

Team Lead Transition Plan

Team Lead Definition: Transitional period between individual contributor & management. Main focus will be learning how to work with leadership to drive qualitative improvements across the team and acting as a tactical point of contact for upcoming initiatives while still maintaining some AE responsibilities.

Phase 1 - “Team Orientation”

Management Theme: Observation, Assessment, & Coaching.

- New Hires
 - Provide hands-on training for SDR/AE new hires - lead training sessions & role plays; coordinate call blitzes
- Coaching AEs/SDRs in ramp up
 - Become tactical deal level contact for AEs on your team. Specifically, ramping reps.
 - Run training sessions, role plays, shadowing, etc. for folks in ramp up to get them ready to enter the queue.
- Work with other managers on effectively deploying extra bandwidth in the way that will be most productive.
 - I.E. Help “x rep” practice for demos
- Proactively make yourself available to the team
 - Daily walk around
 - Daily slack ping
 - Make sure they know they can reach out to you for deal help
- Join sales leadership meetings, discussions, planning, & offsite
 - Contribute your voice
 - Work on cross-mgr projects
 - Bi-weekly training
- Recruiting
 - Participate in interview panels for SDRs/AEs
 - Selection & assessment of talent

How is success measured?

- 100% AE Goal (75% of quota)
- Qualitative assessment by [Team Member]
- Qualitative assessment by [Team Member]

- Feedback collection from ramping AEs on effectiveness of training

Phase 2 - “The Individual”

Management Theme: Individual Performance & Development

- Become tactical day to day contact for SDRs/AEs. Call shadowing/coaching, daily planning, pipeline management, general questions/concerns/problems.
- Run all 1/1s
 - Be prepared w/data, feedback, next steps, & plan for the rep.
- Create a cohesive team
- Continue to work your pipeline
- Creativity towards performance

How is success measured?

- 100% AE Goal (50% quota)
- Qualitative assessment by [Team Member]
- Qualitative assessment by [Team Member]
- Feedback collection from team members

Phase 3 - “Performance Ownership”

- Ownership of a full team of SDRs/AEs and all associated outcomes while managing a partial quota.

How is success measured?

- 100% AE Goal (25% quota)
- 100% Team Goal
- Qualitative assessment by [Team Member]
- Qualitative assessment by [Team Member]
- Feedback collection from team members

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