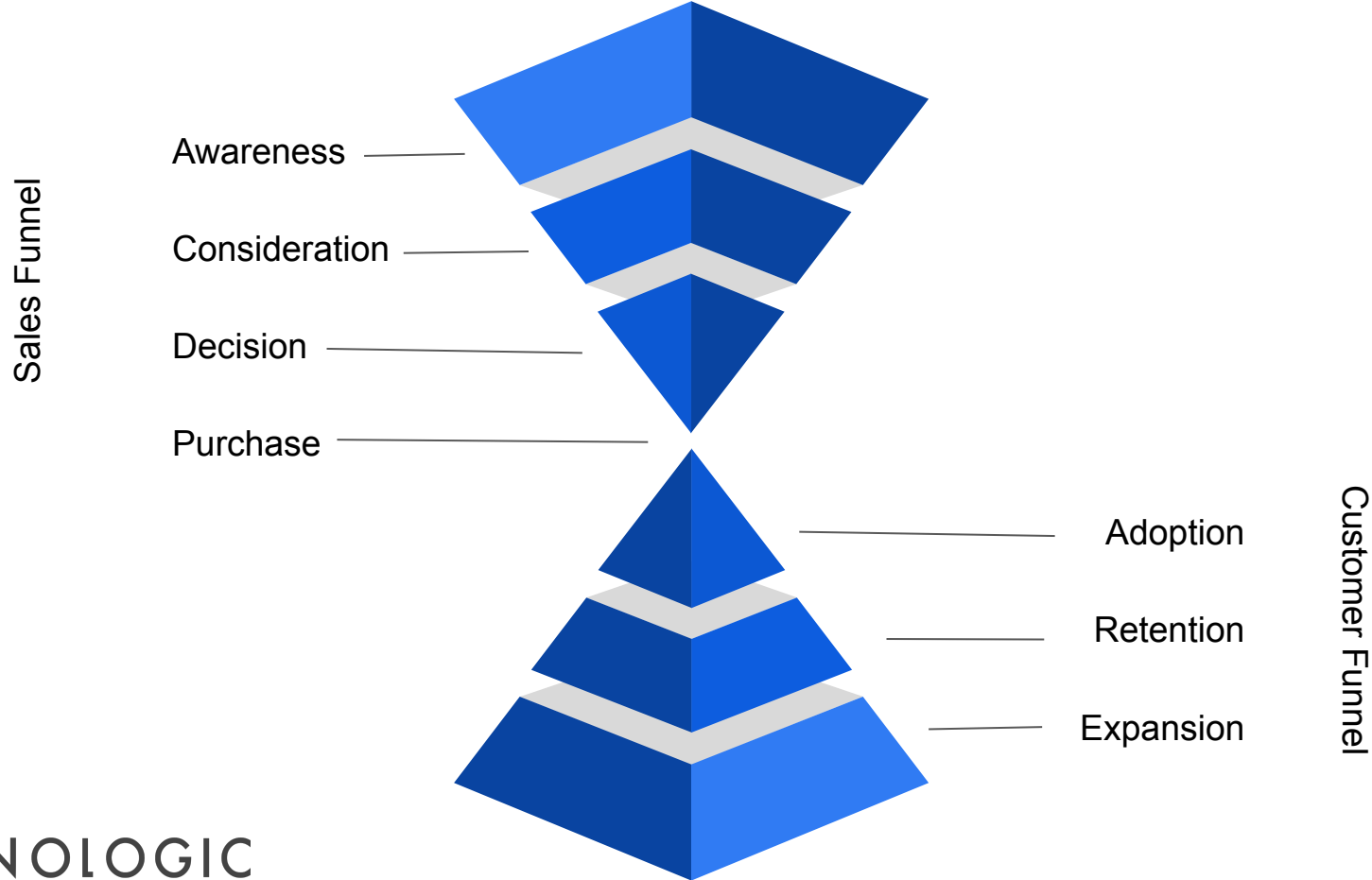
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# Kronologic Prescription Matrix

HOT · WARM · COLD

| CUSTOMERS | HAND-RAISERS | MARKETING LEADS | INTENT LEADS | ICE COLD |
|-----------|--------------|-----------------|--------------|----------|
| Cross-Sell / Upsell | Trial Conversions | Event Follow-Up | Kronologic Intent Campaigns | |

**PRIORITY PRESCRIPTION**

- - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - -

**SECONDARY PRESCRIPTION**

| CUSTOMERS | HAND-RAISERS | MARKETING LEADS | INTENT LEADS |
|-----------|--------------|-----------------|--------------|
| QBR's | PQL | Content Leads | Old Leads |
| Renewals | Demo Requests | Email Leads | No-Show Leads |
| Onboarding | | Chat Incompletes | |

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# Everyone has Revenue-focused Meetings
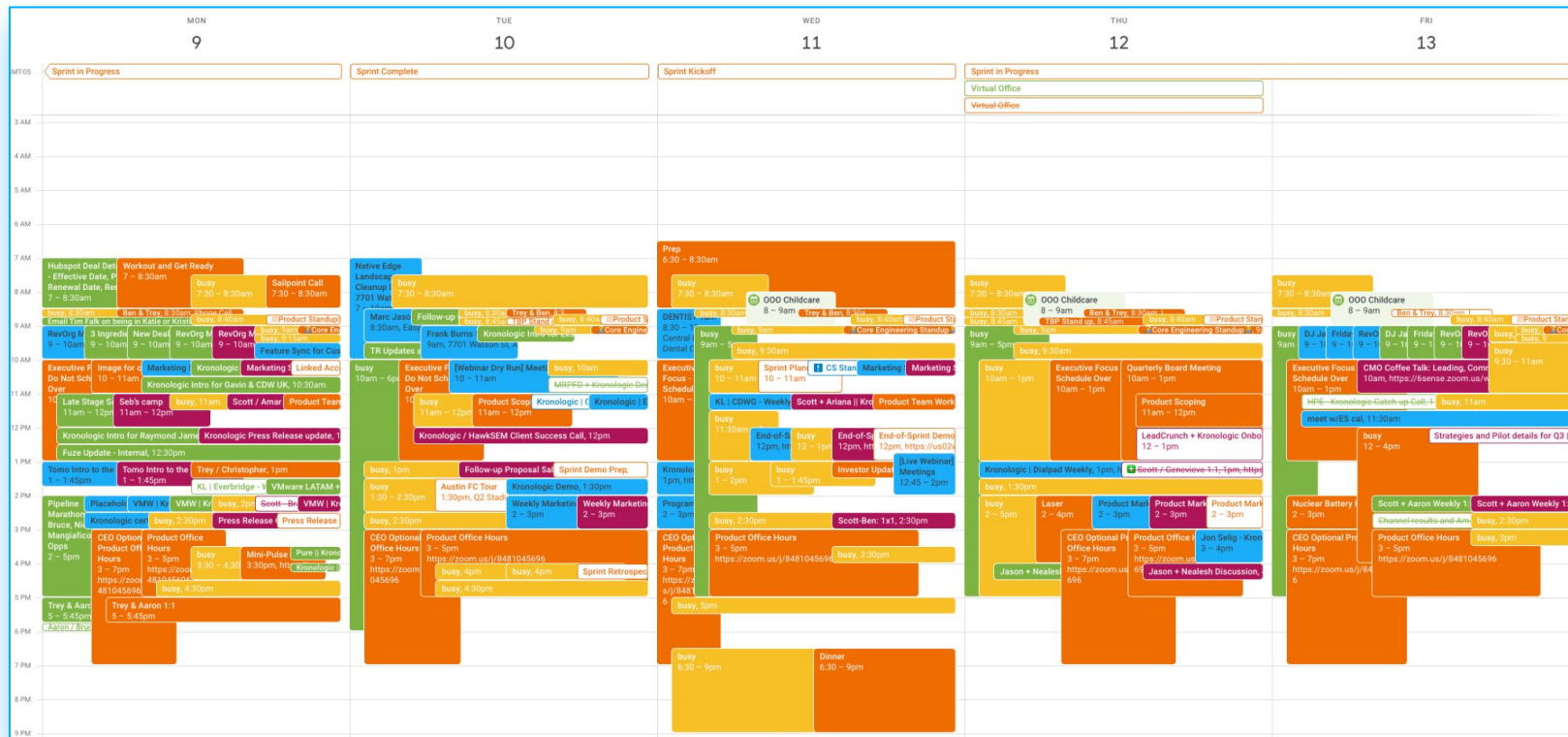
# Customer Revenue is Everywhere - Revenue Triggers

| Revenue Source | Trigger | Action Owner |
|---|---|---|
| **QBR** | EOQ date stamps | CSM |
| **New Product Offering** | Align with product launch | CSM / Marketing |
| **Merger / Acquisition** | Align with merger announcement timeline | Sales / Marketing |
| **Product Upgrade Notification** | Platform access requests via email, slack, intercom, etc. | CSM |
| **Cross Dept Selling** | Outline customer hierarchy to find new champions | Sales |

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# Align on Revenue

- **What does that mean?**
  - **Marketing, Sales and Customer Success Train and Learn together**
    - Provide a high quality experience and delivery of value
    - Relevant, long-term solutions to customer needs
    - Two way relationship with customer (wins, setbacks, R+D)

- **How do you do it?**
  - Targeting
  - Messaging
  - Prospecting
  - Feedback
  - Metrics

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# Sales and Customer Success:

Where they differ and why it matters to revenue

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# The People and Personas Are Different

|  | **Sales** | **CS / CSM** |
|---|---|---|
| **Leading KPIs** | Pipeline | CSAT / NPS |
| **Primary KPI** | Revenue | Retention |
| **Primary Activity** | Prospecting | Addressing customer needs |
| **Primary Persona Traits** | Assertive, Negotiation, Competitive | Empathy, Collaborative, Operational, Data Driven |
| **Secondary Responsibility** | Successful Onboarding | Cross/Up selling |

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# Sales vs. CS/CSM Standard Workflows - Status quo

## Sales

**Challenge: Customer expansion focus is not always a given**

| Book Discovery Calls | Add Value | Negotiation | Paperwork |
|---|---|---|---|

Finding and targeting new prospects and holding discovery meeting

Understand the business and provide valuable solution

Create an environment of adopting business change

Managing the legalities of the purchasing paperwork

## CS / CSM

**Challenge: Customer expansion focus is not always a given**

| Onboarding | Align with Customer Goals | Manage Projects and Challenges | QBR |
|---|---|---|---|

Finding and targeting new prospects and holding discovery meeting

Understand the business and provide valuable solution

Create an environment of adopting business change

Managing the legalities of the purchasing paperwork

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# Customer Revenue Dilemma - Who should drive?

## Sales

| Ability to Identify Post-sale Conversations | Provided Sales Training | Provided Sales Tools |
|---|---|---|

Access and awareness of customer conversations is limited - done after the contract is signed

From day 1 and continuing, they receive training to understand sales cycle

They are provided tools to make sure sellers are efficient and more effective

## CS / CSM

| Ability to Identify Post-sale Conversations | Provided Sales Training | Provided Sales Tools |
|---|---|---|

Limited understanding of how to identify sales opportunities and knowing what to do

Product focused training, not a sales background, no/little sales compensation

They use product and services focused tools, not designed to sell efficiency

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**Legend: Set for Success | Challenge**

# Lean into the Tech Stack:

Find and close expansion revenue faster

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# CS/CSM Tech Stack is Missing Engagement Tools
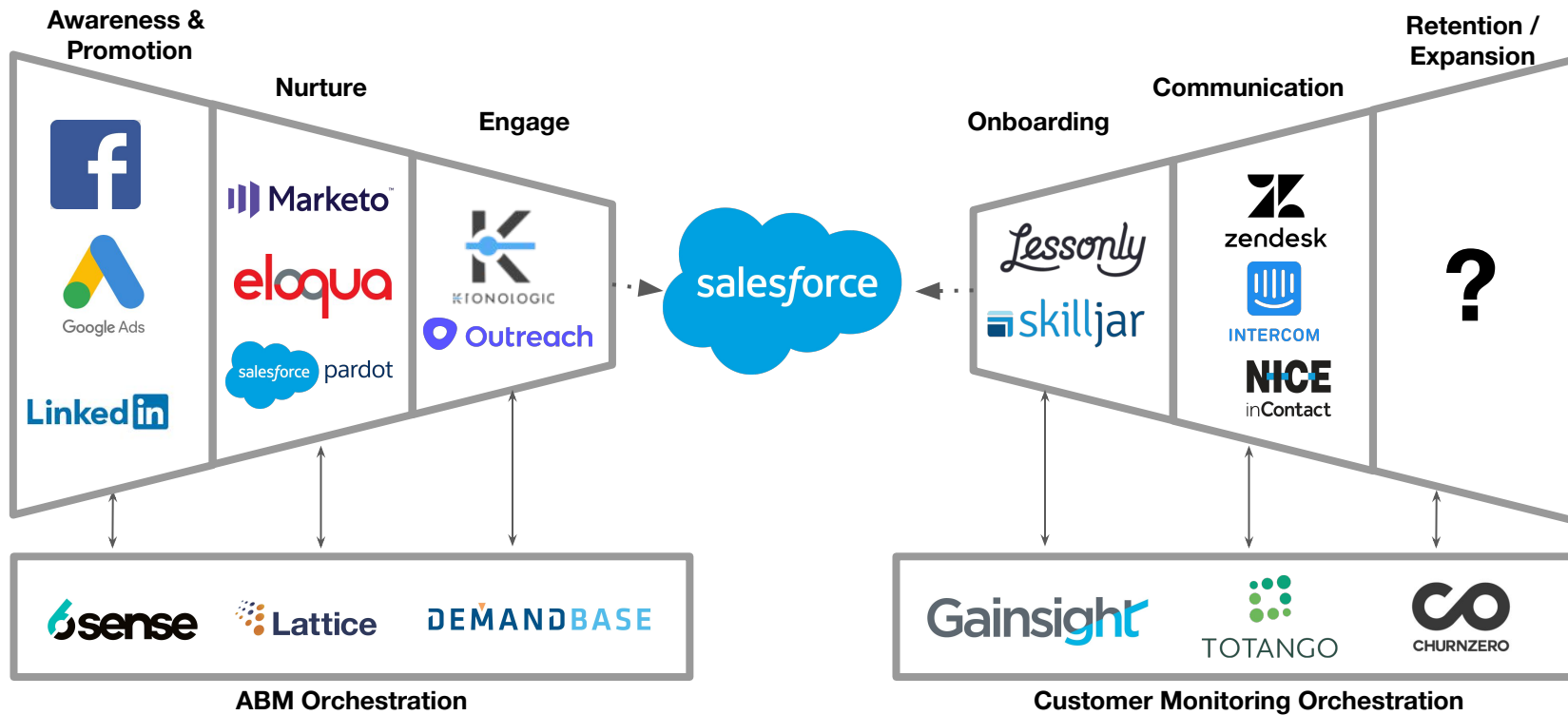
# Today's Lead/Customer Engagement is Too Manual
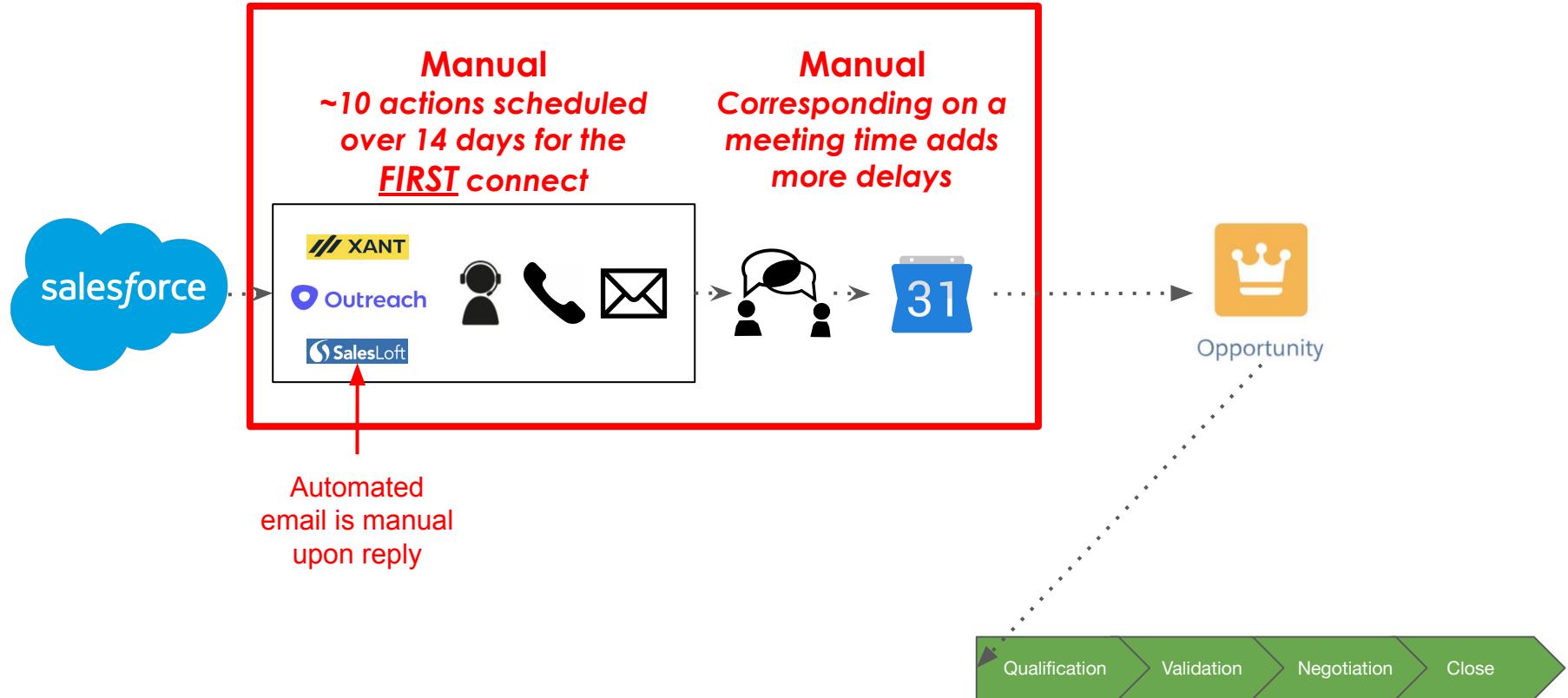
## Calendar 1st™

*/Calendar 1st™ / Calendar First™/*
*Noun*

1. The automated sending of calendar meeting invites at scale, using AI-based time negotiation, to book revenue focused meetings with no human intervention.
2. Can be done manually, but without scale

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# CS/CMS Triggers for Calendar First™

Account Expansion Targets

In-product triggers
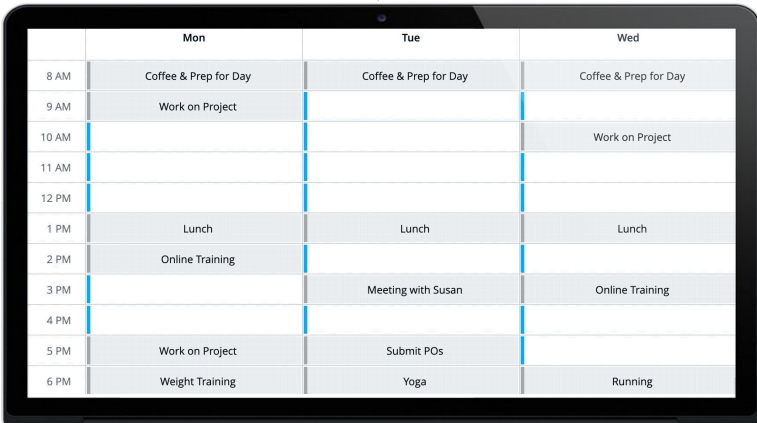
Cross Dept Selling

Merger / Acquisition

New Product

QBR

salesforce | CRM or CSV | HubSpot

KRONOLOGIC **Or Calendar First™**

| | Mon | Tue | Wed |
|---|---|---|---|
| 8 AM | Coffee & Prep for Day | Coffee & Prep for Day | Coffee & Prep for Day |
| 9 AM | Work on Project | | |
| 10 AM | | | Work on Project |
| 11 AM | | | |
| 12 PM | | | |
| 1 PM | Lunch | Lunch | Lunch |
| 2 PM | Online Training | | |
| 3 PM | | Meeting with Susan | Online Training |
| 4 PM | | | |
| 5 PM | Work on Project | Submit POs | |
| 6 PM | Weight Training | Yoga | Running |

# Calendar First™ in Action

### 5000+ employee, IT Services Company

| | | |
|---|---|---|
| Large Team | 200 reps Inside sellers | **800 meetings in 1 week** |
| Small Team | 6 reps Field sellers | **150 meetings in 1 month** |

Link to 800 meetings quote: https://hello.chorus.ai/listen?guid=e550b11b6ea048c2813ea9c6a4206c9f
Link to full case study webinar: https://vimeo.com/546216539

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We believe the best kind of sales tech fills up your calendar, not your to-do list.

Calendar 1st™ Methodology: **https://www.kronologic.ai/calendarfirst**

Experience for Yourself: **https://www.kronologic.ai/demo**

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