

Top Sales Operations Strategies During COVID-19



Introduction

Like every other role, Sales Operations has been affected by COVID-19. In fact, Sales Operations has become more essential in helping plan and set a future course for their organizations. To understand in what ways teams are adjusting, we convened a roundtable with Sales Operations leaders:



[Priyanka Agarwal](#), Head of Sales and Account Operations at Resolve Tech Solutions



[Joel Arnold](#), Vice President of Revenue Operations at PowerReviews



[Hanna Dekker](#), Director of Sales Operations at VNDLY



[Chris Dent](#), EVP of Commercial Excellence Practice at Bain



[Shriya Ravikumar](#), Global Sales & Support Operations at Intercom



[Rosalyn Santa Elena](#), Head of Revenue Operations at Clari



[Rishi Sood](#), Former VP of Revenue Strategy & Operations at Axiom

Read on for their insights and approaches to:

- Redoing the financial forecast.
- Investing in retention vs. acquisition
- Addressing quota setting and comp on retention
- Figuring out the concession matrix
- Managing changes in top of funnel/pipeline
- Prioritizing Sales Ops in Revenue Ops
- Acting vs. planning

Pre-COVID focus for 2020

Before COVID hit, Sales Operations teams were largely focused on integrating more closely with their sales teams and reimagining the sales process.

Priorities included streamlining the pricing/product offering and deal workflow, identifying prospecting opportunities, narrowing down prospecting and ideal customer criteria, and developing a solid pipeline.

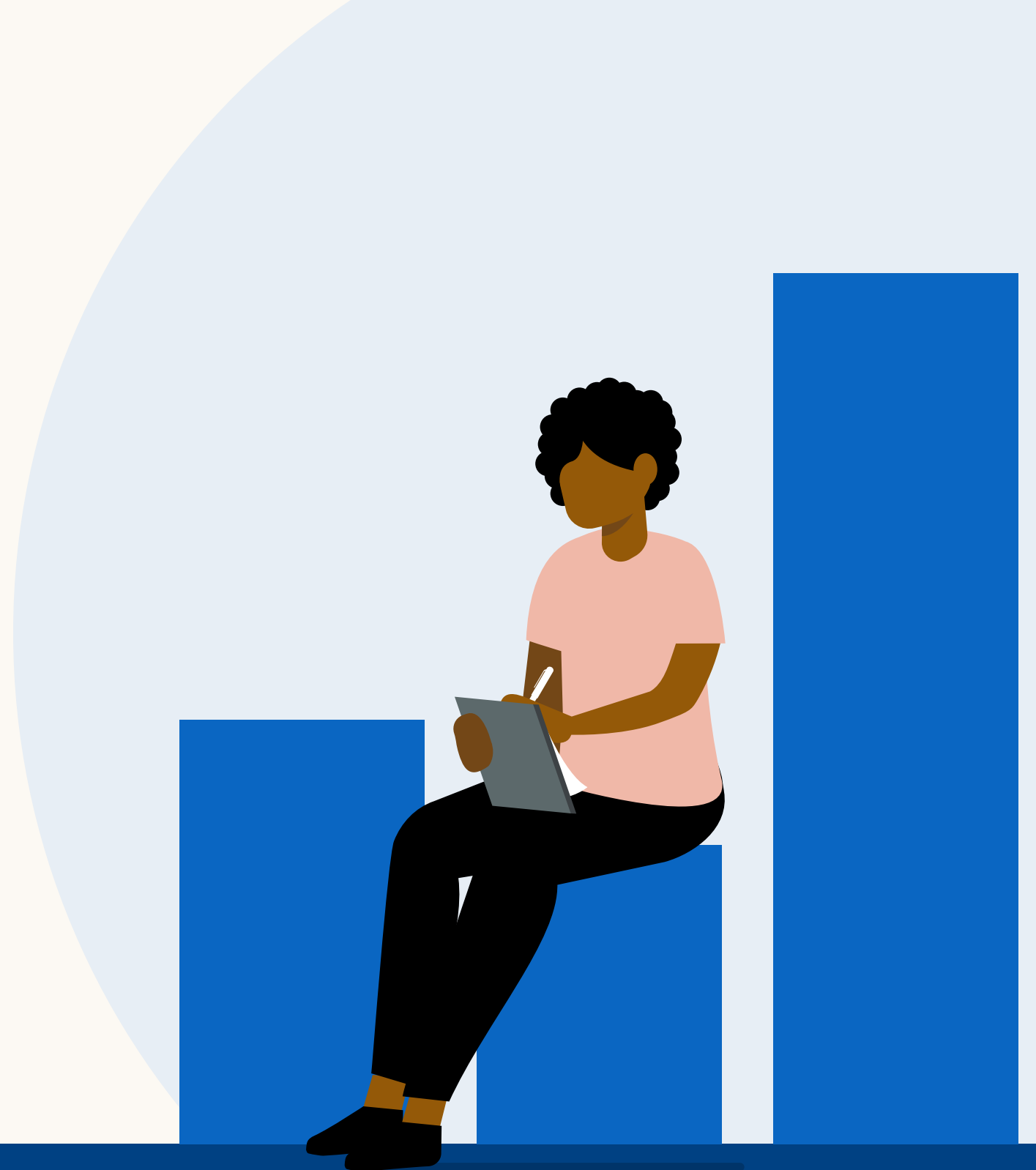


Looking forward

While the onset of the pandemic left nearly every organization scrambling, many Sales Operations and sales teams have moved beyond the “reacting to COVID” phase and are now defining COVID adaptive plans.

Not surprisingly, Sales Operations is less focused on new business and instead is hyperfocused on customer success, retention, and upselling. This makes sense considering that **47%** of buyers say they’ve been [forced to put off purchases](#) due to budget freezes. The Sales Operations shift starts with careful planning.

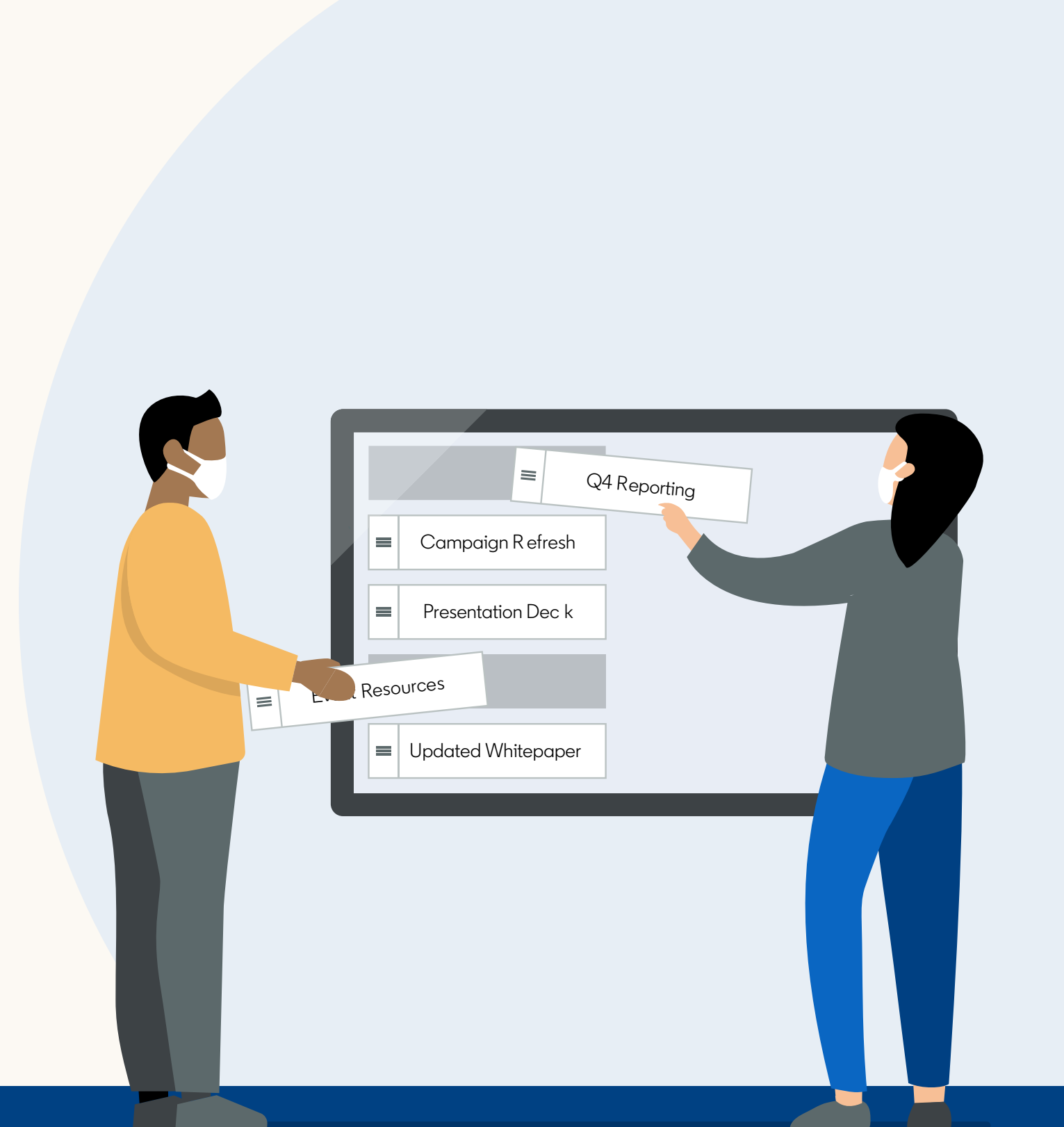
At the same time, Sales Operations must strike a careful balance to ensure it is best supporting the sales team. They are exploring new, creative ways to work with and service customers.



Looking forward

Rishi Sood formerly of Axoim shares examples. “We spend most of our time thinking about how to message differently. Where are our strengths and where are our weaknesses, and where can we double down? Since we don’t know whether things will go back to normal at the end of this year, or in March or June of next year, our next real round of planning is going to be affected as well.”

As always, Sales Operations must keep their sales “customers” in mind at all times. Priyanka Agarwal at Resolve Tech Solutions is finding a way to strike a balance. “It’s imperative to effectively capture the priorities of your projects and continually review them, especially in the current economic situation. When new items get added to the deliverables outside of scope and budget, instead of saying ‘We can’t do it,’ I’ve learned to ask, ‘How do you suggest we’re going to deliver this? What items can we take out from our current list of deliverables to accommodate these new additions?’ These kinds of questions have helped immensely in getting to a resolution and a win-win situation as we don’t want to set sales teams/clients up for failure by saying “yes” to what can’t be delivered with the given resources.”



Looking forward

Ultimately, no matter what course of action a Sales Operations team takes, it must determine its effectiveness. At this time, it's a matter of short-term measurement and rapid adjustments.

Shriya Ravikumar of Intercom shares the approach at her company: "At a company level, we aligned on a set of leading performance indicators across our GTM teams, including the thresholds that, if hit, would trigger a major shift in planning. We track these weekly, and on a rolling basis, to identify significant shifts in trends. It's allowed us to pause and dissect the key strengths in our business, and recognize areas where we can weather the storm and areas where we may need to make some hard shifts."

Sales Operations leaders are wise to consider ways to support their teams during this pressure-filled time. "I've been focused on empathy. We have to make sure we are more consciously checking in with our team, because it is easy to overload an already overloaded team," says Dekeba.



Redoing the financial forecast

When it came to budgeting last year, many Sales Operations leaders spent significant time projecting steady state—along with best case and worst case—and set their budgets early.

In the new fiscal year, they're going with the worst case since things turned out worse than projected.

After a lengthy positive economic business cycle, more and more mindshare went to acquisition and less to retention and monetization of the account book. Since this was flipped on its head in a matter of weeks, Sales Operations leaders are feeling the pressure to seriously invest in retention, making acquisition a nice tool to have.

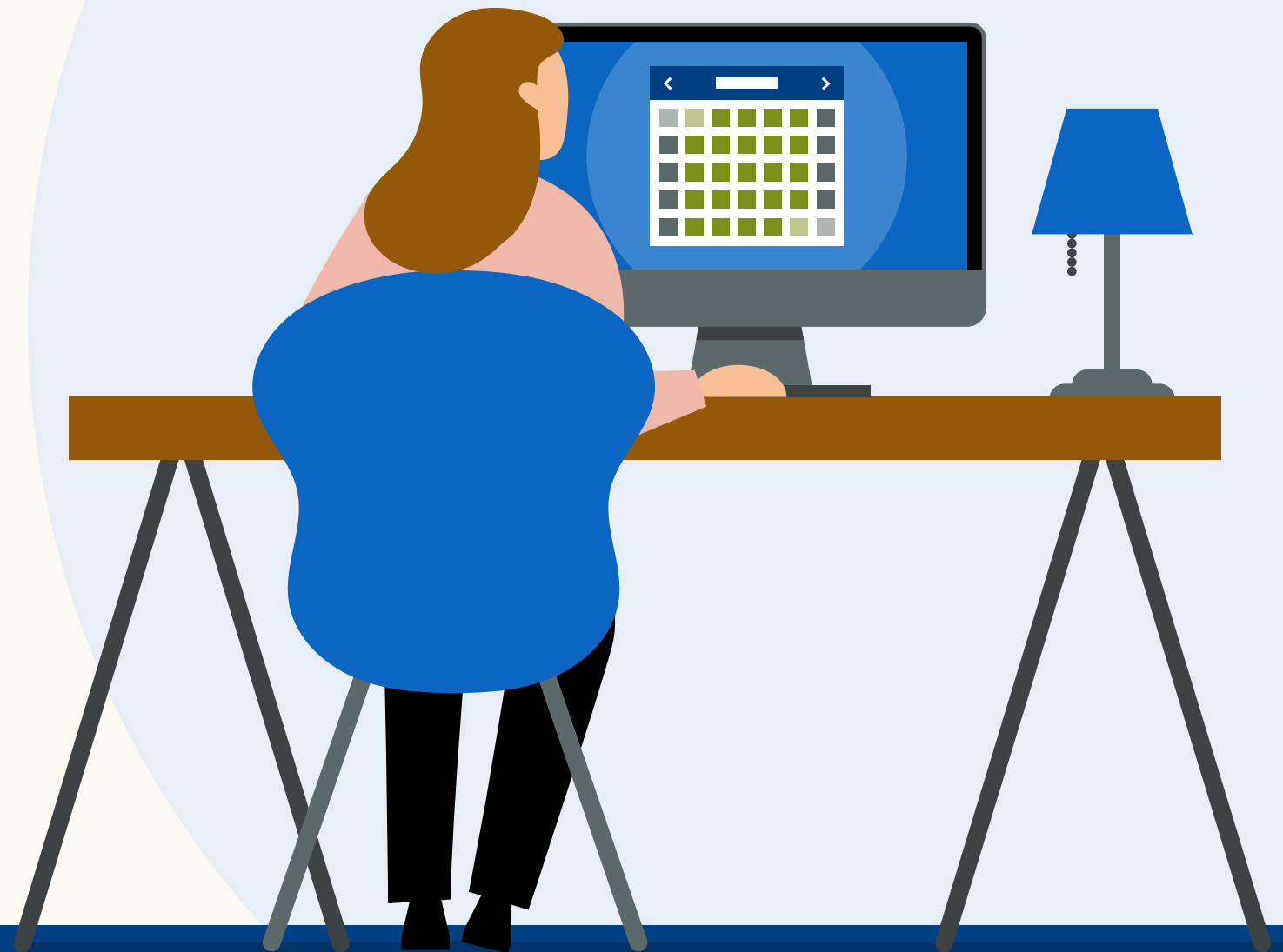


Redoing the financial forecast

“Sales quotas are going to be impacted, no matter how hard you try, because opportunities are limited since clients are also in survival mode. It’s all about surviving with what you have and going from there. We can plan as much as we want, but everything depends on how the economy turns in the next few months.”

—Priyanka Agarwal, Head of Sales and Account Operations at Resolve Tech Solutions

To that end, successful forecasting will be dependent on the ability to help refocus teams and make smart bets even in the midst of uncertainty. Rethink and reprioritize current books to make the most of them.



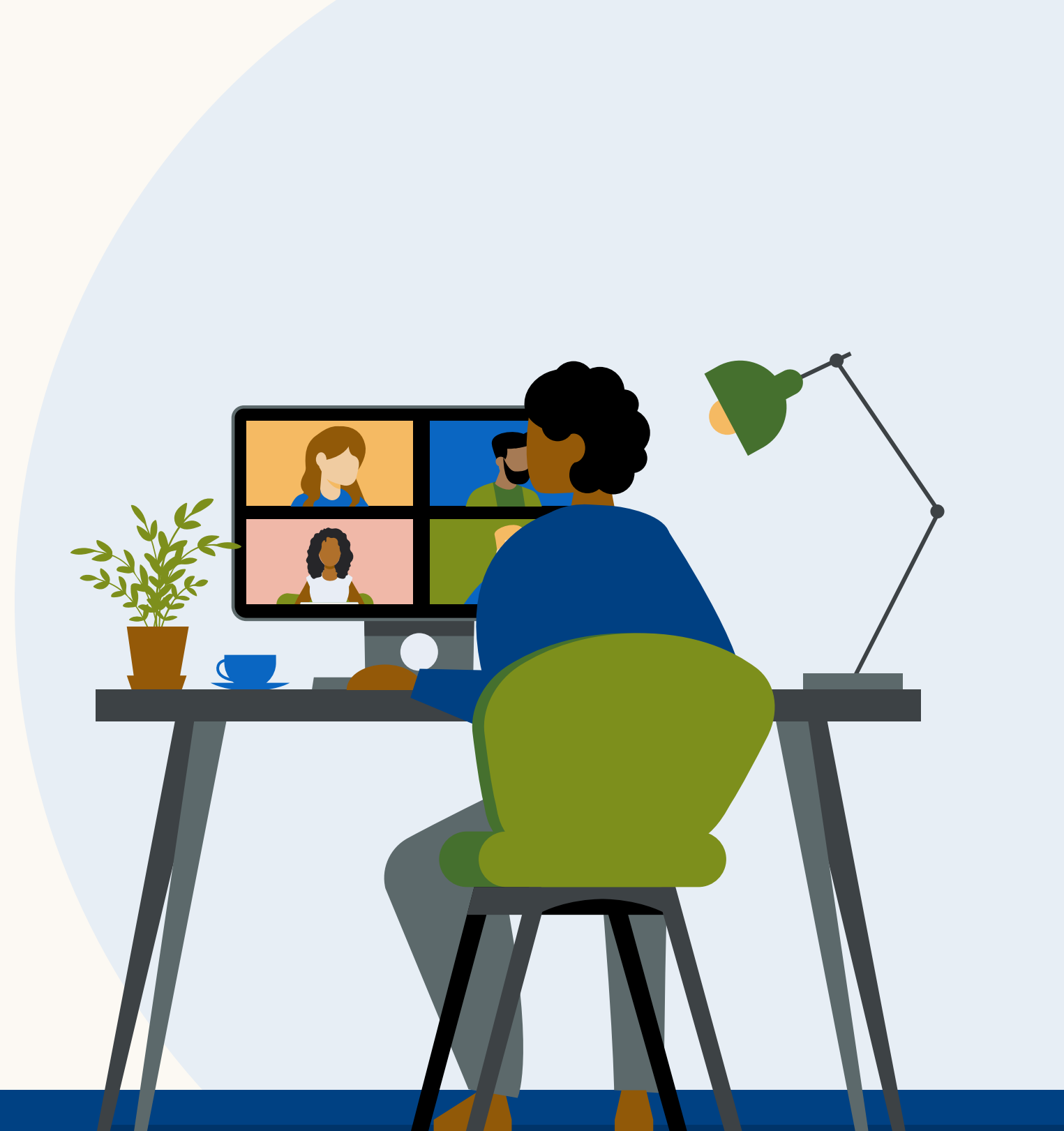
Investing in customer retention vs. acquisition

As the focus shifts from retention to acquisition, Sales Operations leaders are adjusting to drive success.

Many are embracing a hybrid approach where retention, customer success, and upsell are all owned by one team.

The fundamental market opportunity definition bottoms up from the account-by-account level. All Sales Operations organizations are trying to do more of this, but it's hard because of the need for many different data sources. Trying to weave all that together tends to be difficult but it's an important foundation.

When it comes to reallocating resources from acquisition to cultivating existing relationships in order to generate upsells and cross-sells, it starts with the right people, processes, and systems. The reality is that one set of sales professionals usually excels at landing new deals while another set is adept at growing revenue within existing accounts.



Investing in customer retention vs. acquisition

Rosalyn Santa Elena of Clari provides a view into her organization's approach: "We accelerated our plan to move to more of a hunter/farmer model and introduced a new team of account management roles. This meant implementing changes organizationally from the perspective of personnel, quota, compensation, and rules of engagement. It also requires changes in the system: rules of engagement, who's forecasting what, who's doing what, what are the handoffs?"



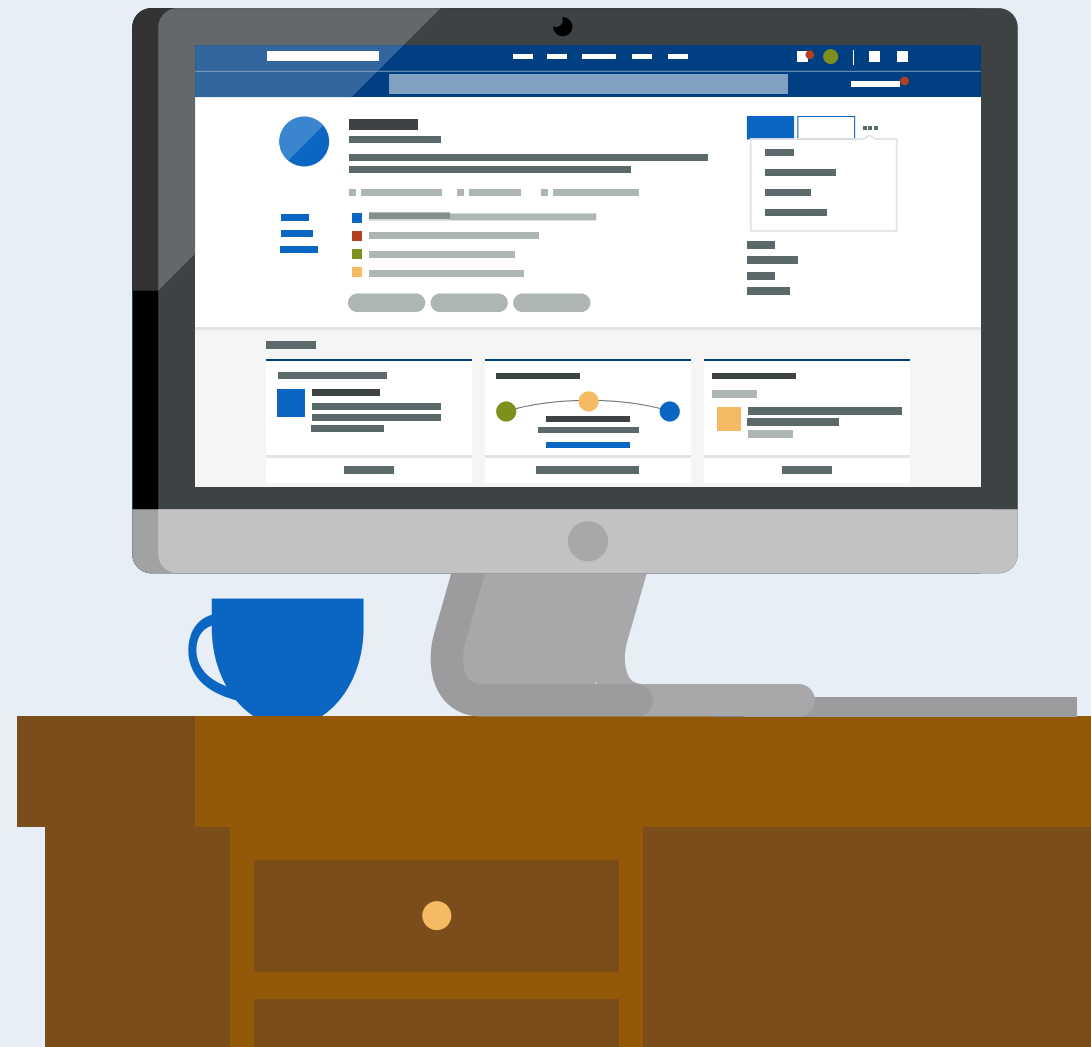
"Trying to turn a hunter into a farmer is tricky. It's a different skill set, and you typically pay your hunters a lot more."

—Rosalyn Santa Elena, Head of Revenue Operations at Clari

Investing in customer retention vs. acquisition

As selling into the base becomes vital, it's important to identify what products clients are ready for today. Sales Operations is looking for ways to throw more resources into that base and identify upsell opportunities, such as running webinars and offering content that appeals to existing clients. Hand in hand with this, organizations should reallocate their tech tools to empower their farmers, such as making it easier to identify opportunities for growth rather than solely looking for new accounts.

Farmed effectively, the current environment provides opportunities for companies with a healthy balance sheet to gain market share.



Addressing quota setting and comp for retention

Quota and compensation must change in line with a greater focus on retention.

A common complaint sales professionals express these days is being judged on performance within a given book of accounts and renewals. Because of so many shifts in business, there hasn't been enough stability for a long enough period of time to realistically forecast a number for the year.

It's not reasonable—especially in a SaaS business—to hand out bonuses when a rep is at 75% retention. Instead, the focus should be on achieving a steady environment, which requires sales discipline alongside management.



Addressing quota setting and comp for retention

For companies that are heavier on the salary side than the commission side, it will become more apparent where they need to adjust as they move into a full year of sales.

Joel Arnold at PowerReviews sees the opportunity. “I’ve dreamed of designing a one-size-fits-all approach to comp plans for a long time. This is the first time I’ve been able to do it with a tiered approach to commissions. Every account manager has a renewal as a percentage of the overall book of renewals that are due for the year. Along with that, they have an upsell goal. We assigned a goal tied to retention, and if you add the renewal quota plus the upsell quota, that total number can be 105% or whatever percentage of the book you start with. It’s very retention based.”

To enable this approach, Sales Operations needs their CRM system teed up with all renewals and a history of every product. With that visibility and the ability to automatically generate a renewal when the last deal gets closed, it’s possible to assign upsell quotas.



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Figuring out the concession matrix

Considering the tough economic situation, more customers are asking for concessions.

Chris Dent of Bain has seen this in the form of discounts, deferred payments, and even changes in terms of pay. “They might want to pause use of a product or service altogether and not pay at all.”

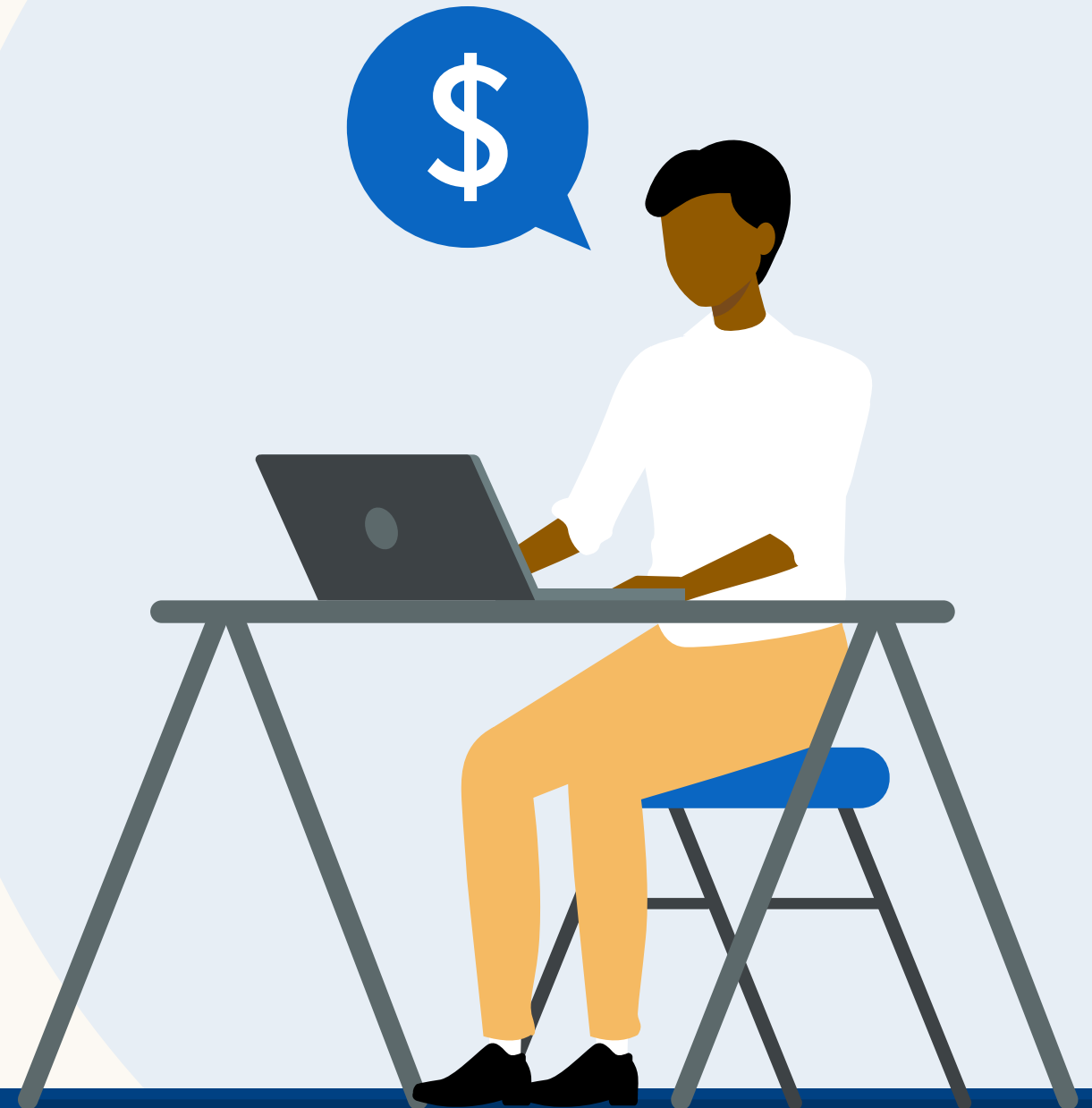
Organizations in a position of strength are going with standard operating procedures when it comes to what’s acceptable negotiation and concessions. Some Sales Operations teams are acting as a mediator between sales leadership and the CFO.

Where the Sales Operations or Rev Ops function includes enablement, they train frontline managers around give-to-get. Since they can’t approve every discount request, they look at the priority level of the client, whether they’re likely to churn, their renewal date, and their upside potential in the next two years.



Figuring out the concession matrix

If the situation looks promising, the organization is more inclined to offer different payment terms or some other concession. However, it asks for something in return—perhaps a case study or a testimonial or a commitment to an extra year upon renewal. In addition to setting up win-win scenarios for the company and its customers, this approach can actually help organizations steal market share from less flexible vendors that aren't willing to negotiate with their customers.



Managing changes in top of funnel/pipeline

At the start of COVID, vendors in certain industries—such as retail and ecommerce—still saw a steady flow of leads, and even the tire kickers showed interest in learning more.

However, many industries felt the pain of prospects refusing to answer sales calls and holding out on purchase decisions. As a result, some Sales Operations leaders have seen a decimation in top-of-funnel leads and pipeline. Due to so many tire kickers in MQLs, one organization was down **50** to **75%** within six weeks, going multiple weeks without driving new business. With sales cycles running nine months on average, such scenarios mean the organization is already behind with pipeline for 2021.

On the flip side, organizations are seeing pipeline growth from prospects looking to move quickly, especially in the main industries being hit right now. In response, Sales Operations is creating packages that include fast implementation.



Managing changes in top of funnel/pipeline

The win room involves a classic cross-functional group: **Sales enablement**, product marketing or product management, a frontline sales manager, and someone from Sales Operations technology or BI to load opportunities into the CRM system.

To enable the win room, the group needs to create a matrix featuring plays for upsell, cross-sell, acquisition, and renewal applicable to their product lines. The next step is ascribing a value to each of those, such as a big-dollar figure in the renewals line and nothing in the new business line. Sales runs the plays based on value and assigns people to that particular play. When the win room ramps up, sales might run two or three plays in different parts of the business with different owners.

It's a process to roll out a retention playbook and get sales reps comfortable with it. It involves determining which accounts are red, yellow, or green, and why, and training on how to message each account accordingly.

Dent's organization helped one client launch a win room to address COVID-related slowdowns.



“One of the clients I’m advising sells post-acquisition software. The company didn’t have many Sales Operations resources in place, so we set up agile-style daily huddles checking in on the pipeline and designing sales plays for reps with the assets, talking points, and target list. The win room allows for good pipeline management and discipline.”

—Chris Dent, EVP of Commercial Excellence Practice at Bain

Prioritizing Sales Operations in Revenue Ops

Sales Operations leaders feel it's a disservice not to prioritize sales operations in the revenue operations functions early on.

Without tracking who's getting what down to the product level, sales won't know what product to suggest when it comes time to upsell.

According to Joel Arnold, if it's a SaaS play, retention is where the growth comes from. "Unless you exponentially grow the new acquisition side, you're going to eventually reach a size where you're churning out as much as you bring on each year unless you prioritize retention."

Hanna Dekker of VNDLY advises on the importance of relationship building. "You should be building those relationships now rather than suddenly popping in after two years and four months to start selling them their renewal. It's key to have somebody on top of that and pay attention, especially in a transactional model."



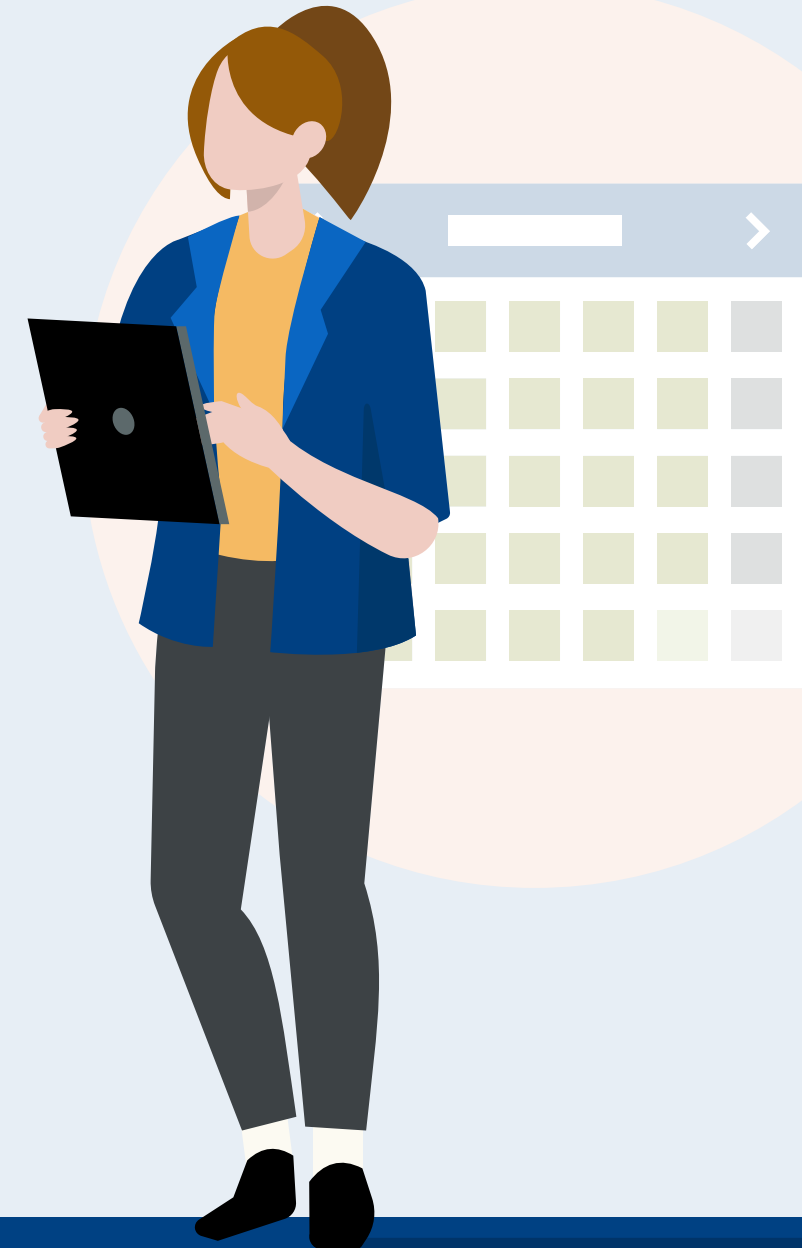
Acting vs. planning

Some Sales Operations leaders are finding themselves taking action rather than spending time on planning.

In other cases, Sales Operations leaders are pulling back from acting to spend more time strategically plotting their next course of action.

“I’m in the midst of switching from ‘act now’ to ‘plan now.’ It’s a matter of planning and assuming that when it becomes something big, we have the capacity to handle that flood of sales,” shares Dekker.

For Joel Arnold, it changes by the day but he’s coming out of the period of acting to planning. “The fiscal year forced the issue on that. But I’m leaving behind the comp plan and immediate budget concerns, and talking customers off the ledge to be more involved in our go-to-market strategies and how we price and package our products in this new world.”





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