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Example of completed document.

Role-Specific Sales Activity Level Guidelines

your_company_logo_here

Sales and CS performance flows from a high quantity of high quality selling activities.

Conveniently, many selling activities can be instrumented to help us know if we are indeed engaged in a sufficient quantity and quality of selling activity, and to know ahead of time if we aren't, and take actions to address them before it becomes a problem with bookings, pipeline generation, and so on.

How to use this template: Use this template as a means by which to clearly state expected levels of various metrics, per time interval. The metrics that you choose will likely be different per role (e.g., SDRs aren't responsible for revenue, and AE calling numbers are likely not a first or second tier metrics.) The Atrium Metrics Library can be a good place to go looking for these, but you can put in whatever you. Just make sure you're capturing the metrics that matter to your business. More on this in the Sales Management chapter of Founding Sales.

Make a copy of this document. The below has many metrics listed out, and you can trim out those you don't want, per role, and add others as pertinent.. Make sure to have a set per role - e.g., SDRs will be different from inbound SDRs will be different from SMB AEs will be different from Enterprise AEs. Specify per each. Here's an example of this filled out.

The best way to sort out what the "right" levels are is to look at your existing top performers using a performance instrumentation system like Atrium (or your existing reporting system), gut check if those levels are more broadly tenable, and then document them as the designated benchmark per role.

You may not be right the first time, so as you review metrics in One-on-Ones and Team Meetings, be open to them not being correct, and modifying them.

But proactively stated and documented, but off a bit is WAY better than not proactively stated and documented at all. So at least get some stated.

Role Type Activity Guidelines: TBD_Role_1

Activity Type	**Daily**	**Weekly**	**Monthly**	**Quarterly**
Quantity Measures				
Bookings				
Emails				
Calls				
Meetings				
Accounts Engaged				
Contacts Engaged				
Opportunities Advanced				
Opportunity Ownership Count				
Total Talk Time				
Quality Measures				
Email Engagement Rate				
Untouched Opportunities				
Time Between Opportunity Engagements				
Win Rate				
Average Selling Price				
Follow Up Meeting Ratio				

Connect Rate Per Call				
Talk time per call				
Bookings Per Meeting				

Role Type Activity Guidelines: TBD_Role_2

Activity Type	**Daily**	**Weekly**	**Monthly**	**Quarterly**
Quantity Measures				
Emails				
Calls				
Meetings				
Accounts Engaged				
Contacts Engaged				
Opportunities Advanced				
Opportunity Ownership Count				
Total Talk Time				
Quality Measures				
Email Engagement Rate				
Untouched Opportunities				
Time Between Opportunity Engagements				
Win Rate				

Average Selling Price				
Follow Up Meeting Ratio				
Connect Rate Per Call				
Talk time per call				
Bookings Per Meeting				

Role Type Activity Guidelines: TBD_Role_3

Activity Type	**Daily**	**Weekly**	**Monthly**	**Quarterly**
Quantity Measures				
Emails				
Calls				
Meetings				
Accounts Engaged				
Contacts Engaged				
Opportunities Advanced				
Opportunity Ownership Count				
Total Talk Time				
Quality Measures				
Email Engagement Rate				
Untouched				

Opportunities				
Time Between Opportunity Engagements				
Win Rate				
Average Selling Price				
Follow Up Meeting Ratio				
Connect Rate Per Call				
Talk time per call				
Bookings Per Meeting				