

SALES SUCCESS:

**A Workshop on Hiring,
Structuring, and Leading
Teams without YOU!**

**≈\$120,000 overspend
due to not knowing
this information**

Who am I?



- I'm a husband & father of 3 kids
- I'm a commercial pilot & flight instructor (shows I'm cool)
- Own and Run Rotate Digital for the last 5 years and grown it to over 35 team members
- We currently help over 150 moving companies grow their business leveraging Google and their online assets



Who am I?



- 2019: \$250k
- 2020: \$500k
- 2021: \$1.2mil
- 2022: \$2.2mil
- 2023: \$2.6 mil
- 2024 \$3.4mil

\$303,307

MRR

=

\$0

+

\$0

+

\$4,885

+

\$302,620

-

\$0

-

\$4,198

NEW

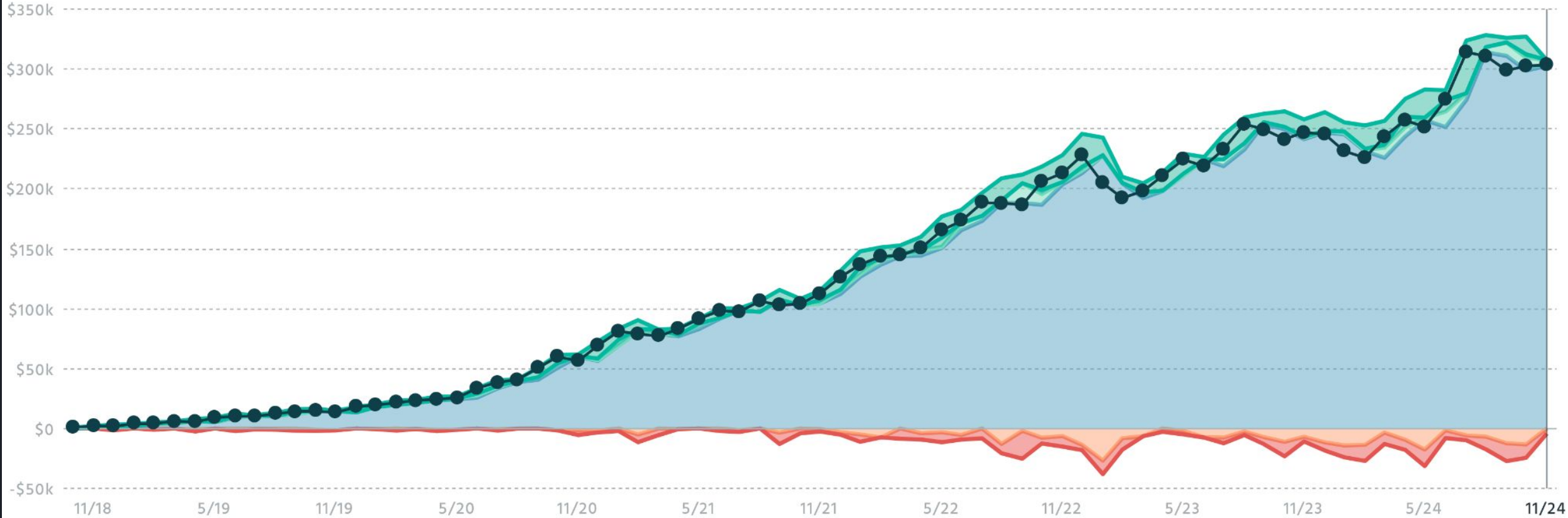
REACTIVATIONS

UPGRADES

EXISTING

DOWNGRADES

CHURN



Who am I?



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- 2020: \$500k
- 2021: \$1.2mil
- 2022: \$2.2mil
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- 2024 \$3.4mil

AND it's freakin' hard. But you can bypass some "wasteful" time and energy with what I'll go through today

WHERE **ARE WE** GOING TODAY?

- 1 IMPORTANCE OF SALES AND LEVERAGE (OUTCOMES)**
- 2 FINDING YOUR NEXT SALES PERSON**
- 3 FINANCIALLY INCENTIVIZING SALES WITHOUT GOING BROKE**
- 4 CADENCE OF MANAGING SALES TEAM/PERSON**
- 5 FACTORS OF SUCCESS FOR YOUR SALES**
- 6 SHARING WISDOM OF EXPERIENCE**

Why you should hire a salesperson for your agency?

Leverage

LEVERAGE **AND** OUTCOMES

- Your goal as owner or CEO of your company is to accelerate your company value
- There will be a time in your companies life when you selling will be the bottleneck and you'll need to hire out sales for continued leverage
- A salesperson creates a consistent sales pipeline and predictable revenue. They are solely focused on sales. News alert, you CANNOT do this, but they can
- Salespeople often bring skills that you don't have; starting with time. By hiring this person, you'll win more deals and close faster which increase the value of your business and money into your pocket.
 - ◆ My previous 5 months before a sales person: \$5,700 in MRR
 - ◆ Next 5 months after a sales person: \$13,580 in MRR
 - ◆ In fact, over the next 12 months, I average a 160% increase in YoY sales

A	B	C
	2021	2022
Jan	\$9,000.00	\$12,000.00
Feb	\$4,800.00	\$11,200.00
Mar	\$0.00	\$3,500.00
Apr	\$7,500.00	\$15,500.00
May	\$10,700.00	\$17,550.00
Jun	\$6,000.00	\$6,250.00
Jul	\$3,500.00	\$21,700.00
Aug	\$7,500.00	\$18,500.00
Sep	\$6,000.00	\$10,250.00
Oct	\$5,500.00	\$26,500.00
Nov	\$11,700.00	\$30,000.00
Dec	\$17,500.00	\$32,500.00
	\$89,700	\$205,450



A successful sales person is your critical lynchpin for success

LEVERAGE **AND** OUTCOMES

Why this salesperson is so important

- Sales generates MRR which compounds over time. Compounding money over time = more money to solve more problems.
- You start in negative territory on a sales call. Not neutral territory.
- Marketing agency partnership with companies is NOT purely numbers and data
 - ◆ It's relationships- human to human interaction.
 - ◆ So you have to leverage relationships and build trust (not simple FYI)
- Sales people represent your brand and trust. Critical for success and goodwill in the industry.

!! You can let this person go and continue to win

LEVERAGE **AND** OUTCOMES

Outcomes of a Sales Person

Outcomes are tangible and measurable items that are core to your role and cultivate the value that we pay for you to create. These are core outcomes that allows you to know if you are winning in your role.

⚠ Must be objective and trackable ⚠

LEVERAGE **AND** OUTCOMES

Outcomes of a Sales Person

- 1. Newly Added MRR (Sales)*
- 2. Sell the Right Clients & Expectations*

Finding Your Next Sales Person

**Who has put out a job, had
tons of candidates and then
thought...how do I know
who is best?**

HIRING SYSTEM TO GET THE **BEST**

TALENT

→ Saves you time

- ◆ Eliminates all the crappy people who would 1 click apply on LinkedIn
- ◆ Eliminates all the crappy people who don't qualify
- You'll get ton of applications– but you'll only look at the more qualified people
- You'll know the top 15 talent pool with 30 min of filtering, not 30 hours
- You don't waste energy on interviews that no show OR you find out within 2 min are not going to be hired but you are “stuck” on a call
- Your interviews will be more around capabilities and less around “feeling” and “standard responses”
- Creates a repeatable system once you establish it
- Hiring accuracy is improved drastically
- Reduces stress in decision making

FINDING **YOUR** NEXT SALES TALENT

Hiring Process:

1. Create Job Description that sets expectations and clarity
2. Post and get leads of candidates in your pipeline
3. Filter process that weeds out lame people
4. Top candidates get a interview project (paid or unpaid)
5. Project results weed out more people
6. Face to face interview to confirm and find the best sales talent to hire

FINDING **YOUR** NEXT SALES TALENT

Create Job Description that sets expectations

1. About the Company
2. About the Role (Think day in the life)
 - ◆ How much inbound vs outbound?
 - ◆ Typical culture
3. Outcomes of the role
4. Capabilities they need to have
5. Duties required in the position
6. **Compensation** *(we will dive deeper into this later)*
7. How to apply

About the Role

The Sales Account Executive (AE) will focus on prospecting, generating leads, building relationships, and building and selling SEO/PPC services to meet a clients need. Utilizing powerful discovery techniques, creating urgency in sales calls, and managing the sales pipeline through HubSpot are critical to success in this role.

You will be reporting to the President of the company and be working hand in hand as a team with our sales development rep to **find and cultivate relationships then sell our packages or custom marketing services to prospective clients. You'll be selling a combination of set SEO/PPC packages along with crafting custom packages for others.**

Currently, sales are 40% inbound, 60% outbound.

If you want a job that is rewarding for your hard work and where you can make a ton of money with uncapped commissions then continue reading.

Outcomes You Are Responsible For

Outcomes are tangible and measurable items that are core to your role and cultivate the value that we pay for you to create. These are core outcomes that allows you to know if you are winning in your role.

1. **Newly added MRR:** You'll be responsible for selling our services to new prospects and achieving newly added MRR targets according to our plan.
2. **Selling The "Right" Clients:** You will need to have a 95% success rate of selling the right clients that align with our ICP. Tracked within the first 3 months of a sale.

Capabilities

These are the capabilities that we believe you need to excel at in order to succeed in this role and achieve the valuable outcomes we need you to create in the role.

- **Building Relationships:** You'll need to know how to build relationships with business owners and strategic partnerships to build your pipeline.
- **Prospecting:** Be able to leverage various prospecting methods to build relationships and deal pipeline; including networking, cold calling, gifting, and digital outreach.
- **Cultivate an Exceptional Sales Experience:** You will need to be able to create value for all prospects and meetings. Their experience with you represents the brand of the company.
- **SEO & PPC Application:** You need to have a solid understanding of SEO, PPC, and other digital marketing strategies. (We can train you if you don't have this)
- **Collaborative:** Work collaboratively across all teams; especially fulfillment and marketing in order to identify needs of clients and craft and communicate the solutions to the prospect.
- **Expectation Setting:** Leverage clear communication with the client to define clear action items and outcomes and then set clear expectations of the Rotate Digital process.
- **Complex to Simple:** Have the ability to convey complex concepts clearly to provide value to the prospect
- **CRM:** You'll need to be able to use Hubspot and be able to leverage it
- **Solutions Focused:** Strong decision-making skills; ability to identify client needs and provide effective solutions.

Duties & Responsibilities

These are some of the core activities/tasks to be performed daily, weekly, monthly, and/or quarterly that you will have on your plate. This is not an exhaustive list.

- Submit weekly and monthly check-ins.
- Update sales KPI's weekly/monthly
- Log all communication, actions, and milestones within HubSpot.
- Customize presentations and proposals based on discovery & findings.
- Stay up to date on industry trends and pulses through various content
- Travel for conferences when needed

Compensation

| *We pay you for the value you have and create at Rotate Digital.*

Pay range is dependent on experience.

Base: \$60,000 - \$80,000 (in USD) depending on experience

OTE: \$130,000 to \$175,000 (in USD)

***This is uncapped commission potential** - typical OTE of \$130k-\$175k, but there is no cap and you can make as much as you can sell.

How to Apply

Do you feel like you would love this role and excel in creating extreme value by being in this position? If so here is how to apply:

- Use the link below to apply for the role
- You'll hear from us if we want to move forward in the application process
- Any questions, just reach out.



[Apply Now](#)

The Process of Finding Your Next Sales Person



Create Job Description that sets expectations and clarity



Post and get leads of candidates in your pipeline



Filter process that weeds out lame people



Top candidates get a interview project (paid or unpaid)



Project results weeds out more people



Face to face interview to confirm and find the best sales talent to hire

FINDING **YOUR** NEXT SALES TALENT

Post and get leads of candidates in your pipeline:

1. Referrals:

- ◆ I like this a lot if you have team members that are from other agencies
- ◆ I found my most recent sales person from this source

2. LinkedIn

- ◆ Huge candidate base for lots of talent!
- ◆ I found my last VP of Sales from LinkedIn

★ I recommend LinkedIn overall because your network usually is like you and you limit the talent out there that belong and want a company like yours.

FINDING **YOUR** NEXT SALES TALENT

Application process that weeds out lame people

Factors you are testing for in this process

1. **Confident to sell without a proven process given to them (although you need to have one)** [interview questions]
2. **Fit the culture** [application process]
3. **Drive to follow up on leads (want to see them do this in the application process)** [follow up in the interview process]
4. **They have experience in digital marketing sales (pay for the experience, it's worth it!)** [in the application + resume]
5. **They don't lie** [hard to tell but usually when they talk about weakness or hard times]
6. **They listen/curious people** [they have multiple questions from the project/and or face to face interview]
7. **Money is the driving factor but not the only factor** [the actual interview]

FINDING **YOUR** NEXT SALES TALENT

The Application Questions

1 → Before we start, let's get some contact information from you*

First name *

Jane



Last name *

Smith

Phone number *



(201) 555-0123

Email *

name@example.com

OK

press Enter ↵

FINDING **YOUR** NEXT SALES TALENT

We warned you.

2 → Have you read the job description and believe you are a fit for this role?*

 Y Yes N No

FINDING **YOUR** NEXT SALES TALENT

Expectation Setting

3 → If we decide to move you forward in this application process, there will be a small project (1-2 hours) to submit to us for the final interview. Are you willing and able to complete the project if given the opportunity?*

Y Yes

N No

OK

FINDING **YOUR** NEXT SALES TALENT

Expectation Setting

4 → This is a full time role, our typical work week is 40-45 hours a week. You'll be working in a time zone to accomodate prospects in all USA time zones. Is this something you are willing and able to do?*

We have clients all over the USA timezones. You will need to be flexible in order to accomodate your clients and their time zone.

 Y Yes N No

FINDING **YOUR** NEXT SALES TALENT

Expectation Setting

- 5 → Are you willing to work for a small, profitable, startup company (~30 people) and win together achieve outcomes?*

Rotate Digital is a small & profitable. We work hard, we focus on achieving outcomes and we celebrate wins. That being said, it means sometimes we have to wear multiple hats and step outside "our specific job responsibilities." You have to be willing to be apart of a humble and winning culture where we win as a team.

Yes

No

OK

FINDING **YOUR** NEXT SALES TALENT

Logistical question

7 → What country do you live in?*

Type or select an option



FINDING **YOUR** NEXT SALES TALENT

Normally, I like people employed

8 → Are you currently employed?*

A Yes

B No, I'm in between jobs

OK

FINDING **YOUR** NEXT SALES TALENT

Bait question. They feel confident to answer honestly

9 → As of today, do you have experience in selling marketing services like SEO, PPC, and websites?*

Keep in mind this is **not** a requirement in order to join our sales team.

A Yes

B No

OK

FINDING **YOUR** NEXT SALES TALENT

The Application Questions

10 → If you we decide to hire you, how soon could you start full time with us?*

A Immediately

B Within 2 weeks

C Within a month

D More than a month

OK

FINDING **YOUR** NEXT SALES TALENT

We want to see average of 3+

11 → Please rate yourself on your **current** ability to communicate the value & application of aspect of digital marketing.*

0 being no experience at all

1 very little experience, would not do well on a sales call today about this topic

2 being that you would be able to get through a call with a prospect (not confidently though) but if they ask further questions you would not have most answers

3 you could communicate well on a client call today and have a base knowledge of the topic for prospect questions

4 meaning you are very confident in communicating about this topic and have solid knowledge about this topic, can answer most further prospect questions about the topic

5 being that you are are "4" and could train someone how to communicate about this topic to clients

	0	1	2	3	4	5
SEO	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Local Map SEO	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Websites & Branding	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Google Business Profile	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Google Ads / PPC	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

OK

FINDING **YOUR** NEXT SALES TALENT

Type of Training They will Need

12 → Please rate yourself on your **current** experience with any of these softwares.*

0 = never used this before

1 = I've used this before and have surface level knowledge on it

2 = I've used this before, I'm very confident in it. I have vast knowledge on it.

3 = I've used this before, I'm confident on it so much so that I could train someone how to use and leverage this

	0	1	2	3
Hubspot	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Asana	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
SEMRush or Ahrefs	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Google Analytics	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Local Falcon or similar GBP map ranking software	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Google Slides	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Google Sheets	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Google Doc	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

OK

FINDING **YOUR** NEXT SALES TALENT

Culture fit

13 → In a Loom video, in 2 min or less, tell us why you think you'd be the best sales person for us to hire*

You can use another video option if you don't want to use Loom, but needs to be submitted with a link for us to view it.

https://

OK

press Enter ↵

FINDING **YOUR** NEXT SALES TALENT

Did they put effort into this?

14 → If you had to drum up your own leads from scratch, how would you start? Knowing our industry (Moving businesses) where would you start, how would you go about this, and how can you keep this outreach intentional?*

Keep your answer short and concise

Type your answer here...

Shift ⬆ + Enter ↵ to make a line break



press Enter ↵

FINDING **YOUR** NEXT SALES TALENT

Can they sell? follow directions and did they look you up online?

15 → In a Loom video, in 2 min or less, pretend I'm a moving business owner and share with me why I should use Rotate Digital for SEO marketing?

*

You can use another video option if you don't want to use Loom, but needs to be submitted with a link for us to view it.

<https://>

OK

press Enter ↵

FINDING **YOUR** NEXT SALES TALENT

The Application Questions

16 → [Optional] Upload your resume for us to review

Upload the resume **only** as a PDF

17 → [Optional] Please share your LinkedIn profile or another relevant link to review about you.

This is optional

https://

Submit

press **Cmd** ⌘ + **Enter** ↵

FINDING **YOUR** NEXT SALES TALENT

Who is qualified?

1. They have a top percentile of score
2. Their loom videos follow the process (not over 2 min, good english, good answers on the sales loom application)
3. They say yes to experience in digital sales AND resume/linkedin backs it up

🤔 Travis, that doesn't seem to be a lot. Yup...

FINDING **YOUR** NEXT SALES TALENT

Interview Project [process]:

- 1. Now you have probably 15 or less qualified**
- 2. Send them an email about how this is out of the ordinary but you've got experience in the last years of hiring to say a project gives the right person the ability to shine and have a more valuable interview**
- 3. Wait for project submissions to come back!**
 - ◆ **People will get to this stage, get the project and not fill it out**
 - ◆ **Others will fill it out and it will be clear you don't want to move forward**
 - ◆ **And then you'll find yourself with 1-3 final candidates for the interview**

FINDING **YOUR** NEXT SALES TALENT

Interview Project [purpose]:

1. People can interview well - but the project allows the right person to shine
2. The project must test for something specific to your business
 - ◆ easy way to think through it is what are the problems you've had in your business recently
 - ◆ allows them to showcase their skills
3. Project can be paid or unpaid
 - ◆ I like paid because if you have real problems, they can solve them for you in the interview without hiring them and the project can come back with better results
 - ◆ unpaid is nice to just move forward and add hedge of protection
4. Remember: the interview project is to help you find the right person. Sometime the best person won't need this to shine.

FINDING **YOUR** NEXT SALES TALENT

Interview Project [example]:

Do they know intuitively where they can win?
I'm looking for honey pots or CRM leads



I want to know if they could pivot the "issues"
to talking about the future and end goals.



Current need in our company is bigger
accounts. This was a real situation. I wanted
to see what they would do.



Sales Account Executive Hiring Project

Hi applicant! Thanks for taking the time to apply. Below we have three action items we would like you to handle. You should have all the information you need to complete them. If you have any questions, confusions, or need more info/help please don't hesitate to reach out to us via the person you have been in contact on our team. They can help clarify anything.

Game Planning

Write up a 1 page or less plan on how you would build up your prospects to hit your goals. Think about the core activities. Who would you target? Where would you find them? What is the low hanging fruit?

Situations

1. You've completed a discovery and you've seen that this client is a good fit. The company makes the right money, they have good GBP reviews, and a website. It's time in the sales call to share what we can do and what opportunities they have in his business. But they get interrupted and says he is "so sorry" and needs to take this and run. He asks you to make a quick loom video sharing what opportunities he has and how Rotate Digital can help. **Please take this [SEO audit and information](#) to craft a 5-7 min loom video of the opportunities and ways that Rotate Digital can help.**
2. We've been working with 1 location from 2 Fellas Moving Company Phoenix and have seen extraordinary results in their ranking and sales! This is all happening without access to their main location. How would you go about getting in touch with corporate and getting them on a call to work with Rotate Digital?

Respond with your solution documents and video link via email to travis@rotatedigital.com with garrett@rotatedigital.com on CC.

FINDING **YOUR** NEXT SALES TALENT

The Actual Interview

1. Small Talk → can they small talk and be normal? Do they laugh?
2. Questions to ask them
 - ◆ Tell me about the project. What was hard? good? Do you have questions?
 - ◆ what happens if this doesn't go well according to your plan?
 - ◆ how do you figure out your highest leverage activity in the first 30 days?
 - ◆ how do you balance education on a sales call without losing sales urgency?
 - ◆ when do you tell someone “no” to not signing up with Rotate Digital?
 - ◆ Bring up some of the current objections that you hear and ask how they would handle it?
 - ◆ What was easy and hard on the Slattery Project?
3. Role Play
4. Questions They have for you

FINDING **YOUR** NEXT SALES TALENT

The Actual Interview

1. Small Talk
2. Questions to ask them
3. Role Play
 - ◆ give them a scenario — I like having a warm lead, who knows about the business because the deal was lost 6 months ago. what's their process before hand? Then do the role play.
4. Questions They have for you
 - ◆ They **MUST** have questions. If they say “You’ve answered everything pretty well” Then they are not curious or scared to ask

FINDING **YOUR** NEXT SALES TALENT

The Actual Interview | Part 2 | Expectation Setting

1. Showing them your planned OTE earnings

Sales Goals/Projections	Nov 2024	Dec 2024	Jan 2025	Feb 2025	Mar 2025	Apr 2025	May 2025	Jun 2025	Jul 2025	Aug 2025	Sep 2025	Oct 2025
Last Year New MRR	\$ 17,500.00	\$ 16,000.00	\$ 18,500.00	\$ 9,500.00	\$ 18,500.00	\$ 15,000.00	\$ 24,500.00	\$ 14,250.00	\$ 41,000.00	\$ 22,500.00	\$ 14,000.00	\$ 15,000.00
New MRR Goals	\$ 8,000.00	\$ 12,000.00	\$ 18,500.00	\$ 15,000.00	\$ 18,500.00	\$ 17,250.00	\$ 20,000.00	\$ 15,000.00	\$ 25,000.00	\$ 20,000.00	\$ 16,100.00	\$ 17,250.00
AE Base	\$ 7,500.00	\$ 7,500.00	\$ 7,500.00	\$ 7,500.00	\$ 7,500.00	\$ 7,500.00	\$ 7,500.00	\$ 7,500.00	\$ 7,500.00	\$ 7,500.00	\$ 7,500.00	\$ 7,500.00
Commission	\$ 1,650.00	\$ 3,050.00	\$ 5,999.99	\$ 4,249.99	\$ 5,999.99	\$ 5,374.99	\$ 6,749.99	\$ 4,249.99	\$ 9,249.99	\$ 6,749.99	\$ 4,799.99	\$ 5,374.99
AE OTE	\$ 153,499.90											
Commission With Last Year Numbers	Oct 2023	Nov 2023	Dec 2023	Jan 2024	Feb 2024	Mar 2024	Apr 2024	May 2024	Jun 2024	Jul 2024	Aug 2024	Sep 2024
New MRR	\$ 15,000.00	\$ 17,500.00	\$ 16,000.00	\$ 18,500.00	\$ 9,500.00	\$ 18,500.00	\$ 15,000.00	\$ 24,500.00	\$ 14,250.00	\$ 41,000.00	\$ 22,500.00	\$ 14,000.00
AE Base	\$ 7,500.00	\$ 7,500.00	\$ 7,500.00	\$ 7,500.00	\$ 7,500.00	\$ 7,500.00	\$ 7,500.00	\$ 7,500.00	\$ 7,500.00	\$ 7,500.00	\$ 7,500.00	\$ 7,500.00
Commission	\$ 4,249.99	\$ 5,499.99	\$ 4,749.99	\$ 5,999.99	\$ 2,100.00	\$ 5,999.99	\$ 4,249.99	\$ 8,999.99	\$ 3,950.00	\$ 18,849.99	\$ 7,999.99	\$ 3,850.00
AE OTE	\$ 166,499.91											

FINDING **YOUR** NEXT SALES TALENT

The Actual Interview | Part 2 | Expectation Setting

1. Showing them your planned OTE earnings
2. Setting Expectations with Historical Sales for them
3. Show them the sales flow in more detail of how it works
4. Make sure to share the bottom, target, and stretch goals

***this will bring up final questions and curiosity**

Incentivizing Your Sales Talent

**“A great commission plan
can’t save a bad sales
strategy.”**

INCENTIVIZING YOUR SALES TALENT

→ **Base Salary + Commissions = OTE**

→ **Base Salary:**

- ◆ **Must pay a base salary: Due to my believe that the sales role is important, I want someone mature, experienced, and strong on all fronts (personal, business, experience). These people cost money.**
- ◆ **Needs to be competitive to the market**
- ◆ **I find that \$50-\$80k/ year is a good place to be at. I lean on the \$65-\$80k a year person for better quality and higher standards**
- ◆ **The stronger your brand reputation in the industry, the less you may need to pay a sales rep because your brand already carries trust and credibility.**

INCENTIVIZING YOUR **SALES** TALENT

⚠ Sales are such a critical pillar of your business that it's worth investing in a high-quality salesperson. A good salesperson requires less oversight and training, allowing you to focus on other priorities instead of constantly managing or correcting their work. Paying for quality upfront saves you time, effort, and headaches down the road.

⚠ They represent your brand. A poor culture fit and someone sleazy will put a negative taste in someone's experience and you'll lose the opportunity. Take it from experience!



(908) 256-6259 10:52 PM

I spoke with Oscar from Rotate Digital, and he didn't give me the confidence to consider hiring them. I don't think he seemed very knowledgeable about their process, and he just wasn't quite as professional as I would've liked. \$2000 or thereabouts per month is a lot, especially if I don't know for sure if I'm going to get anything out of it. After I declined, he still followed up with me a few times which irritated me. Do you use them?

I'm not getting good vibes from this guy from the start as I mentioned to you yesterday. If I'm going to sign on with you guys it won't be thru him. Just giving you feedback, owner to owner.



Jenny Lariosa 10:24 AM

For Bronze right?

Okay I did let him know to work on his reviews in the meantime

He got the Oscar bad experience but now he's good to meet again soon

INCENTIVIZING YOUR **SALES** TALENT

→ Commissions:

- ◆ **MUST BE SCALABLE!!** (Share the story about Travis being an idiot)
- ◆ **Must fit in the business model (see above)**
- ◆ **No recurring commissions**
 - Super tedious to track
 - It's not their job to retain clients
 - Maybe only for a short period of time to pay for the person and pay more but I'd rather you do setup fees
- ◆ **3 month clawbacks for the win!**
 - Any client that leaves, or stops paying, or is deemed not a fit by our team, that commission is clawed back and subtracted
- ◆ **Track Commissions on a monthly sheet that THEY must submit**
 - You'll double check and verify because who trusts sales people? 🤔

INCENTIVIZING YOUR SALES TALENT

→ Example of commission tracking sheet

A	B	C	D	E	F	G	H	I	J
	May 2024	Jun 2024	Jul 2024	Aug 2024	Sep 2024	Oct 2024	Nov 2024	Dec 2024	
Commission Total	\$ 3,724.15	\$ 1,924.55	\$ 18,923.65	\$ 2,324.55	\$ -	\$ -	\$ -	\$ -	
Clawback balance			\$ (1,199.60)	\$ (2,100.00)	\$ -	\$ -	\$ -	\$ -	
Delayed Amount	\$ -	\$ -	\$ (6,900.00)	\$ 6,900.00	\$ -	\$ -	\$ -	\$ -	
Commission Paid	\$ 3,724.15	\$ 1,924.55	\$ 10,824.05	\$ 7,124.55					
Clawback Date	7/15/24	8/15		9/16					
Clawback Taken	8/15/24	9/15		9/16					
Notes	EPM Movers Downgrade Gold --> Bronze	Antz Movers Churned	Royal Mover contracts not signed. To be paid next month	Economical Movers downgrade Gold --> Bronze					

INCENTIVIZING YOUR SALES TALENT

A	B	C	D	E
Month MRR and Commission	Recalculated	Original value	Correction	Loom Video Explanation
MRR Sales	\$ 8,500.00			
Non MRR Sales	\$ -			
Commission	\$ 2,524.55	\$ 3,724.15	\$ (1,199.60)	
MRR Sales				
Growth	\$ 1,000.00	0		
Bronze	\$ 1,500.00	4	3	
Silver	\$ 2,500.00	1		
Silver Add On	\$ 1,750.00	0		
Gold	\$ 4,000.00	0	1	Downgrade to bronze
Gold Add On	\$ 2,500.00	0		
Bronze Upgrade from Growth (\$1000 → \$1500)	\$ 500.00	0		
Silver Upgrade from Bronze (\$1500 → \$2500)	\$ 1,000.00	0		
Gold Upgrade from Silver (\$2500 → \$4000)	\$ 1,500.00	0		
Gold Upgrade from Bronze (\$1500 → \$4000)	\$ 2,500.00	0		
Non MRR				
Smart Moving Integration (\$125)	\$ 50.00	0	\$ -	
Existing Client Template Website (\$1500)	10%	0	\$ -	
Existing Client Custom Website (\$2250)	10%	0	\$ -	
Non Client Template Website (\$2500)	10%	0	\$ -	
Non Client Custom Website (\$4500)	10%	0	\$ -	
			\$ -	
One Time Projects (>\$500) - Need approval from GT	15%	\$0	\$ -	
Client (with Hubspot Link) Package purchased DocuSign Link				
Anthony Jefferson	Bronze	2d-4f33-4c06-9453-025d5f5fa261		
Sergio Medrano	Silver	3-0c9a-450c-94de-3e8ed9a61279		
BRETT BEUTLER	Bronze	ce-ba84-4fae-8477-57e35b1698fd		
Hector Jimenez	Gold	1-a176-4b65-9875-c8ba81e02587		
Michael Cashman	Bronze	b-0aa2-4bbb-ba1d-6882a2bede90		
	N/A			
	N/A			

INCENTIVIZING YOUR SALES TALENT

→ Our current commission structure:

	A	B	C	D
	Total new MRR start	Total new MRR end	% Commission	
	\$0.00	\$4,999.99	15.00%	
	\$5,000.00	\$9,999.99	30.00%	
	\$10,000.00	\$14,999.99	40.00%	
	\$15,000.00	\$24,999.99	50.00%	
	\$25,000.00	\$100,000.00	60.00%	

INCENTIVIZING YOUR SALES TALENT

→ Sales Floor vs Sales Goal:

- ◆ Sales floor is the minimum amount of revenue (value) they must generate to even be on the team
 - Needs to be objective and clear
 - Do the calculations to know the minimum sales, including base pay, they must generate to be on the team
- ◆ Sales Goal is the goal you have in front of them to hit. They need to be hitting this number or growing towards it over time without dropping below the sales floor
- ◆ **!!** They need to know these numbers and know what it means to drop below this. Have that conversation with them and email them for clarity.

“I want to set clear expectations so we’re aligned from the start. This position requires generating a specific minimum level of new sales revenue each month to ensure it’s sustainable for the business. We’ve identified a bottom-line threshold, and if sales drop below that in even one month, we both need to agree upfront that it could result in parting ways, as the role would no longer be viable at that point.

My goal will always be to strategize and give another chance to correct course if possible, but this threshold is the absolute baseline we need to meet. I want to be transparent about this so there are no surprises, and we can both move forward with clarity and confidence. If you’re on board with these expectations, I’m excited to move forward with you.”

Training Bonuses

TRAINING **BONUS** FOR ONBOARDING

Training Project During Onboarding that creates great communication, clarity, and tests how careful they took this

→ Give 5 sales calls to review

◆ Have them fill out:

- What went well
- What didn't go well
- What can be improved
- Quality takeaway questions to use for future calls
- Questions they have for YOU to clear up and answer for them

Managing Sales Talent

MANAGING SALES TALENT

Must always know the most important metrics! Don't get caught up in fluff.

- Define the team's / individual MIN & Critical KPIs (north star metrics)
 - ◆ MIN = Most important number = New MRR
 - ◆ Critical KPIs:
 - Zoom Pitches
 - Close Ratio
 - 3 Month Retention
- Remember, hard work and effort doesn't pay the bills

MANAGING SALES TALENT

Core Cadence of Communication and Meetings

→ Daily

- ◆ Summary check-ins at the end of the day
- ◆ [optional] - stand up meeting to answer questions, set expectations and align on administrative items.

→ Weekly

- ◆ Summary check-ins at the end of the week
- ◆ Sales Meeting to continue to increase the value of the team

→ Monthly


- ◆ Review of the last month and focus on winning

MANAGING SALES TALENT

Daily

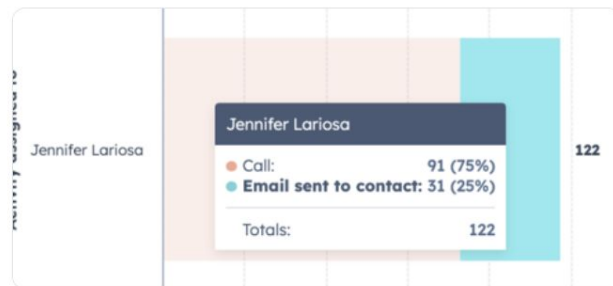
→ Summary Check-ins at the end of the day


- ◆ The metrics can change based on focus and clarity you need to know what is happening. These daily check-ins are for keeping pulse and setting pace.
- ◆ Usually around calls, meetings taken, rescheduled, deals created, zoom pitches
- ◆ **!! Don't get caught up in the daily metrics**

 **Jenny Lariosa** 4:17 PM
11/25 Update:

- 1 meeting, 1 reschedule, 1 no-show (working to reschedule)
- Many calls, but not too many connected on the phone
- Getting a lot of "not the right time" lately

Screenshot 2024-11-25 at 6.00.21 PM.png ▼

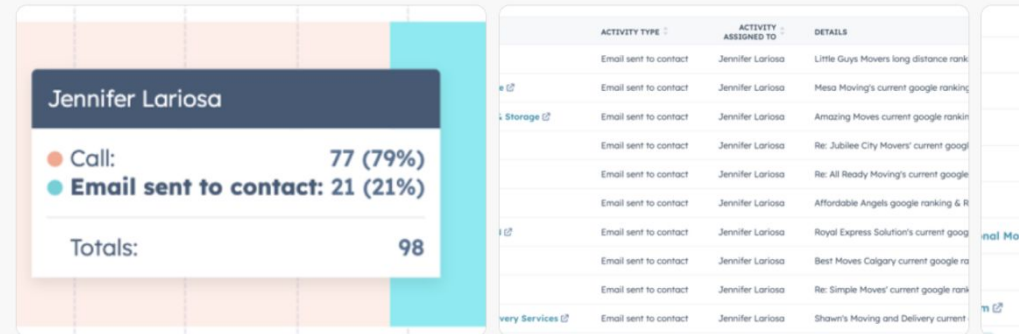


 **Travis Weathers** 5:02 PM
thanks! what is your response to "not the right time"

 **Jenny Lariosa** 4:08 PM
11/21 update

- Still no new meeting book, sorry guys I'm trying
- Had good conversations, but either low in budget, or not looking to meet until beginning of next year
- These two stood out to me today: Simple Moves <https://app.hubspot.com/contacts/20858168/record/https://app.hubspot.com/contacts/20858168/record/0-2/20102765100/view/1?engagement=65141>
- Emails without "RE:" are re-engagement emails

3 files ▼



MANAGING SALES TALENT

Weekly Sales Meeting

- Check-ins
- Last Week Summary
- MIN Update (Individual & Team)
- Deals Review
- Objections you need help with?
- Any opportunities you see to increase team value creation?
- Anything else to discuss? (Tech help, admin, process, etc)
- Training Topic

MANAGING SALES TALENT

Monthly [review of the past month]

- How did it go last month for:
 - ◆ MIN
 - ◆ Core Metrics
 - ◆ Objections
- Why did we hit or not hit the MIN?
- What overall objections are being seen? (so that your team can help solve those or pivot?)
- How can we create more value output in this team?
- Then execute!

WHAT DID WE COVER?

- 1 IMPORTANCE OF SALES AND LEVERAGE (OUTCOMES)**
- 2 FINDING YOUR NEXT SALES PERSON**
- 3 FINANCIALLY INCENTIVIZING SALES WITHOUT GOING BROKE**
- 4 CADENCE OF MANAGING SALES TEAM/PERSON**
- 5 FACTORS OF SUCCESS FOR YOUR SALES**
- 6 SHARING WISDOM OF EXPERIENCE**

Wisdom of Experience

**Experience is the teacher of
all things.**

WISDOM OF EXPERIENCE

- They struggle with admin work
- THEY NEED ENCOURAGEMENT
- Successful flow or framework to win for this (4S System or the CLOSER)
- Following up on leads
- Hungry
- They follow up in the interview process
- EXPERIENCE- PAY FOR IT
- Less is more on commission plan
- They don't lie
- They listen/curious
- Referral
- Money is the driving factor but not the ****only**** factor
- Your CRM usually has a goldmine inside of it

***What's the one thing you take away to
save yourself from the lesson I
learned?***



@travisweathers