Manual Input	
Target 12 month Income:	$220,000
Salary	$120,000
Target Commission	$100,000
Blended Commission Rate (of revenue)	9.00%
Required Sales/year	$1,111,111
Average Deal Size	$25,000
Required Revenue per month	$92,593
Required # of deals closed for the year	44
Required deals closed per month	3.7
Deal Win Rate (qualified opportunities that have proposal stage)	40%
Required Revenue in proposal stage per month (Closeable opportunties)	$231,481.48
Required # of closeable opportunities in this month's pipeline	9.3
First Meeting to Qualified Opportunity (with proposal) Conversion	50%
Required net new meetings/month	19
Prospecting Touchpoint (e-mail/phone/text/LI Request) to meeting conversion	8.0%
Required Touchpoints/month (each touchpoint counts as 1 even if it's to same perso	231

Weekly Targets	
Prospecting Touchpoints per week	58
Prospecting Touchpoints/day	12
Initial New Appointment per week	4.6
New Opportunities Added per Week	2.31
Deals Closed/week	0.93
$ Value of each Prospecting Touchpoint	$36

Start date:	Quarterly Goal	Quarter to Date		Gap
Q1 revenue goal	$0	$0		$0
Q2 revenue goal				$0
Q3 revenue goal				$0
Q4 revenue goal				$0
	$0	**$0**		**$0**

Accelerator	Revenue Band	Commission %	Total
0-100%	$110,000	9.00%	$9,900
100-150%			$0
150-200%+			$0
200%+			$0
	$110,000	**9.00%**	**$9,900**

Why is it important to make $_____
1. I get to provide my children a lifestyle that would suggest they come from a two parent household
2. Constantly changing my family trajectory and continue helping other people from where I come from "think and grow rich"!!
3. Continue helping other single moms
4. Make my money, make money
5.

Commission Gap Calculator	
Commission Gap:	$90,100
Highest Tier Comm	
Revenue Needed	#DIV/0!

COMMISSION GRAVY ON TOP (UPSIDE)			
Multi Year Bonus	**Renewal Bonus**	**New Logo Bonus**	**SPIFFs**

Goal Setting:

To become goal-directed, it's essential to set goals. Here's a framework to do so:

Level	Description
Infinite Purpose	A purpose that is intentionally unattainable
High-Hard Goals	Goals that require significant effort and dedication
Annual Goals	Goals that can be achieved within a year
Quarterly Goals	Goals that can be achieved within a quarter
Monthly Goals	Goals that can be achieved within a month
Weekly Goals	Goals that can be achieved within a week
Daily Goal-Directed Actions	Actions that align with your goals

Reverse Engineering Your Goal Stack

To achieve your goals, it's essential to reverse engineer them. Start with a desired outcome or goal and work backward to determine every necessary step to achieve that outcome. This will help you bridge the gap between your big thinking and execution.

Reverse Engineering Your Goal Stack

Setting a High Hard Goal

High Hard Goal: Become a top-performing SDR by mastering outreach techniques, building a strong pipeline, and consistently exceeding monthly and quarterly activity and performance metrics.

Example: Build a climate tech company that reaches a valuation of $1 billion within 5 years.

Personal Relationship

Breaking Down the High Hard Goal

Year	Goal
1	Learn and master the product, tools, and SDR processes while booking 20-30 qualified meetings per month.
2	Build a strong personal pipeline strategy, create efficiencies, and increase meeting quantity by 20-30%.
3	Develop leadership capabilities, coach peers, and consistently exceed metrics to prepare for an AE role.

Quarterly Goals

Quarter	Goal
1	Complete SDR training, master sales tools (e.g., Salesforce, Outreach, Warmly), and book your first 15 meetings. Achieve 80%+ of activity targets (calls, emails, outreach), focus on personalized messaging, and close 3 qualified opportunities (passed to AE).
2	Build relationships with top accounts, improve lead qualification, and test A/B outreach strategies.
3	Analyze past performance, refine outreach sequences, and prepare to exceed next year's activity and meeting targets.

Monthly Goals

Month	Goal
1	Complete all training, master tools (e.g., CRM, email sequences), and identify 50 target prospects.
2	Conduct outreach to 20+ prospects weekly, set 8-10 qualified meetings, and refine email copy based on feedback.
3	Book 12-15 meetings, develop strategies to improve LinkedIn outreach, and deepen account research skills.

Weekly Goals

Week	Goal
1	Review product knowledge, identify 80-75 prospects, and draft initial outreach emails or sequences.
2	Start outreach (calls, emails, LinkedIn), engage with 10-15 prospects daily, and schedule 3 meetings.
3	Optimize outreach methods based on feedback (e.g., response rates), book 6-8 meetings, and track metrics in CRM.
4	e performance, identify gaps (e.g., missed follow-ups), and plan for higher outreach volume or improved efficiency next month.

Activity Guide:

Activity	Points
Prospects added to cadence	1 point per 5 contacts added
Prospecting calls made	1 point per 3 calls
Conversations with correct contacts	2 points per conversation
Custom InMails/Emails sent	1 point per 3 sent
Initial meetings booked	3 points per meeting booked
Opportunities qualified	5 points per opportunity passed to AE

Daily Activity Goals	Remember
80 prospects added to cadence: (10 points)	Quality over quantity always
36 calls made: (10 points)	Block time specifically for research, prospecting, and outreach.
9 meaningful conversations with decision-makers: (10 points)	Create power hours for calls and emails to maintain focus
10 custom emails/inMails sent: (3 points)	Track your contribution to pipeline growth by the number of meetings booked and opportunities passed along.
2 meetings booked: (6 points)	
1 opportunity qualified: (5 points)	
Personal development (1 hour): (1 point)	
Total Daily Goal: 45 points	

Daily planning and task blocking

Plan day before the day starts and block all critical task in calendar

Fill in the white space so that you don't get distracted.

15 min or a one hour block for multiple things

Keep buffer blocks

Use Role and or Blitz app to help and hold yourself accountable

RGA Get highest priority work done today!!

1. Advance Pipeline

Identifying deal next steps

Examining the gaps in deals

Reaching out to clients

Internal dry runs and prep calls

Client meetings

2. Creating Pipeline

Identifying new contacts

Account/contact research

Writing e-mail copy/sequences

Outreach

Urgency levers:

Budget cycles and fiscal year-ends

Prospects pain points and their intensity

Recent trigger events in the prospect's business

Decision-maker engagement level

Competitor activity in the account

Time since initial contact or proposal submission

Changes in the prospect's buying process or team

Usage of free trials or demos (if applicable)

Frequency and quality of prospect interactions

Requests for specific information or customizations

Habits to improve forecasting and create urgency:

Set clear next steps after every interaction

Use mutual action plans with prospects

Identify and engage all key stakeholders early

Quantify the cost of inaction for prospects

Practice active listening to uncover hidden motivations

Regularly reassess deal health and adjust strategies

Use time-bound offers or incentives strategically

Leverage social proof and case studies effectively

Develop a sense for non-verbal cues in meetings

Consistently follow up and provide value between formal touchpoints

Category	Questions
Understanding the Current State	
	1. "How does your team currently decide which website visitors to prioritize for outreach?"
	2. "What's your team's process for identifying leads who are most ready to engage?"
	3. "Are your reps spending more time researching leads or actually having conversations with prospects?"
	4. "What tools or systems do you rely on for lead tracking and prioritization?"
	5. "What's been working well in your lead generation efforts, and what feels like it could be better?"
Identifying Challenges	
	6. "What's the biggest challenge your team faces when it comes to personalizing outreach?"
	7. "Does your team ever feel like they're chasing leads that don't go anywhere?"
	8. "How easy is it for your team to figure out which leads are high-value and worth pursuing?"
	9. "Where do you think your team is losing the most time in the lead qualification process?"
	10. "When promising leads don't convert, what do you think gets in the way?"
Creating Curiosity	
	11. "Have you ever wondered who's visiting your website and why they're there?"
	12. "If you could see exactly which leads were actively exploring your offerings, how would that change the way your team works?"
	13. "What do you think your team could achieve if they only focused on leads that were ready to buy?"
	14. "How much of a difference would it make if your reps could instantly prioritize high-intent leads?"
	15. "How valuable would it be to spend less time researching and more time engaging qualified prospects?"
Qualifying for the Next Step	
	16. "How important is it for your team to improve lead engagement right now?"
	17. "Who typically evaluates tools like this in your organization?"
	18. "Is there someone on your team, like the Head of Sales or CRO, who might need to weigh in on this?"
	19. "What's the best way for us to continue this conversation with your broader team?"
	20. "Are you open to scheduling a deeper conversation with my colleague to see how this could work for your team?"
Rules:	
Focus on Discovery and Curiosity	Uncover surface-level challenges and pique the prospect's interest in Warmly without diving too deeply into ROI or long-term impact
Simplified Problem and Implication Questions	Explore day-to-day frustrations and gaps in their current processes
Actionable for Handoff	Make sure you can can smoothly transition qualified leads to the AE
Conversational and Assumptive	Sound confident in knowing their problems as if this is something we solve all the time

Example Flow for SDRs at Warmly

Step 1: Build Rapport
"I saw your team focuses on generating leads for [industry]. How's that process working for you today?"

Step 2: Uncover Current State
"What tools are you using to identify which leads are ready to engage? Are there any frustrations with how those tools work?"

Step 3: Explore Desired Future State
"If you had better visibility into who's ready to buy, how would that change the way your team works?"

Step 4: Identify the Gap
"What's stopping your team from hitting your pipeline goals right now?"

Step 5: Create Urgency
"If this challenge persists, how might it affect your ability to meet this quarter's goals?"

	Deal Check		Deal 1	Deal 2	Deal 3	Deal 4	Deal 5	Deal 6	Deal 7			
	SDR Responsibility	**AE Responsibility**										
Problem with Pain	What challenge are they facing in their role/team? How does this impact their day-to-day or team efficiency?	What specific financial or operational pain does this cause? What is the cost of the problem?										
	Is this a critical issue or just a minor inconvenience?	How severe is the problem, and how does it negatively affect broader company goals or revenue?										
Reason (Company Motivation)	Why might this issue be important to their team or department?	Why is solving this critical to their company's KPIs? What metrics are they failing to meet due to this problem?										
	What internal team goals might this challenge prevent them from hitting?	Why does the company need to change what they're doing today to meet long-term strategic goals?										
Reason (Personal Motivation)	How would solving this problem make their role easier or their team more successful?	What's at stake for them personally if this isn't solved? Are they incentivized to solve this problem (e.g., bonuses)?										
	Is this problem relevant enough to them to drive a next step?	What's their personal stake in getting this approved (e.g., career advancement, job security)?										
Reason (Why Us)	Have they tried other solutions? How do they see Warmly fitting into their current workflows?	Why would they choose Warmly over competitors? How does Warmly solve a problem they've been unable to fix otherwise?										
Engagement	Is the prospect open to further conversation and willing to discuss the problem?	Are we single-threaded or multi-threaded? Are we engaging directly with economic buyers and champions?										
	Do they see enough value to agree to a meeting with an AE?	Are champions advocating for us internally, and are they responsive to further inquiries?										
Decision Maker(s)	Do they know who the decision-maker is for this type of solution?	Have we directly engaged with the decision-maker? Are all stakeholders aligned and bought in?										
	Can they connect us to the person responsible for solving this issue?	Do we have a champion willing to introduce us to key stakeholders and decision-makers?										
Decision Process	Do they have a general process for evaluating solutions like this?	What's their detailed decision-making process, including approvals, funding sources, and timelines?										
Impact	What broad outcomes might they hope to achieve with a solution?	What specific ROI or measurable improvements (e.g., time, cost savings, revenue growth) can our solution deliver?										
	What initial benefits might a solution like Warmly bring to their team?	How will Warmly help achieve executive-level goals and long-term strategic priorities?										
Cost of Inaction	What might happen if this problem isn't addressed? How could this delay impact their team's performance?	What are the exact costs of doing nothing (e.g., lost revenue, wasted time, competitive disadvantage)?										
Cost of Solution	Are they open to investing in a solution if it helps them solve this problem?	Have we reviewed a proposal with them, and do they understand the cost-benefit ratio of investing in Warmly?										
Timeline	Is this problem urgent enough to prioritize a meeting to discuss potential solutions?	What is their implementation timeline, and is there a compelling event driving their need for a solution?										