

How To Scale Your Revenue Org: From Your 1st Hire To 20+ Reps

A conversation on best practices for scaling your sales team.

ATRILUM®  ACCORD



What's on the agenda?

- Introductions (5m)
- The different phases of scaling your revenue org (35m)
 - Proof of concept (lead gen, selling, closing, and onboarding)
 - Prove success for a team of teams (SDR, AE, and CSM)
 - Insert additional layers of management (2nd+ layer)
- Resources to continue your learning...(5m)

Let's meet our speakers



Pete Kazanjy

Co-Founder, CRO
Atrium



Ross Rich

Co-Founder, CEO
Accord

Before we dive into the content...

What story are we telling today?

Phase 1: How to prove the successful performance of a **complete unit of revenue production**, including lead gen, selling & closing, & onboarding

Phase 2: How to demonstrate the successful performance of a **full team of teams**; full complement of AE team, SDR team, CS team, working under one manager

Phase 3: How to clone that prior unit and get another platoon up to speed, typically involving **another managerial layer**





Can we make a mini sales team?

What's a mini sales team look like?

MGT.

Business Founder

IC

Sales Development Representative

Account Executive

Account Executive

Customer Success Manager

Unit of Revenue Production

"Revenue mitochondria"

Lead Gen

Selling

Success

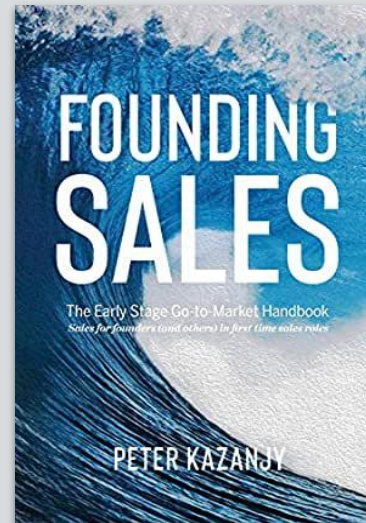


“How to” build a mini sales team



Prove successful performance of a complete unit of revenue production, including lead gen, selling & closing, & onboarding.

- How do you know it's time for this phase?
- What should you look out for?
- Best practice examples

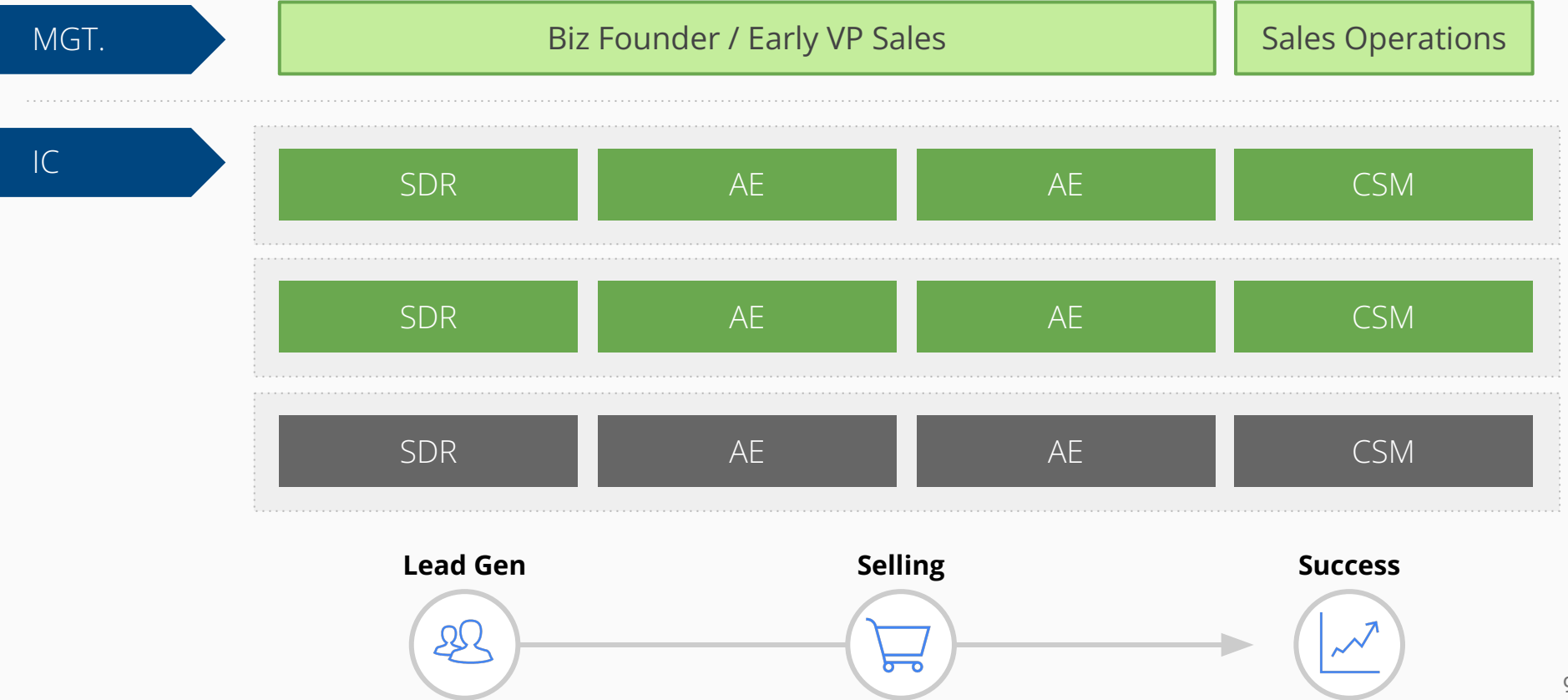


<https://bit.ly/no-ask-founding-sales>



**Can we max out an
initial sales team?**

What's a team of teams look like?

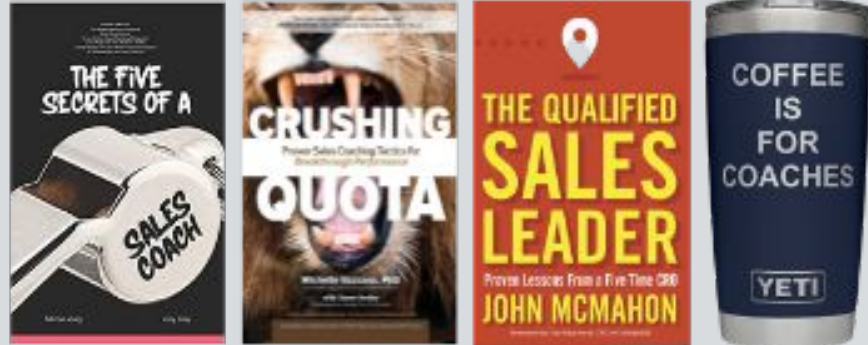


“How to” max out an initial team



Demonstration of the successful performance of full team of teams. SDR, AE, and CS teams working under one manager.

- How do you know it's time for this phase?
- What should you look out for?
- Best practice examples

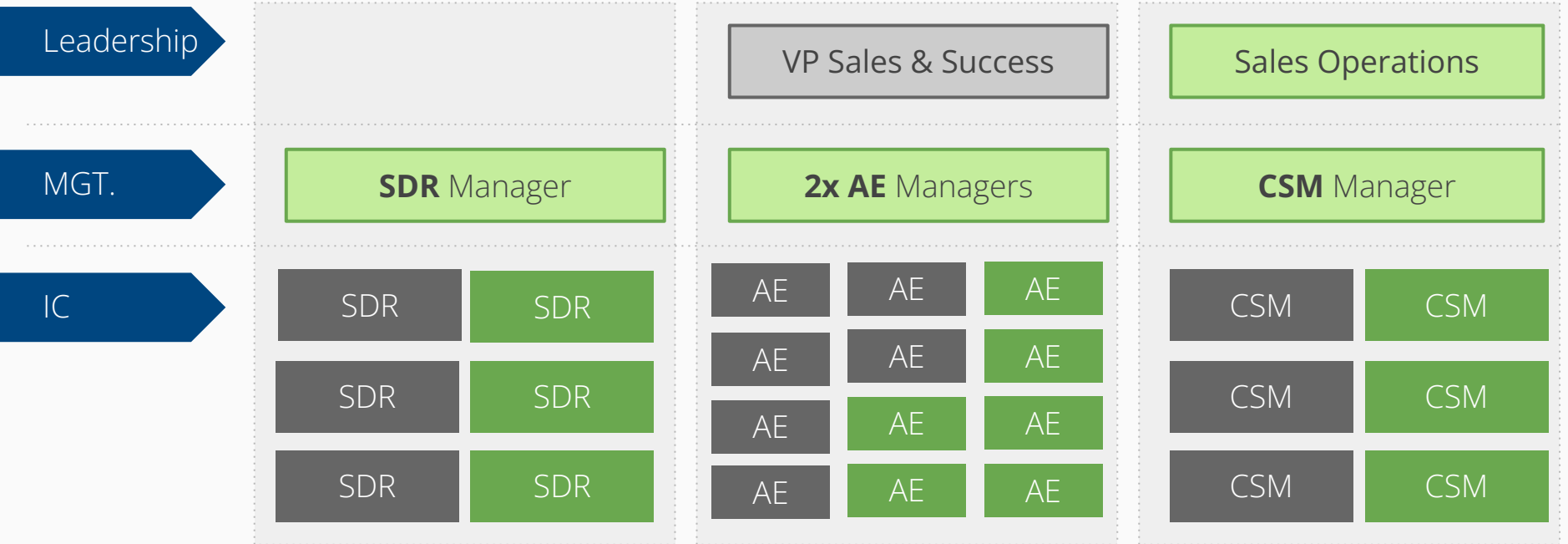


<https://bit.ly/sales-leader-survival-kit>



**Can we make a successful
team of teams?**

What does 2nd level mgrs look like?



Lead Gen



Selling



Success



“How to” hire 2nd level mgrs



Demonstration of the successful performance of full team of teams. SDR, AE, and CS teams working under one manager.

- How do you know it's time for this phase?
- What should you look out for?
- Best practice examples



<https://bit.ly/sales-management-survival-kit>

Resources & Thank You!

“How To” Build a Mini Sales Team

- [Sales Management 101](#)
- [Founding Sales](#)
- [Accord](#)



“How To” Max Out 1st Sales Team

- [SaaS Sales Staff Model](#)
- [Scaled Sales Onboarding](#)
- [Predictable Revenue](#)
- [Atrium](#)
- [Sales Leader Survival Kit](#)



“How To” Hire a 2nd Level of Managers

- [Sales Hiring](#)
- [Sales Onboarding](#)
- [Sales Scaling Model](#)
- [Sales Mgr Survival Kit](#)



Appendix

“How to” build a mini sales team...

PROOF OF COHESIVE UNIT OF REVENUE PRODUCTION & RETENTION

GOAL

Prove successful performance of a “complete unit” of revenue production, including lead gen, selling & closing, & onboarding.

Key Activities:

Continued orchestration refinement and management.
Continued sales tooling creation. Hiring of a dedicated customer success staffer.
Founder is spending nearly all time hiring, onboarding, training, and managing.

Tools used All previous, plus refined managerial playbook. A set of meetings for operational cadence. Sales process, handoffs, and CRM.

Who does them? Founder is now out of day to day selling. A single unit of “revenue production” - whatever that is for your organization. A common example is one SDR, two AEs, a one CSM. This is where you might hire a sales manager / leader, as the next step is to clone this unit a handful of times.

“How to” build a mini sales team...

PROOF OF COHESIVE UNIT OF REVENUE PRODUCTION & RETENTION

GOAL

Prove successful performance of a “complete unit” of revenue production & retention, including lead gen, selling & closing, & onboarding.

Key Activities:

Continued orchestration refinement and management.
Continued sales tooling creation. Hiring of a dedicated customer success staffer.
Founder is spending nearly all time hiring, onboarding, training, and managing.

Exit Criteria The unit is producing revenue at a predictable rate, all members are hitting their goal KPIs, with smooth handoffs & proper backchecks to prevent dropped balls. You are confident you can now clone this.

Anti-pattern In that this pattern is more flexible, it's harder to concretely define an anti pattern. Probably the worst would be scale out of one function, out of line with the others. That is, five AEs, but only one SDR, and one CSM. Or no CSMs. Balance is the key.

“How to” max out an initial sales team...

INITIAL REVENUE TEAM MAXIMIZATION

Demonstration of the successful performance of full team of teams. Full complement of AE team, SDR team, CS team, working under one manager.

GOAL

Key Activities:

Same as previous step, but with more managerial complexity.

Tools used Same as before, but with more focus on orchestration and managerial tooling & process. Particularly investment in analytics.

Who does them? If you haven't yet hired a sales manager, this is where you might. Alternatively, you might wait until you understand the playbook, and then bring in someone.

Exit Criteria The complete unit is producing revenue at a predictable rate, all members are hitting their goal KPIs, and you are confident you can now hand a unit like this to a manager to manage, and start to clone this unit.

Anti-pattern Unclear. Potentially handing the beginnings of this unit off to a manager before fully baking it yourself. Or by racing through this stage to the next one before proving that this stage was successfully achieved.

“How to” add in 2+ layers of management...

PROOF OF REVENUE TEAM ABSTRACTION

GOAL

You now want to prove that you can clone that prior unit and get another “platoon” up to speed, typically involving another managerial layer.

Key Activities:

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Tools used Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis.

Who does them? Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis.

Exit Criteria Proven rep unit productivity, utilization

Anti-pattern Premature scale. Uncontrolled growth. Insufficient opportunities to fee rep calendars. Sloppy / upside down unit economics. Process doesn't scale with team complexity.