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Supercharge Your Growth: *Using Data to Transform your Sales Coaching*

Matt Evans

*Director of Enterprise Transformation
Salesforce*

Brad Cea

*Area Sales Director,
Waste Management Corp.*

Rob Jeppsen

*CEO
Xvoyant*





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Statement under the Private Securities Litigation Reform Act of 1995

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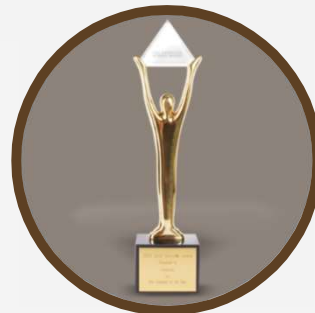
Meet Rob Jeppsen



CEO, Xvoyant



Sales Transformation Technology



16 Stevie Awards



Salesforce "ABC" Surfboard



High-Impact 1:1's through Salesforce

25 Years Enterprise Sales & Sales Leadership

Technology
Financial Services
Companies of all sizes.
Host of "The Sales Leadership Podcast"

Sales Transformation Platform

"Sales Coaching Technology of the Year."
52 Countries Worldwide
Market Leaders

American Business Awards

Sales Coach of the Year
Coaching Program of the Year
Sales Team of the Year
Sr. Sales Leader of the Year

"Always Be Closing" Award

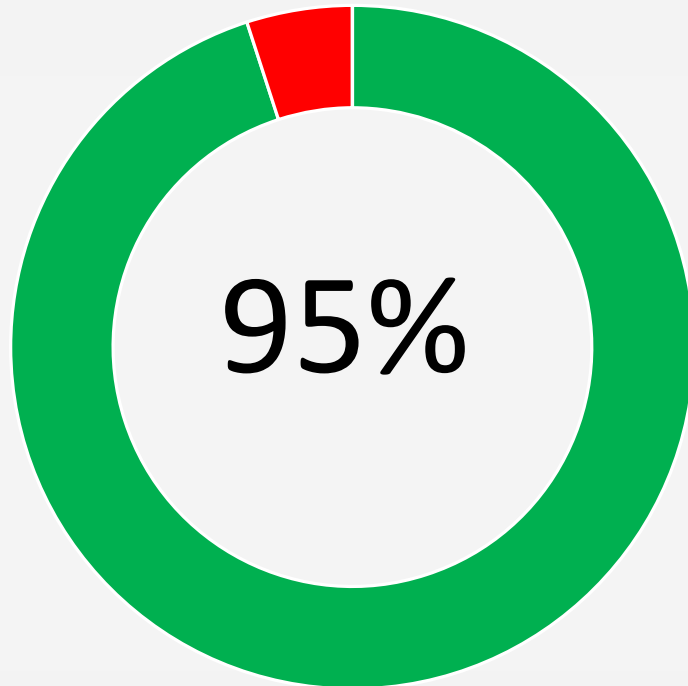
Top Salesforce install used for winning new business.
"How do I coach with SFDC and leave reps feeling inspired?"

Use the 1:1 as Fuel for Sales Transformation

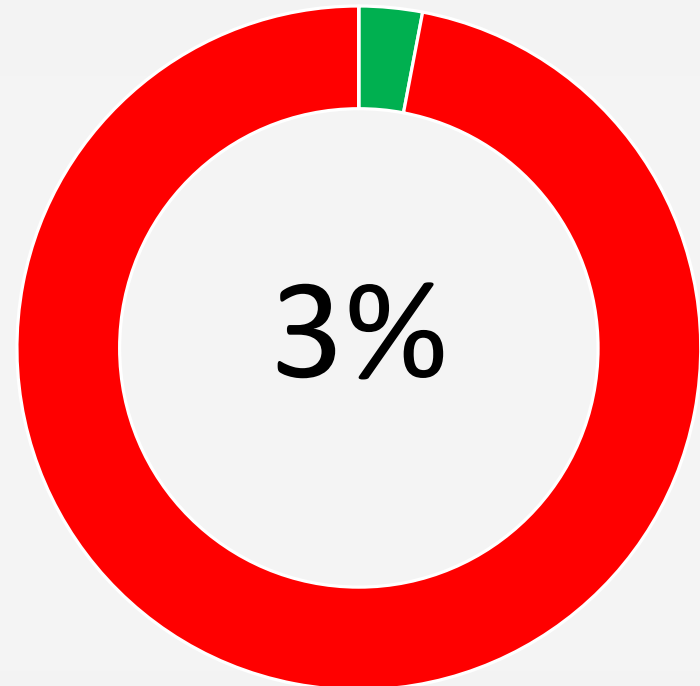
Achieve Aspirations
Win More
Fill Pipeline Gaps
30,000 / 0

@RobJeppsen #Xvoyant #DF19

% of Sales Teams that Have...



Some Sales Process*



1:1 Coaching Process*

*SalesMastery, 2019

The Coaching Gap is Very Real*

48%

*Of Salespeople
Say...*

“I NEVER
get any Coaching.”

83%

Of Sales Managers Say...

“I’m AWESOME
at Coaching.”

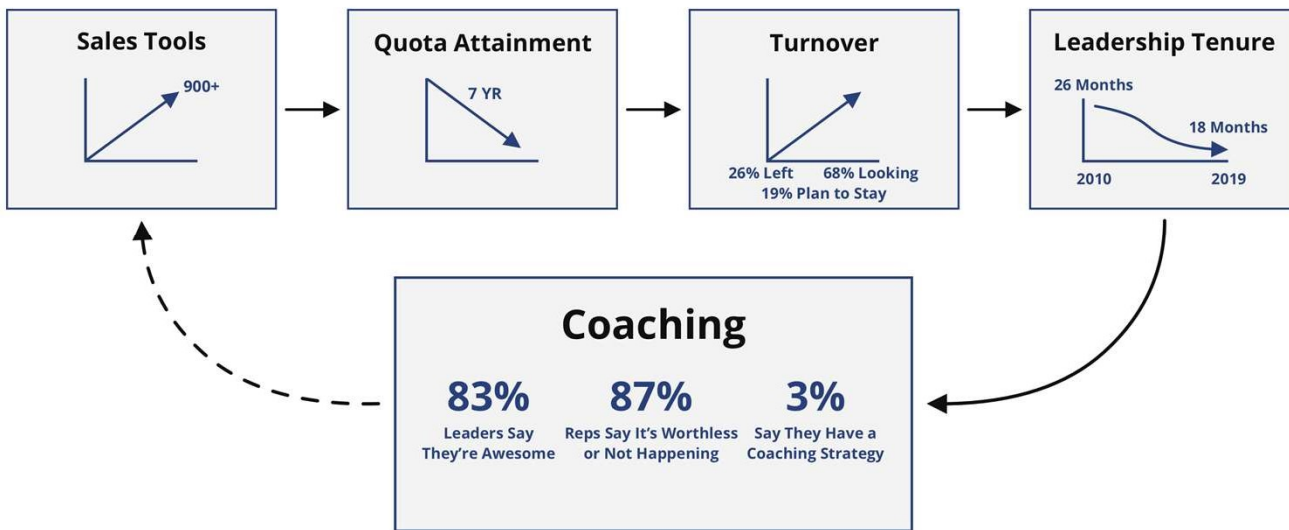
89%

86%

*A Sales Guy, 2018

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The Sales Leadership Crisis is a Reality for Every Team



Why it is Important to Get Coaching RIGHT

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PRODUCTION

25%

Increase in Total Sales



PRODUCTIVITY

20%

Increase in % of
Salespeople Hitting
Goal



ADOPTION

95%

Increase in number of
Activities and Events
logged in Salesforce



RETENTION

20%

Increase in
Salesperson
Retention



WIN RATE

28%

Increase in Win Rate



Brad Cea

Area Sales Director

Brad.cea@wm.com



About Waste Management



3000 Salesforce Users

North-American Sales Teams:

Municipalities

National Accounts

Business Sales

Construction



Salesforce User Since _____

Standardize the Sales Process

Single Sales Process for all teams

“WM Way of Selling.”



“Doing Good”

World’s Most Admired Companies

100 Best Corporate Citizens

Best Employer for Veterans

World’s Greenest Companies

World’s Most Ethical Companies

Sales at Waste Management

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SSDO for Sales in 2016

- 3000 salespeople with a single sales process
- Extremely successful initiative

Needed SSDO for Managers

- 400+ managers

How do we have every salesperson experience coaching in a way that:

- Supports current company objectives?
- Creates predictable impact?
- The reps actually enjoy and appreciate?



Coaching at WM

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Had to be in Salesforce

3 areas of emphasis:

- Opportunity Management
- Performance Management
- Career Development
 - “Last job you’ll ever take”

Create individual plans for each rep

- No “Spreadsheet Coaching”

Wanted to measure responsiveness to coaching and coaching impact.



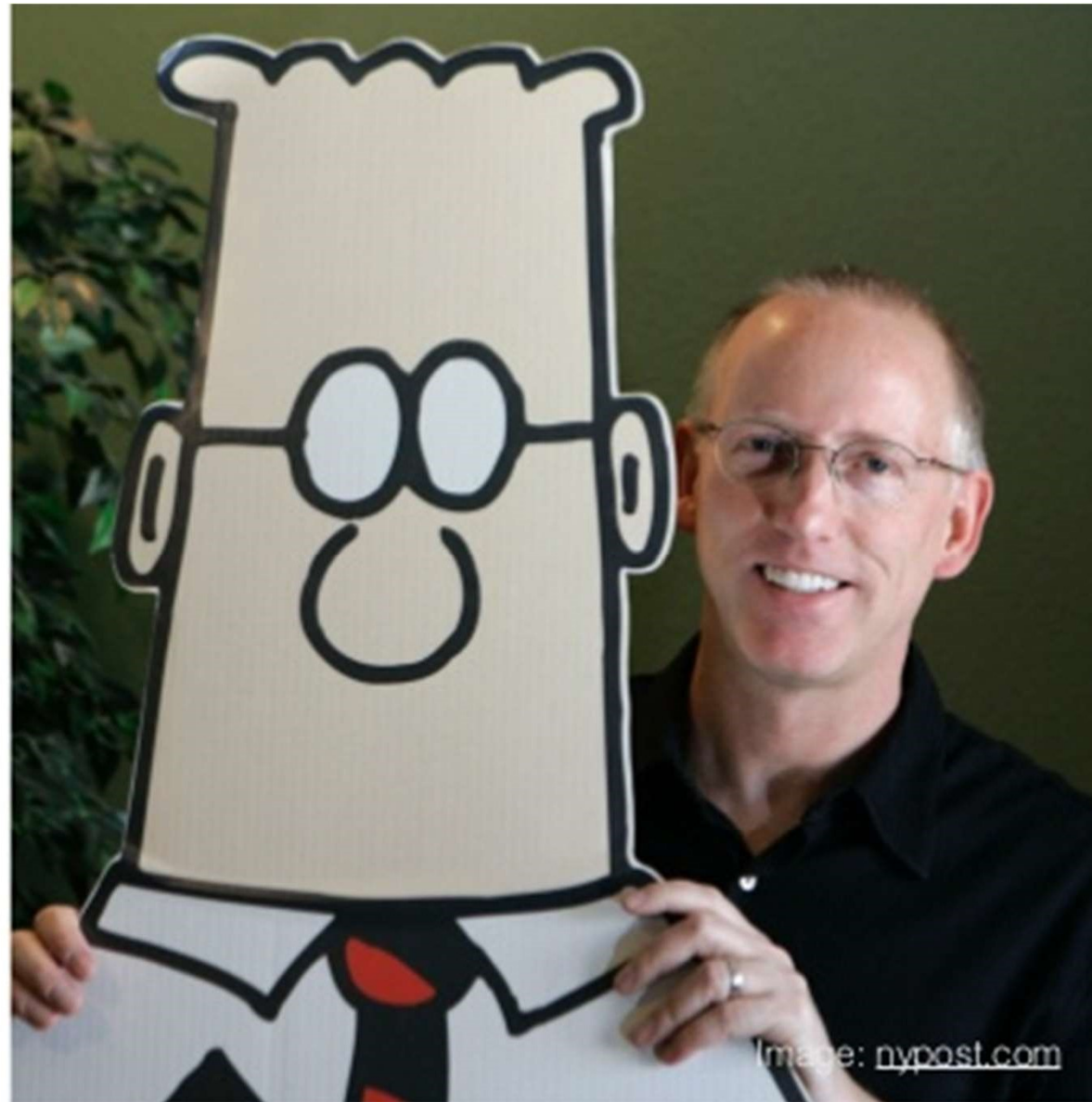
xvoyant



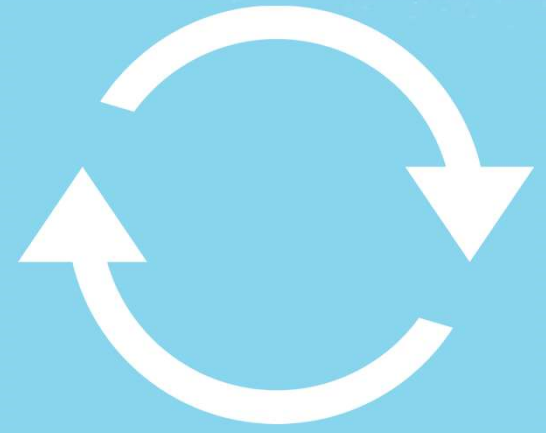
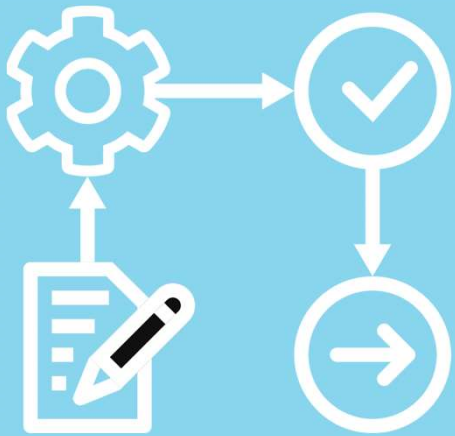
"Losers have goals, and winners have systems."



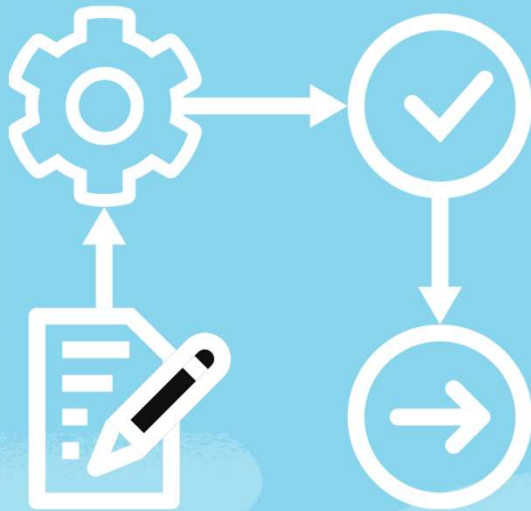
-Scott Adams,
Creator of Dilbert



Components of the **WM** Coaching System



1. COACHING PROCESS



Building Blocks of Coaching at WM

Frequency:

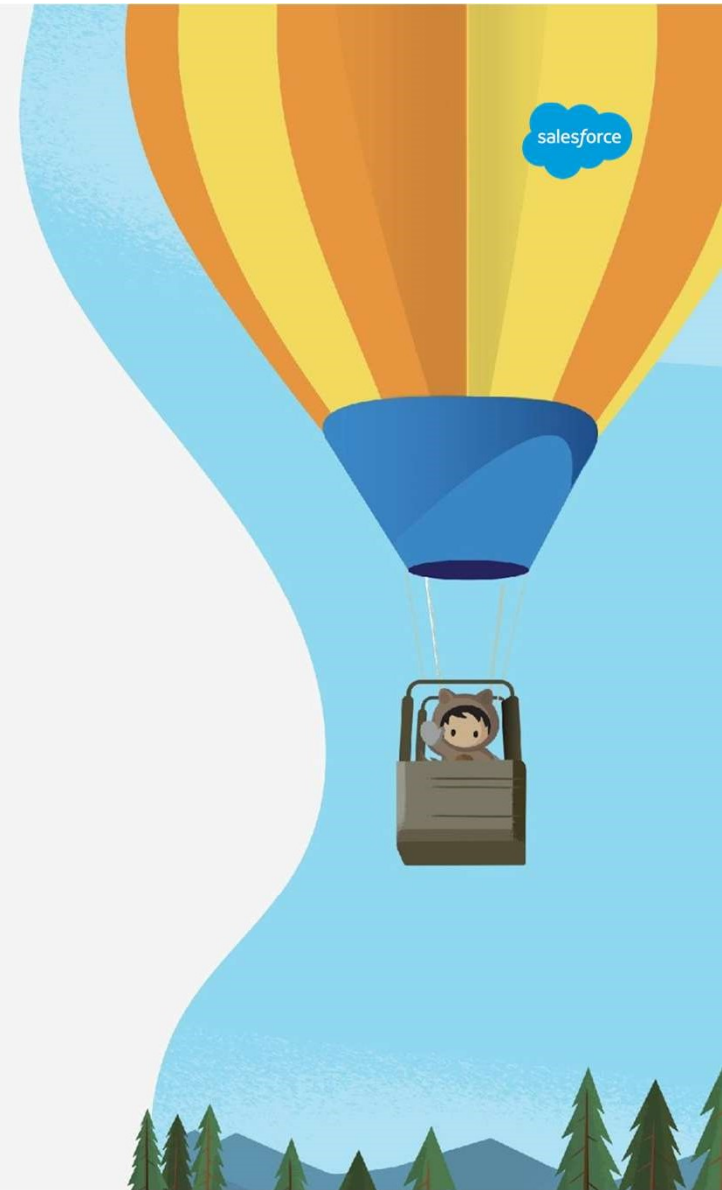
- Every WM Rep has a formal 1:1 at least monthly.
- Regardless of performance level.

Focus:

- 100% focused on development of salesperson.
- Future-Oriented
 - Not an accounting of past activities.
 - Strategic planning session
 - “What’s Next” mentality

Foundation:

- Established agendas
- All Data from Salesforce
- “No Ambushing with Data”
- Expectation to set coaching goals
- Empowerment



xvoyant v3.16

114- [Redacted]

November 2019

27	28	29	30	31	1	2
	👤	👤	👤	👤	👤	
3	4	5	6	7	8	9
👤	👤	👤	👤	👤	👤	
10	11	12	13	14	15	16
👤	👤	👤	👤	👤	👤	👤
17	18	19	20	21	22	23
	👤	👤	👤		👤	👤
24	25	26	27	28	29	30
					👤	👤
1	2	3	4	5	6	7
👤	👤			👤	👤	👤

Upcoming Coaching Sessions

Team Member	Goal
[Redacted]	New Recycling Re
[Redacted]	Increased Events
[Redacted]	Increased Opport
[Redacted]	Commercial Avg
[Redacted]	Improve Sales Ve

Needs a Session

Team Member	Last Session
[Redacted]	334 days
[Redacted]	249 days
[Redacted]	249 days
[Redacted]	249 days
[Redacted]	249 days

SCHEDULE SESSION

COMMIT to Coaching

9/23/2019 - [Redacted]

#1. Discussion Topics

General one on one topics with focus of transition from TM to AM

#2. Strengths

Very strong pipeline of sold/presold

#3. Opportunities

Continue to focus on all metrics as they pertain to retention SSDO

#4. Action Items for Coachee

continue to focus on transition to AM

#5. Action Items for Coach

#6. Next Steps / Close

SAVE **CANCEL** Delete + New Coaching Goal 📅 Schedule 1:1

A Coaching Process Creates Expectancy



Coachability Matters

Coaching Goals

Operationalize Playbooks

What we Measure

Why we have 1:1s

1:1 Frequency

Continuous Improvement

1:1 Focus Points

Path to YOUR goals

Why Metrics Matter

100% Rep-Focused

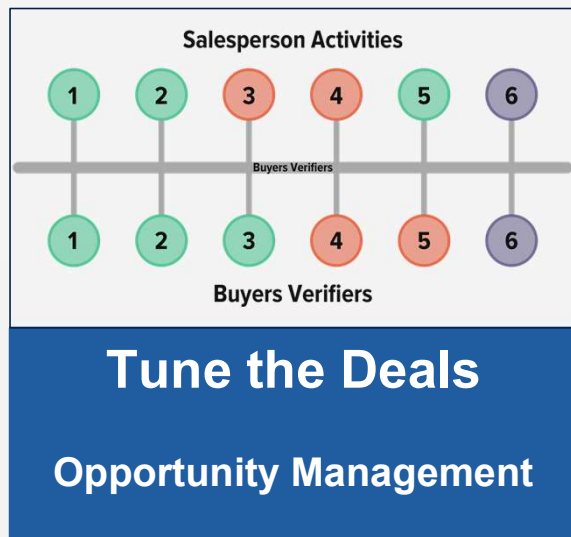
The Salesforce logo, consisting of the word "salesforce" in white lowercase letters inside a blue cloud-like shape.

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2. INDIVIDUALIZATION



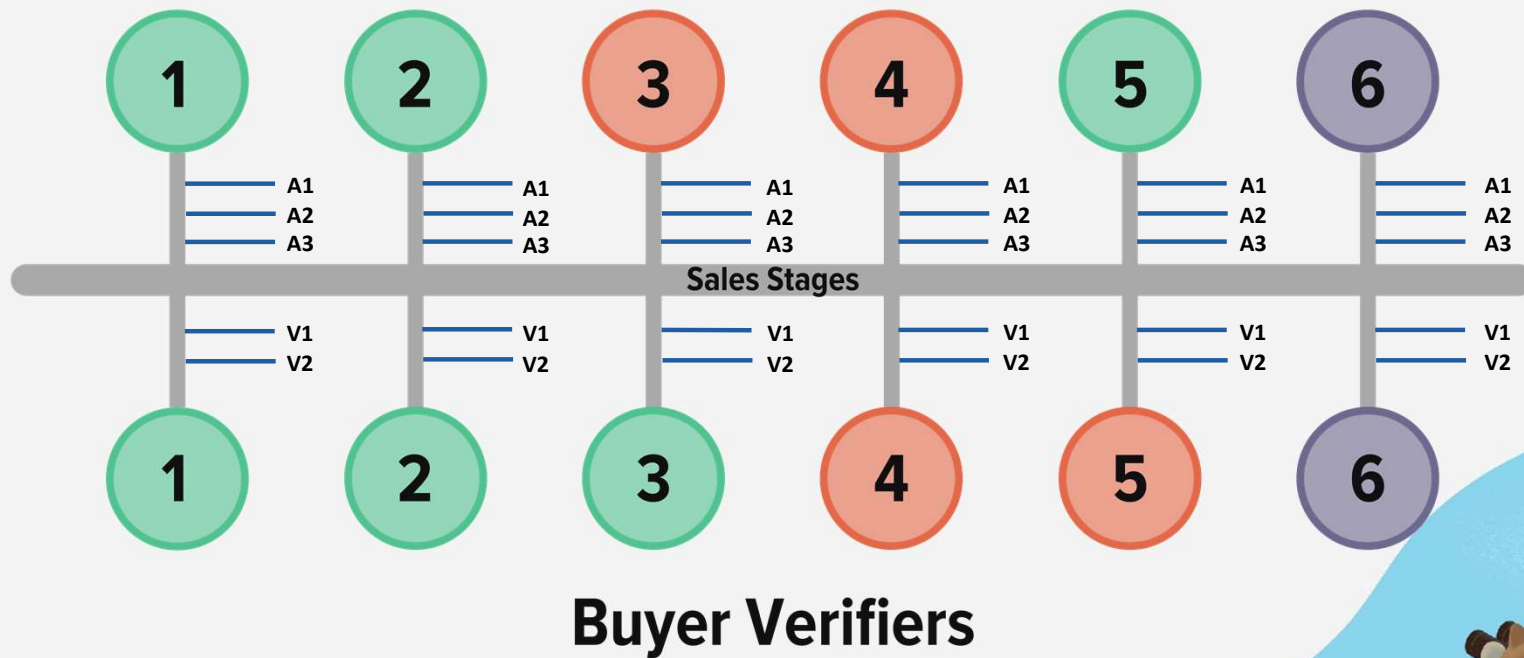
2 Ways Great Leaders Use Coaching to Empower Reps



Sales Engagement MUST Create Buyer Engagement



Salesperson Activities





[Back to Scorecard](#)

[EDIT OPPORTUNITY](#)

[LOG A CALL](#)

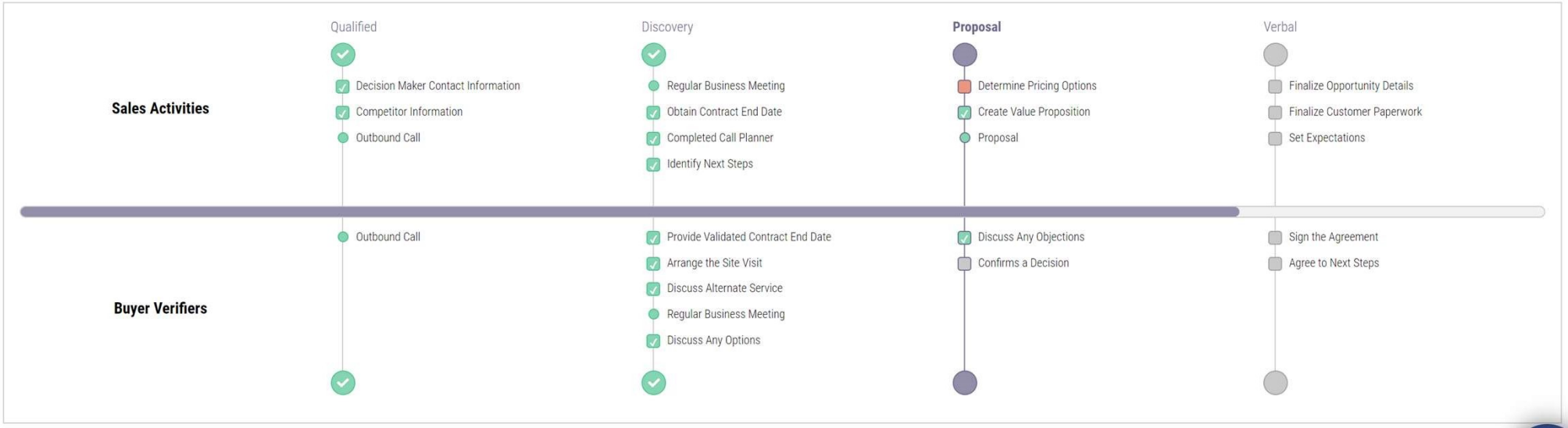
[VIEW IN SALESFORCE](#)

[+ NEW COACHING GOAL](#)

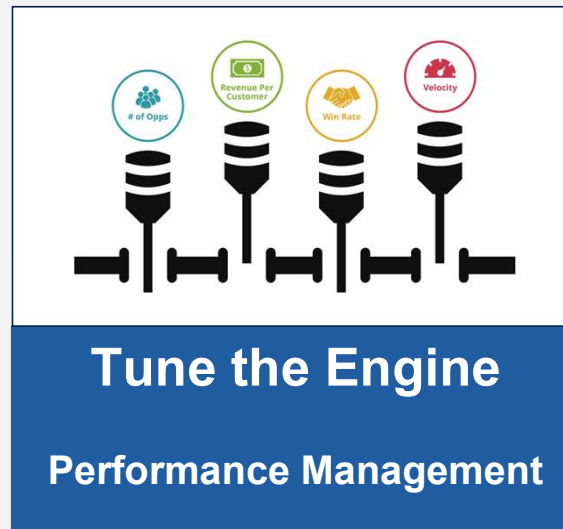
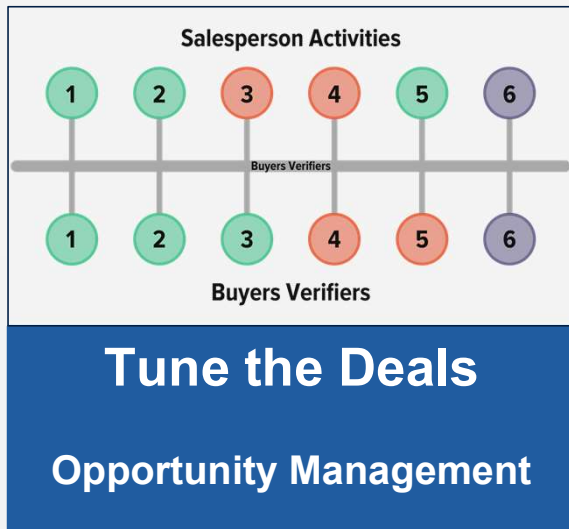
[SAVE](#)

[CANCEL](#)

Activity / Verifiers Analysis



2 Ways Great Leaders Use Coaching to Empower Reps



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Where do we go from here?

Choose Analysis: Active Goal Next 12 Months

Set Increases

[Edit current baseline values](#)

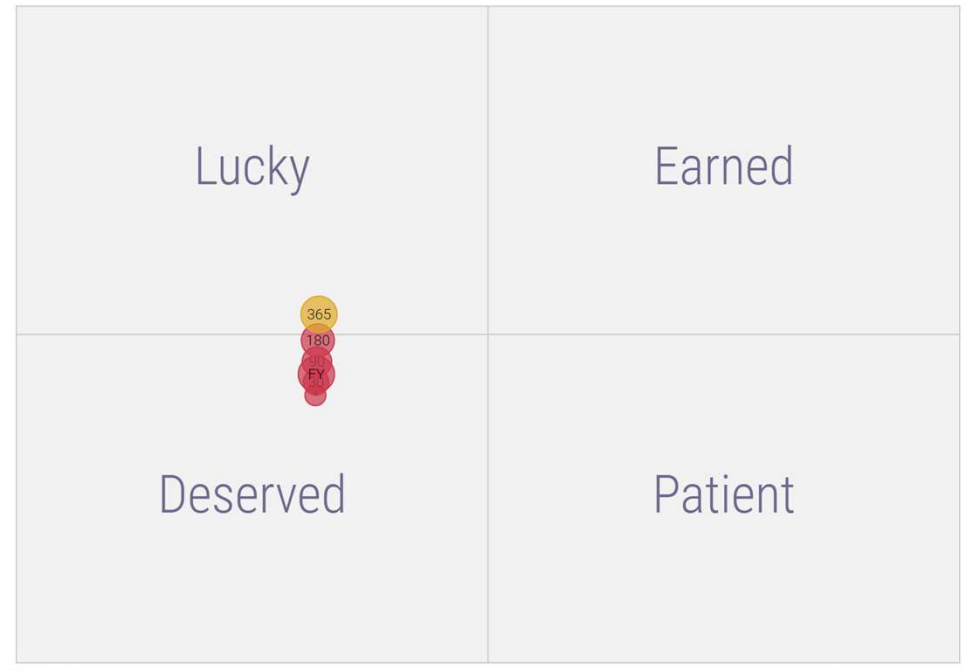
	Current	Predicted	
Avg # starts/month	3.2 + 56 %	= 5	<input type="range"/>
Avg deal size in \$	285.7 + 0 %	= \$285.7	<input type="range"/>
Win Rate	60% + 0 %	= 60 %	<input type="range"/>
Velocity	15.6 - 0 %	= 15.6	<input type="range"/>
Change 56%		Increase (FY) \$693	

Sales Distribution



+ NEW COACHING GOAL

Process vs Outcomes



Individualization Creates Empowerment



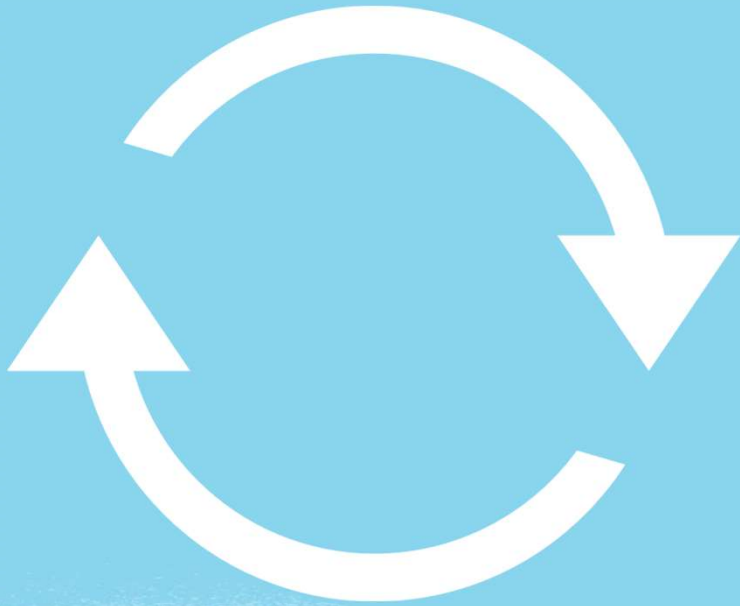
Set a Coaching Goal as part of every 1:1

- Activity
- Skill
- Resources

Get ___% Better Intentionally



3. CONSISTENCY



Role of Coaching:

Create “New Normals” with Every Single Rep

Key Learning in the **WM** Coaching Journey:

Measure Coachability to Create Accountability



xvoyant v3.16

114-FL: [redacted] > 114-FL: [redacted] > All > [redacted]

Overview



Sales Goal



Active Coaching Goals

- MPU/HOC** 12 of 5
11/5/2019 - 11/29/2019 ✓ Achieved
- Take action 5** In progress
10/22/2019 - 11/21/2019 Accepted

Completed Goals

- New Business** ✓ Achieved
7/5/2019 - 7/31/2019
- Secure Rate** ✓ Achieved
6/7/2019 - 7/31/2019
- 5/14 - BAC** 63 of 46 ✓ Achieved
5/14/2019 - 5/21/2019
- 4/23 - BAC** 30 of 28 ✓ Achieved
4/23/2019 - 5/6/2019
- 4/16 - Customer Events** 0 of 10

xvoyant v3.16 **Coaching** Team Scorecard Reports Settings ?

149- [redacted] > 149- [redacted] > All > [redacted] **APPLY**

[Empty text area for notes]

Hide note from team member **SAVE** **CLEAR**

3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
1	2	3	4	5	6	7

Scheduled 1:1s [3 icons] Coaching Goals [yellow bar] Closing Must-Win Deal

1:1 Worksheets

- October 28, 2019**
COMMIT to Coaching w/ Paul Thimmes II
View Worksheet
- September 23, 2019**
COMMIT to Coaching w/ Paul Thimmes II
View Worksheet
- September 16, 2019**
AM Template w/ Paul Thimmes II
View Worksheet
- August 26, 2019**
COMMIT to Coaching w/ Paul Thimmes II
View Worksheet
- April 19, 2019**
COMMIT to Coaching w/ Paul Thimmes II
View Worksheet
- View All Worksheets

View Past Coach [redacted]

+

Coachability and Discretionary Leadership Time



All Reps have a regular 1:1.

Discretionary time is allocated to Reps that respond to coaching.

Consistency in 1:1s and coaching goals is the fuel for individual transformation.



Impact in Metrics that Matter

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>12,500

Wins with Coaching
Goals

28%

Lift in Win Rate on
Coached Deals

>\$60,000,000

Revenue on Coached
Deals

85%

Company-Wide
Coachability Score

29%

Improvement to
average Pipeline Value

21%

Increase in # of reps
hitting goal

41%

Increase in
Revenue per Rep

11%

Improvement in Rep
Retention

95%

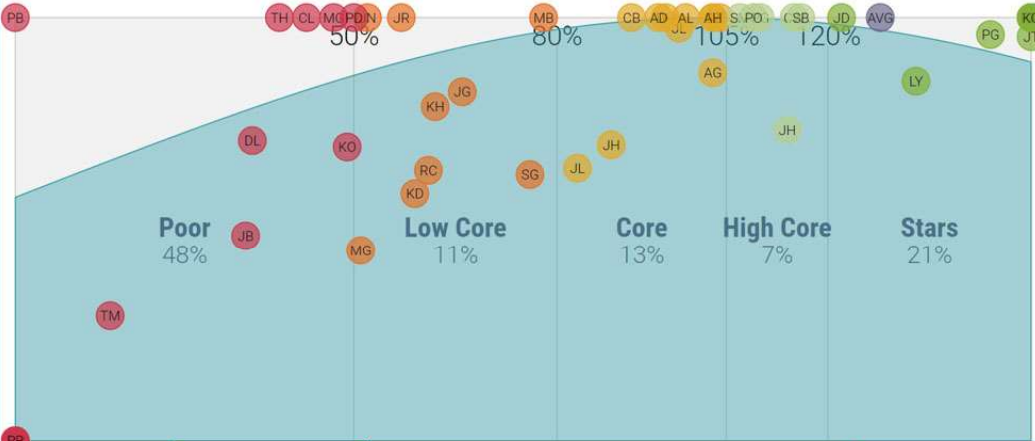
Increase in SFDC use
when coached

Shift is Happening Across the WM Enterprise



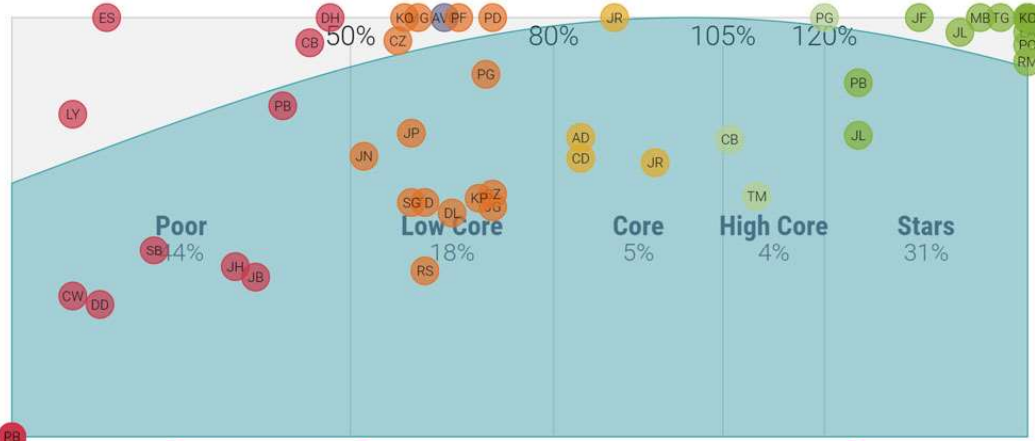
Team A

Sales Distribution (08/31/2018)



	Poor	Low Core	Core	High Core	Stars
# of Reps	41	9	11	6	18

Sales Distribution (08/31/2019)



	Poor	Low Core	Core	High Core	Stars
# of Reps	37	15 (▲6)	4 (▼7)	3 (▼3)	26

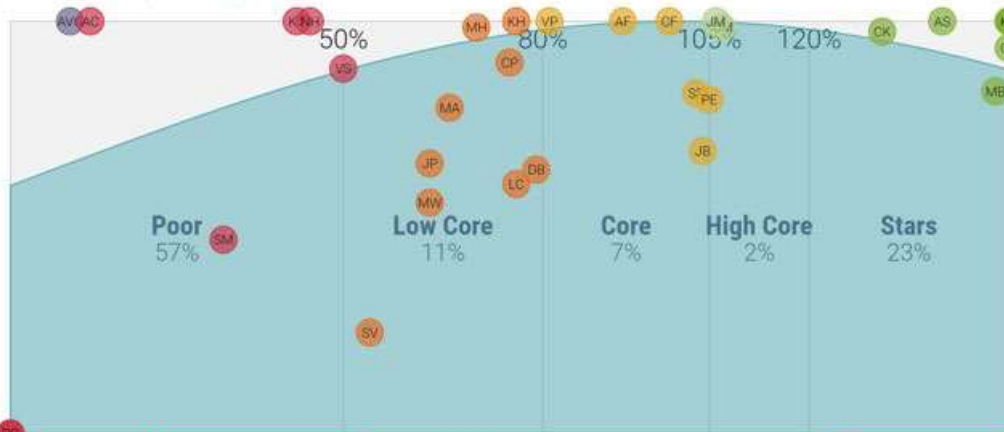


Shift Happening with No New People or Training



Team B

Sales Distribution (08/31/2018)



# of Reps	Poor	Low Core	Core	High Core	Stars
	47	9	6	2	19

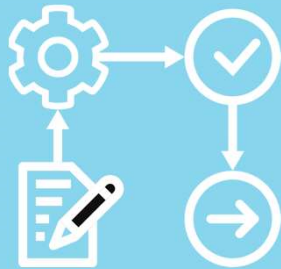
Sales Distribution (08/31/2019)



# of Reps	Poor	Low Core	Core	High Core	Stars
	23	6 (▲7)	4 (▼2)	1 (▼1)	39

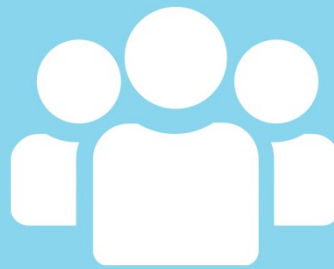


A Blueprint to Build YOUR Dynasty



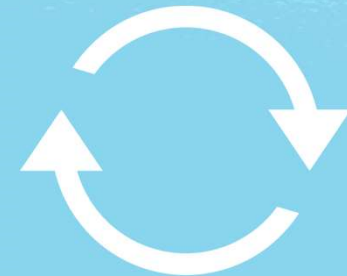
PROCESS

Create
EXPECTANCY



INDIVIDUALIZATION

Create
EMPOWERMENT



CONSISTENCY

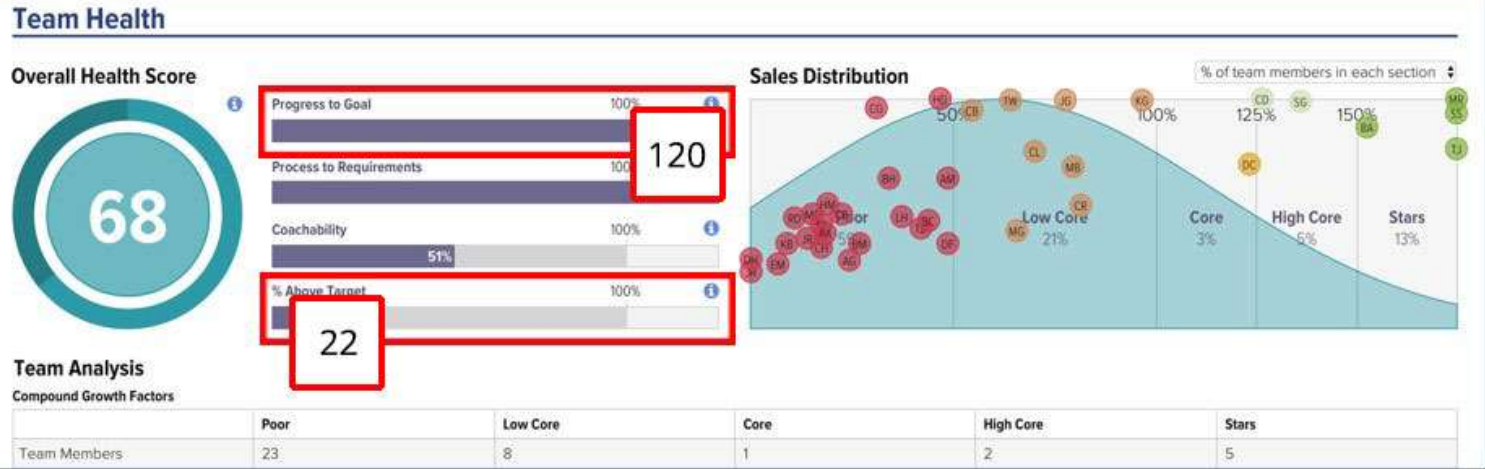
Create
NEW NORMALS

All in Salesforce.

No New People, Tools or Training...Just New Normals

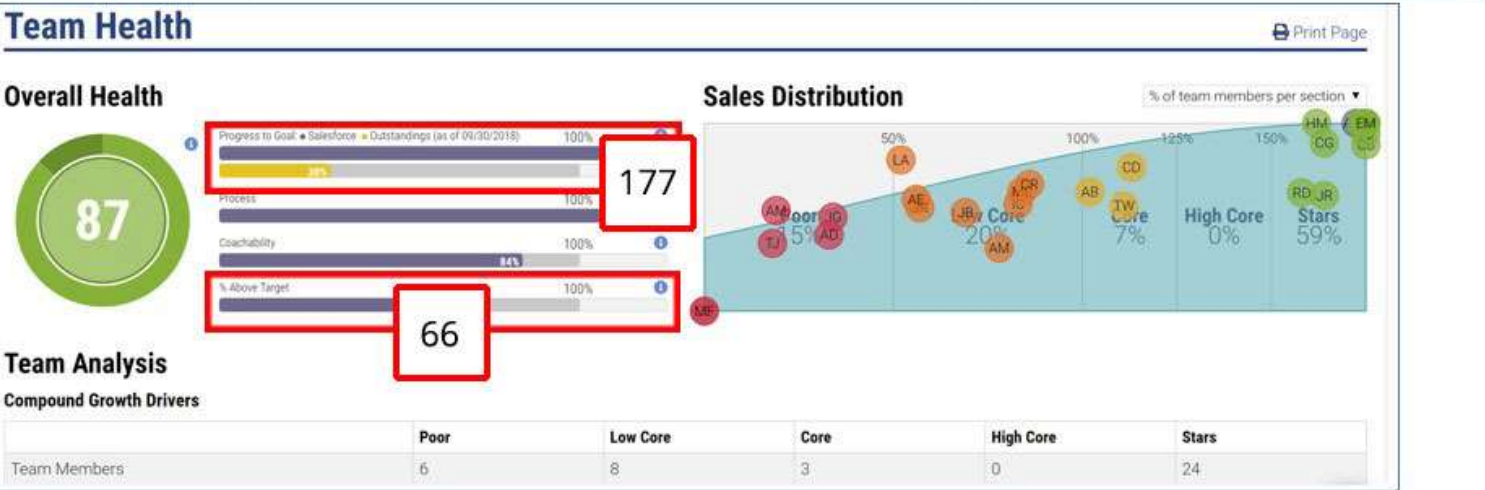
FROM THIS:

- 31 Dec 2017
- 22% Reps Achieving Goal
- 120% of Sales Goal
- 59% in Poor Category



TO THIS:

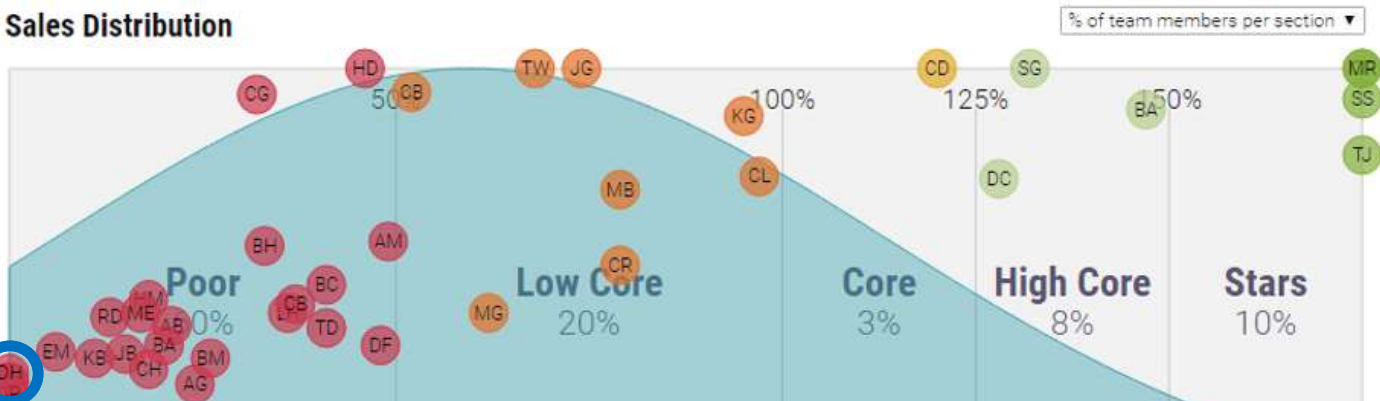
- 14 Dec 2018
- 66% Reps Achieving Goal
- 72% of Sales Goal
- 15% in Poor Category



Why Great 1:1's Really Matter...



Sales Distribution



Sales Distribution

