

BASELINE
COMPANY

**Creating Stronger Sales Teams
from
The Baseline Company**

www.TheBaselineCompany.com

The Value of Sales Baseline

Sales Baseline will be a catalyst for achieving:

1. **Improved Quota Performance**
 - a) Takes average performers to quota performers
 - b) Increases your Top Performers
2. Does Your Organization Have a “**Winners Circle**” or “**Presidents Club**”?
 - a) Sales Baseline will help you ***double next years participants!***
3. More Results from **Your Million Dollar Payroll Investment**
 - a) Even with 5 reps payroll, benefits and sales/marketing expenses - \$1M
 - b) For a 100 person sales organization - \$20M
 - c) **For a tenth's of a %** - we'll help you get more ROI from your current investment
4. **Reduce Staff Turnover**
 - a) Cost of recruiting; Time to Train and On-board
 - b) Loss of Coverage during transition; Leads not followed up
 - c) Loss of customer; Brand/ Reputation

Development Background

- Sales Baseline was developed by Sales, Marketing and Business Executives. Our developers included people with the following experience:
 - ✧ Direct Sales
 - ✧ Indirect/Channel Sales
 - ✧ First to Third Line Sales Management
 - ✧ Business Owners
 - ✧ F500 Business Unit Executives
 - ✧ Marketing Management
 - ✧ Sales Operations
 - ✧ Professional Service Management
 - ✧ Controllers

Creating Stronger Sales Teams – through Organizational Strength

- Sales Baseline self-assessment on sales & marketing organization
- Goal – Provide a stronger organization for sales to leverage
- It identifies what’s working and what isn’t
- It guides you in prioritization of the important issues
- It is useful to the single executive
- It is most valuable with multiple participants
 - ✧ It “starts the conversation”
 - ✧ It gets people off the sidelines and positively engaged
 - ✧ It replaces compromise with consensus
 - Covey – “Seek to Understand”

Premise

- You are the experts of your organization yet....
- Closer you are to issues the more objectivity is lost
- Want an objective assessment of your opportunity gaps
- Don't have \$\$\$\$ for Outside Consultants
- Don't have time to wait weeks/months
- Want validation or recalibrate NOW

Everyone's Value is Different

- New Executive – Want lay of the land (data) fast
- Something's wrong – not sure what
- Need to spark momentum
- Strong leaders and the Bobblehead Syndrome
- PC/VC who want more from their investment
- Sales and Marketing not on same page or misunderstanding
- **“How Aligned is Your Team?”**
- **“What were they thinking?!?!?!”**
- **“If only I had Known”**

Value, continued

- Curious how you compare....”is the grass really greener over there?”
 - ✧ Desire to compare yourself to the best run sales organizations
- Minor problems add up over time
- Allows “upward” information flow
- The basic question is: “***When is the last time you baselined your sales organization?***”
- Standard, Semi-Custom and Custom

Sales Baseline Assessment Process

- Step back from the madness and the deadlines for 20 minutes....Identify your capabilities and constraints and pinpoint strategic areas for improvement.





Your Sales Performance Index™:

56

Your Prior Year SPI™:

N/A

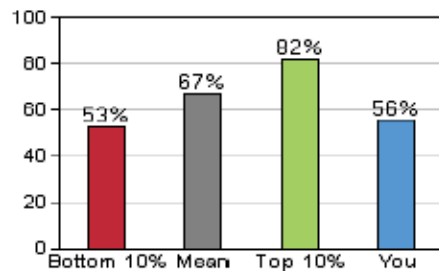
Capabilities

| Sales Statements | |
|-----------------------------|-----|
| Staff Performance | 62% |
| Prospecting & Qualification | 59% |
| Sales Processes | 62% |

Constraints

| Sales Statements | |
|------------------|-----|
| Sales Management | 48% |
| Market Planning | 49% |

QuadSales Benchmark SPI Comparison



Total Distribution: 8
Percentage: 100%

Total Participants: 8

| Group Name | Participants |
|------------------|--------------|
| Sales Staff | 4 |
| CEO | 1 |
| Management Staff | 3 |

Capabilities and Constraints Definitions

Capabilities are defined as those service categories that are view as "High-Impact" (important to the customer) and "High-Performing" (generally perceived as satisfactory performance).

Constraints are defined as those service categories that are view as "High-Impact" (important to the customer) and "Low-Performing" (generally perceived as less satisfactory performance).



QuadStrat Enterprise (Sales Edition)

Degree Of Impact Results

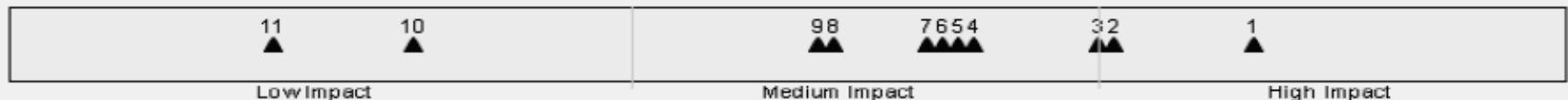
Sales Statements



| All Participants | | |
|------------------|-----------------------------|-------|
| No. | Category | Score |
| 1 | Staff Performance | 62% |
| 2 | Sales Management | 48% |
| 3 | Market Planning | 49% |
| 4 | Prospecting & Qualification | 59% |
| 5 | Sales Processes | 62% |
| 6 | Compensation | 62% |
| 7 | Infrastructure | 51% |
| 8 | Mrkt Initiatives | 60% |
| 9 | Bus. Mgmt | 61% |
| 10 | Prof Svcs/Proj Mgmt | 60% |
| 11 | Sales Training | 42% |

- Primary Objective Improve scores of High Impact - Low Score and High Impact and High Score categories

This chart illustrates the actual spacing of the elements on the Impact axis.



Sales Baseline

Sales Specific Categories and Statements

Scores

Ranking

Sales Performance Index - SPI

Constraints

Comparison

Report Card

Capabilities

Impact Results

SPI Benchmark

QuadStrat Enterprise (Sales Edition)
Performance Scores

NA: Not Applicable DK: Don't Know S: Strongly Disagree D: Disagree S: Satisfactory

| Statement | NA | DK | S | D | S |
|--|----|----|------|----|----|
| 1 Our marketing staff understands the business drivers in our markets. | 0% | 0% | 100% | 0% | 0% |
| 2 We have thoroughly defined our various target markets. | 0% | 0% | 100% | 0% | 0% |
| 3 We have an "Ideal Client Profile" which is used by the sales team in identifying prospects in each market. | 0% | 0% | 100% | 0% | 0% |
| 4 We prepare an annual marketing plan. | 0% | 0% | 100% | 0% | 0% |
| 5 We revise our marketing plan as needed during the year. | 0% | 0% | 100% | 0% | 0% |
| 6 We have a current social media strategy. | 0% | 0% | 100% | 0% | 0% |
| 7 We report key Marketing indicators to the staff. | 0% | 0% | 100% | 0% | 0% |

Your Sales Performance Index™: 56
Your Prior Year SPI™: N/A

2012 Sales Baseline
Prepared By: J.R. Samples on 5/26/2012

All Participants

| No. | Category | Score |
|-----|-----------------------------|-------|
| 1 | Staff Performance | 82% |
| 2 | Sales Management | 48% |
| 3 | Market Planning | 49% |
| 4 | Prospecting & Qualification | 59% |
| 5 | Sales Processes | 82% |
| 6 | Compensation | 82% |
| 7 | Infrastructure | 82% |
| 8 | Mkt Initiatives | 82% |
| 9 | Bus. Mgmt | 82% |
| 10 | Prof Svcs/Proj Mgmt | 82% |
| 11 | Sales Training | 82% |

QuadStrat Enterprise (Sales Edition) Report Card

Your Sales Performance Index™: 56
Your Prior Year SPI™: N/A

2012 Sales Baseline
Prepared By: J.R. Samples on 5/26/2012

QualiStat Benchmark SPI Comparison

| Category | Score |
|------------|-------|
| Bottom 10% | 45% |
| 10% Mean | 67% |
| Top 10% | 82% |
| You | 56% |

Capabilities and Constraints Definitions

Capabilities are defined as those service categories that are view as "High-Impact" (important) and are perceived as satisfactory performance.

Constraints are defined as those service categories that are view as "High-Impact" (important) and are perceived as less satisfactory performance.

2012 Sales Baseline
Prepared By: J.R. Samples on 5/26/2012

Sample Report

- The Value of Multiple Group Segmentation
 - ✧ CEO
 - ✧ Executive Team
 - ✧ Sales Staff



QuadStrat Enterprise (Sales Edition)

Performance Scores

NA: Not Applicable DK: Don't Know 1: Strongly Disagree 2: Disagree 3: Somewhat Disagree 4: Somewhat Agree 5: Agree 6: Strongly Agree



Not Applicable Don't Know Disagree Agree

Market Planning

| | | No. | FREQUENCY OF RESPONSE | | | | | | | | Post. Score | Mean Score | Std. Dev. | | Mean Score | Std. Dev. |
|---|------------------|-----|-----------------------|----|-----|------|-----|------|------|----|-------------|------------|-----------|-----------------|------------|-----------|
| | | | NA | DK | 1 | 2 | 3 | 4 | 5 | 6 | | | | | | |
| 1 Our marketing staff understands the business drivers in our markets. | All | 8 | 0% | 0% | 13% | 38% | 38% | 13% | 0% | 0% | 0% | 42% | 15 | All | 49% | 17 |
| | Sales Staff | 4 | 0% | 0% | 25% | 0% | 75% | 0% | 0% | 0% | 0% | 42% | 16 | Sales Staff | 48% | 16 |
| | CEO | 1 | 0% | 0% | 0% | 100% | 0% | 0% | 0% | 0% | 0% | 33% | 0 | CEO | 55% | 22 |
| | Management Staff | 3 | 0% | 0% | 0% | 67% | 0% | 33% | 0% | 0% | 0% | 44% | 19 | Management S... | 49% | 16 |
| 2 We have thoroughly defined our various target markets. | All | 8 | 0% | 0% | 0% | 50% | 38% | 0% | 13% | 0% | 13% | 46% | 17 | | | |
| | Sales Staff | 4 | 0% | 0% | 0% | 50% | 50% | 0% | 0% | 0% | 0% | 42% | 9 | | | |
| | CEO | 1 | 0% | 0% | 0% | 0% | 0% | 0% | 100% | 0% | 100% | 83% | 0 | | | |
| | Management Staff | 3 | 0% | 0% | 0% | 67% | 33% | 0% | 0% | 0% | 0% | 39% | 9 | | | |
| 3 We have an "Ideal Client Profile" written to assist the sales team in identifying prospects in each market. | All | 8 | 0% | 0% | 0% | 63% | 25% | 13% | 0% | 0% | 42% | 12 | | | | |
| | Sales Staff | 4 | 0% | 0% | 0% | 50% | 25% | 25% | 0% | 0% | 48% | 15 | | | | |
| | CEO | 1 | 0% | 0% | 0% | 100% | 0% | 0% | 0% | 0% | 0% | 0 | | | | |
| | Management Staff | 3 | 0% | 0% | 0% | 67% | 33% | 0% | 0% | 0% | 9 | | | | | |
| 4 We prepare an annual marketing plan. | All | 8 | 0% | 0% | 0% | 0% | 0% | 88% | 0% | 0% | 69% | 5 | | | | |
| | Sales Staff | 4 | 0% | 0% | 0% | 0% | 0% | 100% | 0% | 0% | 67% | 0 | | | | |
| | CEO | 1 | 0% | 0% | 0% | 0% | 0% | 0% | 100% | 0% | 83% | 0 | | | | |
| | Management Staff | 3 | 0% | 0% | 0% | 0% | 0% | 100% | 0% | 0% | 67% | 0 | | | | |
| 5 We revise our marketing plan as needed during the year. | All | 8 | 0% | 0% | 0% | 13% | 25% | 63% | 0% | 0% | 58% | 12 | | | | |
| | Sales Staff | 4 | 0% | 0% | 0% | 0% | 25% | 75% | 0% | 0% | 63% | 8 | | | | |
| | CEO | 1 | 0% | 0% | 0% | 0% | 0% | 100% | 0% | 0% | 67% | 0 | | | | |
| | Management Staff | 3 | 0% | 0% | 0% | 33% | 33% | 33% | 0% | 0% | 50% | 16 | | | | |
| 6 We have a current social media strategy. | All | 8 | 0% | 0% | 0% | 13% | 13% | 63% | 13% | 0% | 63% | | | | | |
| | Sales Staff | 4 | 0% | 0% | 0% | 25% | 25% | 50% | 0% | 0% | 54% | | | | | |
| | CEO | 1 | 0% | 0% | 0% | 0% | 0% | 100% | 0% | 0% | 67% | | | | | |
| | Management Staff | 3 | 0% | 0% | 0% | 0% | 0% | 67% | 33% | 0% | 72% | | | | | |
| 7 We report Key Marketing Indicators to the staff. | All | 8 | 0% | 0% | 0% | 100% | 0% | 0% | 0% | 0% | 33% | 0 | | | | |
| | Sales Staff | 4 | 0% | 0% | 0% | 100% | 0% | 0% | 0% | 0% | 33% | 0 | | | | |
| | CEO | 1 | 0% | 0% | 0% | 100% | 0% | 0% | 0% | 0% | 33% | 0 | | | | |
| | Management Staff | 3 | 0% | 0% | 0% | 100% | 0% | 0% | 0% | 0% | 33% | 0 | | | | |

Measures Disagreement Measures Agreement

Measures Alignment

Measures Satisfaction

Yeah but...

- Will it expose my warts?
 - ✧ Well unless you are perfect, yes. And it's supposed to.
- Should I fix things over the next few months and then take it?
 - ✧ No. The process is designed to provide objective data on where to focus.
- But not all the categories/statements apply.
 - ✧ This is a “glass is half full” scenario. We absolutely guarantee you'll walk away with 3 to 5 critical takeaways.
 - ✧ You can also customize for your specific requirements
- Will my boss see it?
 - ✧ The only people who see it are the people who you want to see it.

Competitive Landscape

- Material and Substantial breadth and scale
 - ✧ Not 15 questions thought up over the weekend via Survey Monkey)
- Group Segmentation (vs. all in)
- Benchmarks
- Weighing vs. Rating – Provides Alignment Check
- No Bias – Cronbach Alpha
 - ✧ From Wikipedia, Cronbach's (alpha)[1] is a coefficient of internal consistency. It is commonly used as an estimate of the reliability of a psychometric test for a sample of examinees.
- Actionable High Quality Reports
 - ✧ One Page Score Card
 - ✧ Quadrant Analysis by Group
 - ✧ Industry Benchmarks via graphical Spidergrams
 - ✧ Standard Deviation
 - Category – Group - Statement

TBC Big Picture

- Four Primary Baselines
 1. Board Baseline (Governance)
 2. Leadership Baseline
 3. Business/Organization Baseline
 4. Departmental Baselines
 - **Sales Baseline** (Organizational not behavior/personality)
 - Finance, IT, HR and others Under Development
- Industry Specific Versions
 - ✧ Not-For-Profit – Education - Government
- Multi-Level Respondents – Board, Management, Employee

Pricing

- Pricing is affordable to a single executive
- Highest value is when you pull in multiple participants and groups
- Includes 30+ page report, action planning sheets and virtual debrief
- On-site Debrief/Planning Available

Value - Recap

- **Improve Quota Performance**
 - ✧ 10 reps with \$1M quota = \$10M
 - ✧ If Performance is 75% - **\$2.5M Revenue Gap**
- Million Dollar Payroll Investment
 - ✧ 10 reps @\$75k plus benefits plus expenses
 - ✧ National Org 100 sales reps - \$15M + Payroll and Sales Expenses
 - ✧ **For a tenth of a %** - we'll help you get more ROI from your current investment
- **Reduce Staff Turnover**
 - ✧ Cost of recruiting; Time to Train and On-board
 - ✧ Loss of Coverage during transition; Leads not followed up
 - ✧ Loss of customer; Brand/ Reputation
- Create Positive Attitudes and Actions
- Does Your Organization Have a **“Winners Circle”** or **“Presidents Club”**?
 - ✧ Sales Baseline will help you ***double next years participants!***

Thank You!

- Questions, Comments and Suggestions!
 - ✧ Contact us at 312-869-9008
 - ✧ JR@SalesBaseline.com
- Two YouTube Video's for further reference
- <http://www.youtube.com/user/SalesBaseline?feature=guide>