

# THE COMPLETE SALES KPI STRATEGY GUIDE

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For Sales Development Teams

# Do you ever feel like you're not selling enough, especially in comparison to your investment in CRM and your sales team?

Sales activity management helps sales teams unlock maximum revenue potential by engaging salespeople in the behaviors that matter.

In our [first Sales KPI Report](#), we analyzed 1,500+ sales activities that are being used to manage and motivate 100+ sales teams. Now, we're presenting you with a complete guide to launching your sales activity management strategy based on our sales KPI research and catered to your specific type of sales team.

## WHAT YOU'LL FIND IN THIS GUIDE:

1. Today's Sales Development Rep

2. Most Common Sales Development KPIs

3. Expert Recommendations

4. Interesting KPIs

5. KPI Timeframes

6. The Activity Based Selling Methodology

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that section!



### About LevelEleven

LevelEleven is for sales leaders who want to sell more. We have the industry's leading sales activity management system, which lives right within Salesforce and unlocks maximum revenue potential for companies including Paycor, Ryerson and Comcast. LevelEleven engages a sales team in the behaviors that matter, allows managers to course correct in real time and creates a true culture of performance.

[learn more here](#)

Just to ensure we're on the same page about the role this guide is addressing, here is our basic definition of a sales development rep...

## TODAY'S SALES DEVELOPMENT REP

A sales development rep is a typically non-quota carrying salesperson whose job is to set up qualified sales opportunities for the sales team. Usually, these are people who are aspiring to get into sales, account management or another customer-facing role. Generally, they work inside on the phone or computer. They make a high volume of calls and emails, but they really understand the ideal customer profile and how to pursue those prospects.

If you specialize your sales development team, you probably have these two groups:

**INBOUND:** Reps react to inbound leads that come in from demo requests, content downloads, referrals and other lead sources.

**OUTBOUND:** Reps prospect opportunities by targeting a very specific type of buyer and generating interest mainly via calls, emails or social media.

## MOST COMMON SALES DEVELOPMENT KPIS

This chart shows the most common sales KPIs used by sales development teams. *Calls* takes the top spot with 29%, followed by *Meetings Scheduled* (13%) and *Emails Sent* (12%).

KPI	% of Sales Teams Using this KPI	KPI	% of Sales Teams Using this KPI
Calls	29%	Demos Completed	7%
Meetings Scheduled	13%	Meetings	5%
Emails Sent	12%	SQLs	5%
Opportunities Created	9%	Contacts Added	4%
Activities	9%	Conversations	4%
Connects	9%	Dials	4%
Wins	7%		

# Leading vs. Lagging

During your KPI discovery process, it's important to distinguish between leading and lagging indicators:

## LAGGING INDICATORS

They track how you're doing, but only in terms of what has already happened (and are, therefore, not real time).

Some examples include *Wins*, *Close Rate*, *Deal Size* and *Sales Cycle Length*.

## LEADING INDICATORS

They are controllable behaviors that show you what's happening right now and whether you're on pace to hit your goal.

Examples include *Calls*, *Meetings* and *Proposals Sent*.

For example: *Deal Size* is a lagging indicator. It's not a controllable behavior.

But there are leading indicators that would improve the likelihood of increasing that deal size metric, like VP-level conversations, ROI discussions and prospecting into larger companies. If increasing your deal size is a key company goal, then you'll want to consider establishing leading indicators that align with it, such as those referenced above.

### TIP

A great best practice is to focus on 3 leading indicators and 1 lagging indicator as your team's main KPIs.

# EXPERT SALES DEVELOPMENT RECOMMENDATIONS

Our research revealed that sales development teams should start with these four KPIs as their main focus:

<b>1</b> Calls 	<b>2</b> Conversations 
<i>Calls made to leads.</i>	<i>Connecting with leads for conversations.</i>
<b>3</b> Meetings Scheduled 	<b>4</b> Sales Accepted Opportunities 
<i>Meetings scheduled for sales reps.</i>	<i>Opportunities accepted by sales reps.</i>

**Note:** One important KPI to note here is *Sales Accepted Opportunity*. This measures the amount of quality opportunities the SDR has brought to the sales team. SDRs are only awarded points toward this KPI when a sales rep marks an opportunity as accepted. If the sales rep doesn't accept the lead for some reason (wrong timing, no budget, etc.), then the SDR does not get credit because they did not qualify the opportunity thoroughly.



# Sales Development Expert Spotlight

We asked sales development experts across various industries and organizational structures what they would recommend for teams just starting out with sales KPIs.

## Expert Advice:

*DocSend Director of Sales Ryan O'Connor says that SDR daily activities can get very, very noisy. They have a mountain of leads to parse through, so you want to make sure they're focusing on the right things. He recommends these metrics for SDR teams getting started with KPIs.*

Calls

Emails Sent

Meetings Scheduled

## INTERESTING KPIs

### Need more KPI ideas?

Here's a list of the unique and interesting KPIs we discovered sales development leaders using:

Assessment Scheduled

Demos Scheduled

Talk Time

Upgrade Opps Created

4+ Minute Conversations

### TIP

The great thing about KPIs is you can adjust to them to align with your current initiatives. Are your SDRs getting leads but not following up? Make a KPI for *First-Time Connects*. What about if your SDRs are only contacting someone once and then never again? Develop a KPI for *Prospects Contacted 3 or More Times*.

# SALES DEVELOPMENT KPI TIMEFRAMES

Perhaps just as important as what you're measuring is how often you're measuring it.

Below are the most popular timeframes for the most common KPIs of sales development teams. SDRs are most often measured on a daily basis, but some teams prefer to manage things like *Calls* and *Meetings* on a weekly basis.

SALES DEVELOPMENT				
	Daily	Weekly	Monthly	Quarterly
Wins	55%	41%	5%	0%
Calls	10%	60%	30%	0%
Opportunities Created	56%	44%	0%	0%
Meetings	0%	71%	29%	0%
Demos Completed	43%	29%	29%	0%

Now that you have the data, here's how to implement it in a way that will accelerate revenue...

## THE ACTIVITY BASED SELLING METHODOLOGY

Activity Based Selling is built off the premise that sales is a cascading chain of controllable behaviors that lead to a defined outcome.

Salespeople and sales managers often get lost in day-to-day distractions, which results in missing the fundamental actions that drive long-term results (e.g., live conversations, creating quality opportunities). While companies have historically only monitored lagging metrics (e.g., close rates, deal sizes, quota attainment), and steps within the sales pipeline, there is a need to monitor and manage the activities that lead to sales using technology that already exists. This helps sales leaders unlock maximum revenue potential by engaging salespeople in the activities that matter and creating a culture of performance.

We've broken down the KPI management process into four simple steps:

1

Define



2

Align



3

Calibrate



4

Accelerate



## 1. *Define* your key sales metrics.

- Define your sales organization's structure.
- Develop your own hypothesis of the right metrics & activities for sales reps.
- Interview salespeople, managers and executives to see what they think are the right metrics.
- Identify metrics vs. activities vs. process.
- Assess CRM readiness and adjust as needed.
- Define weighting across key activities to enable a composite score for SDRs.

### Expert Advice:

*"I tell sales leaders to have 3-5 KPIs tops. There's such a bias or inclination or gut reaction toward measuring this and that and the other thing, and suddenly the list becomes 8-10 things. And you can't focus on all of those. The key to making the whole introduction and maintenance of KPIs successful is having the right number of them."*

**- EVERETT HILL, PRESIDENT, CATALYTIC ADVISORS**

## 2. *Align* your sales organization.

- Review operating metrics with sales managers for buy-in.
- Develop personalized scorecards for salespeople and managers.
- Create buy-in by reviewing metrics with salespeople and discussing how it helps manage their business.
- Display performance metrics publicly.
- Review daily and weekly progress to date and pacing to goal.

### Expert Advice:

*"Expectations, goals and quotas need to be set before you roll out KPIs. Everybody knows their expectations, goals and quotas, as well as when they're going to be reviewed. If they understand that in roll-out, I've found that it makes that a lot easier."*

**- ALI CHOINIÈRE, DIRECTOR OF INSIDE SALES, FREIGHTCENTER**

### 3. **Monitor** and course correct.

- Inspire collaboration via accessible stack rankings.
- Run consistent one-on-ones using objective data as your guide.
- Ensure managers monitor KPIs daily to course correct where the team is falling behind and celebrate success.
- Use contests/incentives to rally the team around lifting a metric, or for a special initiative.
- Assess data monthly/quarterly to identify any goal misalignment, and adjust as needed.

#### Expert Advice:

*“You need to be able to measure the KPIs you choose, meaning the data must actually be available and accessible. Each employee should be able to track their own progress, and management should be monitoring them for weekly, monthly and quarterly progress. This should lead to coaching opportunities that will ensure that the appropriate praise or corrective measures are taken in the near term instead of finding out you have issues too late.”*

**- DARREN SUOMI, SVP OF GLOBAL SALES, VIDYARD**

### 4. **Grow** from a strong foundation.

- Use composite scoring to uncover best practices from the top 20% of your sales team, focus coaching on the middle 60% and train or remove the bottom 20%.
- Invest in training and technology to increase the output of individual activities.
- Hire and onboard salespeople against your established metrics to accelerate time to ramp.
- Hire sales managers who are capable of leading a modern sales organization.

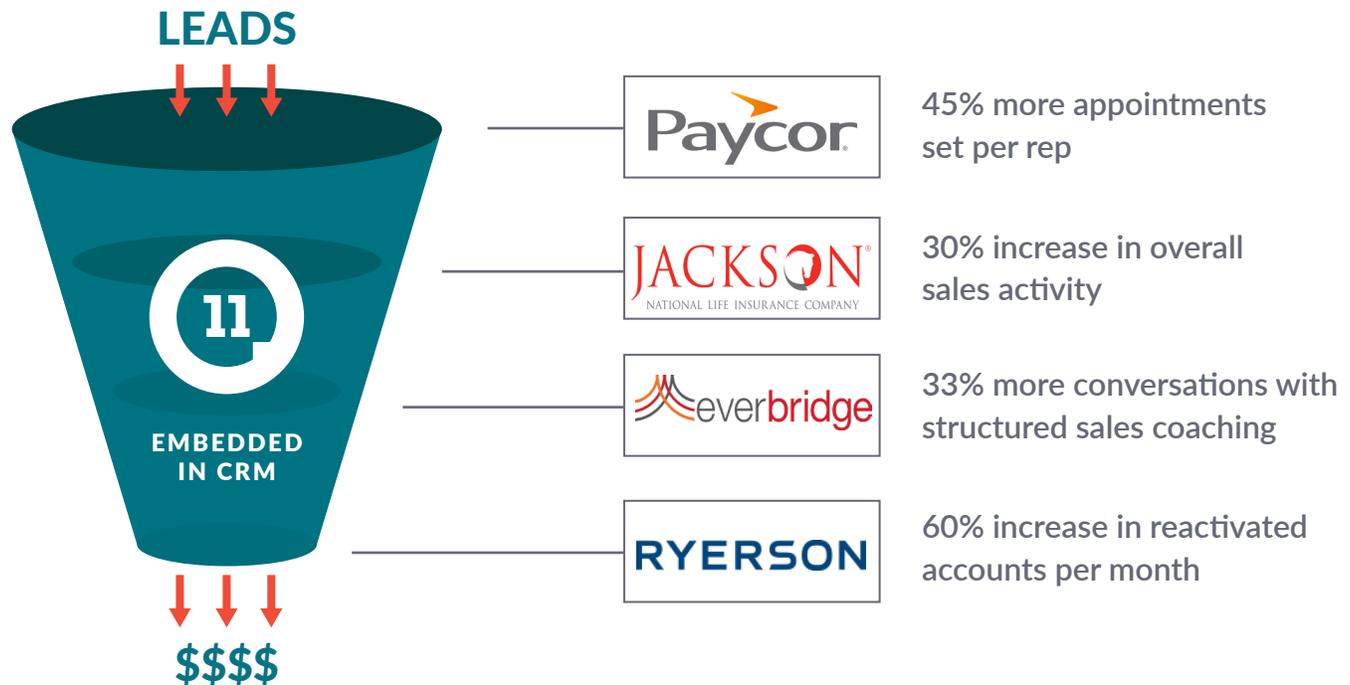
#### Expert Advice:

*“As the sales leader, you are keeping a close eye on the impact of each activity. If you’re not in the trenches, you are removed and need to make sure that you can course correct whenever necessary. If you’re finding that your leading sales reps are all excelling in one KPI more than another, adjust. Your team will love you for it.”*

**- MATT LOPEZ, VP OF SALES, SKALED**

# Ready to Step Up Your Sales Activity Management Strategy?

With LevelEleven....



*"We've seen a massive spike in activity and focus ... we're on pace to have more activity in 2016 than we did in 2015, with a smaller team."*

**DOUG MANTELLI**, SVP of National Sales Development, Jackson

## Special Offer for Readers of this Study

### Free KPI Discovery Call

Talk to one of our sales performance experts for a free 1-hour session on identifying your team's main KPIs. Just click here and include "Free KPI Discovery" in the message box.

Already know what your team's critical KPIs are and ready to talk about managing and motivating them? **Request a demo.**