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Founding Sales: The Early Stage Go-to-Market Handbook

Startup Sales for founders (and others) in first-time sales roles.

Founding Sales can now be found on a standalone website here:

https://www.foundingsales.com/

It's much prettier than the old Google Docs. ;)

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Founding Sales is book on startup sales for founders and other first time sales staff written by Pete Kazanjy's, founder of Atrium sales performance analytics and the Modern Sales sales leadership and operations community.

This book is the distillation of Pete's experience at TalentBin going from a founder with a product marketing and product management background to early sales guy, early sales manager, and eventual post-acquisition sales leader at Monster Worldwide, and his later experience founding Modern Sales, the nation's largest sales operations, enablement, and leadership community.

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The book's goal is to accelerate the learning and success of those who find themselves in a similar spot Pete did in early 2011 - don't know much about B2B sales, and need to figure it out in a hurry.

This is the "tip of the branch" of finished chapters (have gone through editing, but may be in various states of release to the broader world) for sharing with those who would like to get use of the materials ahead of their formal "publishing". All rights reserved, yadda yadda, etc. Feedback is encouraged and happily received. Feedback form here.

Dedicated to Mike Kazanjy.

- 1. Introduction - How a product marketing and product management guy ended up a sales leader at a public company (8 min read)
    - What inspired this book?
    - Who is this book for?
    - Why am I qualified to tell this story?
    - Who helped?
    - The two stages of your sales efforts.
    - Part 1: Early Sales and Experimentation (pre-scaling)

- 2. Sales Maturity Stages of a Startup Deck - When to scale, and when not to scale. Why founder-led selling is important.

- **Part 1: Doing the basics correctly, yourself. Going from 0 to ~30 customers and proving you've got something that can be non-zero sold ;)**

    - 2. Sales Mindset Changes - Counterintuitive things to wrap your head around as a first time salesperson. (10 min read)
      (As excerpted on First Round Review, and in presentation format)
        - Embrace Plenty, Not Scarcity.
        - Put Activity above All Else.
        - Be Direct and Get Down to Business.
        - Build Many Shallow Relationships.

        - Assume the Sale Is Inevitable, and It Just Might Be.
        - Expect to Win, but Be Unfazed by Rejection.
        - Record Everything. But Efficiently.
        - Be Expert and Authoritative. It Begets Fearlessness.
        - Make Yourself at Home in a Glass House.
        - Remember, Sales Is about Math.
        - Mindsets That Build on Each Other

    - 3. Baking Your Narrative & Product Marketing Basics - Forming the story of your offering and why it matters to your customer. (20 min read)
      (As excerpted on First Round Review)
        - What Is the Right Formation? (15 min)
        - Things to Know:
            - What is the problem?
            - Who has the problem?
            - What are the costs associated with this problem?
            - How do people currently solve this problem and why do current solutions fall down?
            - What has changed that enables a new solution?
            - How does the new solution work?
        - Qualitative/Quantitative Proof of a Better Solution
        - Pricing
            - Approaches to Pricing
            - Pricing to Perfection
            - Segmenting
        - Put It All Together
        - Example Narratives
            - The TalentBin Narrative (3 min)
            - The Salesforce Narrative (3 min)

    - 4. Sales Materials Basics - Taking the story of your offering, and “weaponizing” it in relevant prospect-facing materials. (50 min read)
        - A Note on Production Value and Speed (2 min read)
        - Sales Decks (16 min read) (As excerpted in First Round Review and in presentation format here, and video format here.)
            - Structuring Your Deck for Extensibility

- Production Value of Your Slides
- Content Management and Deployment
- Customization Mindset
- Section-Specific Slide Notes
  - The Problem and Who Has It
  - Cost of the Problem
  - Existing Solutions and Their Challenges
  - What Has Changed
  - How Your Solution Works
  - Quantitative/Qualitative Proof of a Better Solution
    - Quantitative Proof
    - Qualitative Proof
    - Company-Centric Proof Points
  - Why this will be so easy
  - Pricing
  - Appendices
- Deck for Presenting, Deck for Sending

- Outreach Materials (10 min read)
  - Email Templates
  - Phone and Voice Mail Scripts
- Demo Scripts (8 min read)
  - Customization
  - Example Script
- Video Materials - Demo Video and Explainer Videos (5 min read)
  - MVP Overview Video
  - Explainer Videos
- Other Types of Collateral (3 min read)
  - One-Off Requests
  - On-Demand Collateral

- 5. Prospecting - Finding and targeting relevant Accounts and appropriate Points of Contact within them. (35 min read):
  - Ideal customer profile (5 min read)

        - Characteristics of those who might love you - both outwardly observable and not observable. (12 min read)
        - Finding Accounts that have these characteristics. (7 min read)
        - Finding Contacts within those accounts. (8 min read)

    - 6. Outreach and Demo Appointment Setting (60 minute read):
        - Process Management and early CRM
        - Emailing (Instrumentation and Drip Marketing)
        - Calling (Timing, Gatekeepers, Voicemails, Success, Rejection, and Objections)
        - Setting the Appointment (Meeting invites, remindering)
        - Cadencing - putting it all together.
        - Referral Prospecting
        - Inbound Preview (Inbound Lead Qualification, Lead Capture Forms, Lead Response)

    - 7. Inbound Lead Capture and Response (15 minute read):
        - Inbound Lead Qualification
        - Inbound Lead Capture Forms
        - Inbound Lead Response
        - Lightweight Discovery
        - Follow-Up on Inbound Leads

    - 8. Pitching: Preparation, Presentation, Demo, and Objections (100 minute read)
        - Pitching Goals
        - New Technology Persuasion Formula
        - In Person vs. Digital selling
        - Pre-Call Planning: Size of Prize, Stakeholders, Customization
        - Pitching: Tools & Materials, Format, Discovery, Presentation, Demo, Asking for the Sale / Proposaling,
        - Objection Handling: Generic objections, Solution-specific objections, Competition objections
        - Demo Follow Up & Further Meetings
        - Practice & Iteration

    - 9. Down Funnel: Negotiation, Closing, Pipeline Management (30 minute read)

        - Negotiation
            - Negotiation Basics
            - Urgency
            - Pushing Back against Discount Requests
            - Competitors and Pricing
        - Closing
            - Close Winning: Order forms & Contracts, Getting Paid, Customer Success Prep
            - Close Losting: When to Close Lost, Metadata, Coming back around
        - Pipeline Management
            - Staging
            - Cadencing
            - Pipeline Prioritization & Cleaning
            - Calendar Management & Role Specialization

    - 9. Customer Success Basics - Implementation and Ongoing Customer Success (60 minute read)
        - Why Customer Success Matters
        - Mechanisms for Customer Success
            - Implementation
                - Implementation Calls
                - Implementation Projects
            - Inbound Response / “Support”
            - Proactive Customer Monitoring
            - Success Outcome Capture
            - Quarterly Business Reviews
        - Support Sites and Asynchronous Support Materials
            - New Release Support
            - Renewal Calls
        - Learning from Your Customer Success Team
        - Customer Success Calendar Management and Specialization

- **Part 2: Scaling it up with others. Taking what you’ve proven can be done yourself, and getting others to do it, too.**

    - Early Sales Management & Scaling Concepts: Role Specialization, Early Sales Management, Concepts (Work in Progress)

        - Stages of scale out
            - What is “scaling”?
            - Cautionary tales
        - Specialization of sales roles
            - Sales Role Specialization
            - Sales Maturity Stages
            - Sales Operations
        - Early Sales Management
            - Role of a Manager
            - The Modern, Metrical Sales Manager
            - Sales Instrumentation
            - Managerial Operational Cadence
            - Adding Managerial Layers
            - Professional Development and Promotion Paths
            - Culture
            - When to replace yourself

    - Sales Hiring - Finding, Evaluating, and Closing sales talent to grow revenues (50 min read)
      (As excerpted on First Round Review)
        - Starting to Scale and the Criticality of Quality Sales Hiring
        - Scaling by Specialization
        - Determining Your Hiring Profile (13 min read)
            - Raw Characteristics
            - Professional Characteristics
            - Achievement Characteristics
            - Relationships, or “Hiring a Rolodex”
        - Articulating and Documenting Your Hiring Profile (3 min read)
        - Sources of Hire, or How to Find Your Profile (9 min read)
            - Staffing Agencies
            - Referral Recruiting
            - Job Boards
            - Direct Sourcing

        - Screening, Interviewing, and Closing (21 min read)
            - Screening: Written Screens, Phone Screens, Presentation Screens
            - Interviewing
            - Deciding Between Multiple Candidates
            - Post Interview
            - Compensation
            - Reference Checking
            - Offering and Closing Candidates
            - After-Closing

    - Sales Onboarding & Training - Ensuring new sales staff ramp quickly and avoiding rep flameouts (30 min read)
      (As excerpted on First Round Review)
        - Why Onboarding Matters
        - Onboarding 101 (11 min read)
            - Pre-Work
            - Standard Admin Work
            - Cultural Onboarding
            - Business and Subject-Matter Onboarding
            - Product and Presentation Onboarding
        - Tools and Process Onboarding (12 min read)
            - Provisioning and Configuration
            - Training: Basic Tools
            - Training: Sales-Specific Tools
            - Sales Cycle and Cadence
        - Drilling, Repetition and Shadowing (7 min read)
            - Group Drilling and Repetitions
            - Sparring
            - Pair Programming/Ride-Alongs
            - Bluebirding, Ramp, and Monitoring
        - Ongoing Learning & Development

- Conclusion

- Next Resources: For when you've got the basics down and want to go to the next level!
  - Sales Acceleration Formula - Mark Roberge
  - Cracking the Sales Management Code - Jason Jordan
  - The Sales Development Playbook - Trish Bertuzzi
  - Lightning Sales Ops - Matt Bertuzzi

Potential Future Chapters:

- Reporting - Ensuring the right instrumentation harness to know things are going the right way. And early warning when they're not.
- Marketing activities for Sales Leaders
- Tooling for Scale: Sales enablement via CRM, Email Automation, and other flavors of sales acceleration.
- Scaled Lead Generation - Filling the CRM, and Inbound Marketing