Building Buyer Centric Sales Playbooks

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Senior Lecturer @HarvardHBS
Former CRO @HubSpot
Who is the sales person?
Who is the sales person?
Who is the sales person?
How did sales end up here?
Is it sustainable?
Pothole Alert!

Show up and throw up

#1. Show up and throw up (Inward-Out Approach)

Quit talking about how great your product or company is.

Nobody cares

Alligator Selling

Big Mouth, Little Ears
The power in the buying and selling process has shifted from the seller to the buyer.
Discovery Call Talk / Listen Ratios:
Top, Middle, and Low Performers

<table>
<thead>
<tr>
<th>TALK</th>
<th>LISTEN</th>
</tr>
</thead>
<tbody>
<tr>
<td>TOP REPS</td>
<td>46% - 54%</td>
</tr>
<tr>
<td>AVERAGE REPS</td>
<td>68% - 32%</td>
</tr>
<tr>
<td>BOTTOM REPS</td>
<td>72% - 28%</td>
</tr>
</tbody>
</table>

https://www.gong.io/blog/deal-closing-discovery-call/
Research on Discovery Call Best Practices

Top performing salespeople:

- Spread questions throughout the discovery call, rather than front-loading the call with questions
- Switch speakers every 3 minutes
- Ask between 11 and 14 questions throughout the call
Effective Discovery Calls Commonly Break Into Thirds

Rapport Building

Thorough Discovery of 3-4 Business Issues

Relevant logistics and next steps

https://www.gong.io/blog/deal-closing-discovery-call/
Modern sales teams build a sales process the “supports” the buying journey

Legacy Sales Teams

*Design sales process from inside out*

Modern Sales Teams

*Design sales process from outside in*
Train Sales to “Live” in your Buyers’ World

Legacy Sales Teams

*Teach salespeople to pitch the offering*

Modern Sales Teams

*Teach salespeople to walk in the buyer’s shoes*
Modern Selling

*Develop a Sales Process that Supports the Buyer Journey*
Components of the Modern Sales Playbook

*The Buying Journey*

Sales Playbook

- Prospecting Guide
- Discovery Guide
- Presentation Guide
- Customer Success

Buying Journey
Buyer Journey Framework

**Awareness**
What are the buyers top challenges or goals?

**Consideration**
What categories of solutions do buyers investigate?

**Decision**
What is the decision criteria and who is involved?

**Success**
When does the solution need to be in place?  
How will success be measured?  
Who needs to be involved?
TINYpulse Buying Journey

### Awareness
- What are the buyers top challenges or goals?
  - Poor Culture
  - Low Productivity
  - High Turnover
  - Recruiting Struggles
  - Boring Office

### Consideration
- What categories of solutions do buyers investigate?

### Decision
- What is the decision criteria and who is involved?

### Success
- When does the solution need to be in place?
- How will success be measured?

Aligned with TINYpulse
- Better Glass Door Scores
- Reduced attrition
- Increase in Offer Acceptances
- Win 3rd Party Awards

Mis-aligned with TINYpulse

Playbook to influence perspective
Components of the Modern Sales Playbook

The Prospecting Guide

Sales Playbook


Buying Journey
Prospecting Guide Template

Day 1
- Intro Phone Call (VM)
- Intro Email
- LinkedIn Connect / InMail

Day 5
- Nurture Email #1
- Follow Up 2nd Phone Call—Validate Info Received
- Mail Letter

Day 9
- Follow Up 3rd Phone Call—Offer Similar Content
- Nurture Email #2

Day 13
- 4th Phone Call w/ CTA (Such as Webinar Invite)
- CTA Email Follow Up

Day 17
- 5th Phone Call
  - If first contact is not achieved after 3 weeks of one-to-one nurturing, review with LDR Manager regarding appropriate next steps
- Email – Break Up Email (If No Response)

https://salesbenchmarkindex.com/insights/how-to-build-a-lead-nurture-campaign/
Conclusion

As you can see above, there are a number of reasons to consider upgrading to Shopify Plus that would encourage any developer to manage your website. In addition to these, apps and features are a number of other benefits that any e-commerce manager might find equally appealing. These include integrated integration with Avalara, managing taxation, 9 additional "clone shops" to meet the growth needs of an international e-commerce company and a dedicated account manager directly within Shopify to help give priority to support requests, answer platform questions and provide early access to the Shopify product roadmap. If you are a growing e-commerce company that needs a solid platform to manage sales and operations, consider getting in touch with Shopify Plus to discuss how an upgrade or migration can take your business to the next level.

Shopify Plus offer security for your every single e-co really want to understa Shopify Plus, you need live in the world of e-co to put together an artic that your e-commerce these translate into not

WATCH THE FREE WEBINAR
FIND OUT HOW SHOPIFIY PLUS WORKS!

Don't forget to share this article!

https://www.ictsiluppo.it/ecomerce/6-funzioni-irrinunciabili-shopify-plus
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Hi Michelle. This is Dwight from ICT. We specialize in creating ready-to-sell e-commerce websites for your business using the modern Shopify platform. Are you free at 1 PM tomorrow to discuss?

Voicemail #1: 5/27 at 3 PM

“Hi Michelle. This is Dwight from ICT. We specialize in creating ready-to-sell e-commerce websites for your business using the modern Shopify platform. Are you free at 1 PM tomorrow to discuss?”

5/29 at 2 PM

Hi Michelle. This is Dwight from ICT. We specialize in creating ready-to-sell e-commerce websites for your business using the modern Shopify platform. Are you free at 1 PM tomorrow to discuss?”
Old School Sales Prospecting

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6/1 at 4 PM
Hi Michelle. This is Dwight from ICT. We specialize in creating ready-to-sell e-commerce websites for your business using the modern Shopify platform. Are you free at 1 PM tomorrow to discuss?

Voicemail #1: 5/27 at 3 PM

Voicemail #2: 5/29 at 2 PM

Voicemail #3: 6/1 at 4 PM

Hi Michelle. This is Dwight from ICT. We specialize in creating ready-to-sell e-commerce websites for your business using the modern Shopify platform. Are you free at 1 PM tomorrow to discuss?

#4

Hi Michelle. This is Dwight from ICT. We specialize in creating ready-to-sell e-commerce websites for your business using the modern Shopify platform. Are you free at 1 PM tomorrow to discuss?

6/4 at 3 PM
Modern Sales Prospecting

Step #1: Research Contact Background and Company
Modern Sales Prospecting

Step #2: Review Buyer’s Interactions with Our Company

360 Degree View of Calls, Emails, Website Visits, Social Media Interactions, etc., with Your Company
Hi Michelle. This is Ryan from ICT. I noticed you attended our webinar this morning on ShopifyPlus. I took a look at your company’s current eCommerce website and had a few quick ideas on how to improve the site’s conversion. I will email them to you now. Let me if you would like to go over them.”

5/27 at 11 AM
Hi Michelle. This is Ryan from ICT. I noticed you attended our webinar this morning on ShopifyPlus. I took a look at your company’s current eCommerce website and had a few quick ideas on how to improve the site’s conversion. I will email them to you now. Let me if you would like to go over them.

Hi Michelle. This is Ryan from ICT. I found a case study of one of our customers in your industry that decreased their cart abandonment rate using Shopify Plus. I will email you the case study and am happy to walk you through their process when you have a moment.
“Hi Michelle. This is Ryan from ICT. I noticed you attended our webinar this morning on ShopifyPlus. I took a look at your company’s current eCommerce website and had a few quick ideas on how to improve the site’s conversion. I will email them to you now. Let me if you would like to go over them.”

5/29 at 6 PM

“Hi Michelle. This is Ryan from ICT. I found a case study of one of our customers in your industry that decreased their cart abandonment rate using Shopify Plus. I will email you the case study and am happy to walk you through their process when you have a moment.”

“Hi Michelle. This is Ryan from ICT. Since you were interested in the Shopify Plus webinar, I though you might also be interested in this webinar on examples of well-designed eCommerce sites. I am happy to point out which aspects of each example is most applicable to your website.”

6/1 at 12 PM
5/27 at 11 AM

“Hi Michelle. This is Ryan from ICT. I noticed you attended our webinar this morning on ShopifyPlus. I took a look at your company’s current eCommerce website and had a few quick ideas on how to improve the site’s conversion. I will email them to you now. Let me if you would like to go over them.”

5/29 at 6 PM

“Hi Michelle. This is Ryan from ICT. I found a case study of one of our customers in your industry that decreased their cart abandonment rate using Shopify Plus. I will email you the case study and am happy to walk you through their process when you have a moment.”

6/1 at 12 PM

“Hi Michelle. This is Ryan from ICT. Since you were interested in the Shopify Plus webinar, I thought you might also be interested in this webinar on examples of well-designed eCommerce sites. I am happy to point out which aspects of each example is most applicable to your website.”

6/4 at 10 AM

“Hi Michelle. This is Ryan from ICT. I have not heard back from you so I am going to assume that increasing the effectiveness of your eCommerce website is no longer a priority. Call me anytime if things change.”
Prospecting Guide Template

Day 1
- Intro Phone Call (VM)
- Intro Email
- LinkedIn Connect / InMail

Day 5
- Nurture Email #1
- Follow Up 2nd Phone Call – Validate Info Received
- Mail Letter

Day 9
- Follow Up 3rd Phone Call – Offer Similar Content
- Nurture Email #2

Day 13
- 4th Phone Call w/ CTA (Such as Webinar Invite)
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Day 17
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  If first contact is not achieved after 3 weeks of one-to-one nurturing, review with LDR Manager regarding appropriate next steps
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https://salesbenchmarkindex.com/insights/how-to-build-a-lead-nurture-campaign/
Components of the Modern Sales Playbook

The Discovery Guide
## Discover Call Guide - Template

<table>
<thead>
<tr>
<th>Stage</th>
<th>Example Questions</th>
</tr>
</thead>
</table>
| Rapport Building | a) Attempt 1: Chit-chat that subtly transitions to exploration  
|                | b) Attempt 2: Basic Open Ended  
|                | c) Attempt 3:  
| Awareness      | a) Culture is a broad term? How do you define it? What is your company culture and what do you want it to be?  
|                | b) Why do you think employee turnover is increasing?  
|                | c) What percentage of prospective employees accept your offer? What are the common reasons they do not accept?  
|                | d) Why has your culture been great? What made you successful at the start?  
|                | e) Was there an event that caused a decline in employee morale you are observing?  
|                | f) What makes you think your culture is great? OR What makes you think it is not?  
| Consideration  | a) How do you plan to increase morale?  
|                | b) What have you tried in the past to improve culture? Did it work? What will you try in the future?  
|                | c) Some organizations take a weekly pulse on employee happiness. Have you considered that option?  
| Decision       | a) What criteria will you use to make the decision? What drives this decision criteria?  
|                | b) Have you narrowed down the list of vendors you are considering?  
|                | c) Is cost, time to value, or customization to your precise goals most important in your solution decision?  
|                | d) If you make no progress on the product development process between now and the end of the year, is that an issue? Why?  
|                | e) Who else needs to be involved in this decision?  
| Recap & Next Steps | a) Thank you for the time to catch me up to speed Sarah. I understand you correctly. ACME Company's executive team sees an enormous opportunity to reduce employee turnover, specifically in the engineering and sales departments, by implementing a simple but frequent ping to employees about their happiness. By doing so, the company hopes to decrease annual turnover from 25% to sub 20% annually. ACME Corporation explored an annual survey last year but the frequency was no where near adequate. You have a meeting with your CEO in 6 weeks and want to have a detailed presentation regarding your recommendation prepared by then. Do I have this information correct?  

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**Note:** The template includes questions that are designed to build rapport, increase awareness of the potential impact, consider various options, and make a decision based on those considerations. Each stage is critical for ensuring a comprehensive understanding of the client's needs and goals.
### Aligning Sales Playbook with Customer Retention

Qualifying Matrix for Buying AND Retention

#### Sales Qualifying Matrix

**Customer Likelihood to Buy**

<table>
<thead>
<tr>
<th>Examples</th>
</tr>
</thead>
<tbody>
<tr>
<td>[B]udget</td>
</tr>
<tr>
<td>[A]uthority</td>
</tr>
<tr>
<td>[N]eed</td>
</tr>
<tr>
<td>[T]iming</td>
</tr>
<tr>
<td>[I]denitfy Pain</td>
</tr>
</tbody>
</table>

#### Customer Success Qualifying Matrix

**Customer Likelihood to Succeed**

<table>
<thead>
<tr>
<th>Examples</th>
</tr>
</thead>
<tbody>
<tr>
<td>[C]ontent</td>
</tr>
<tr>
<td>[C]ommitment</td>
</tr>
<tr>
<td>[C]oncept of a Lead</td>
</tr>
<tr>
<td>[T]ech Feasible</td>
</tr>
</tbody>
</table>

---

**Examples**

- Budget
- Authority
- Need
- Timing
- Content
- Commitment
- Concept of a Lead
- User Bought In
- Realistic ROI
- iT Bought In
- Tech Feasible
Components of the Modern Sales Playbook

The Presentation Guide

Sales Playbook


Buying Journey
Components of the Modern Sales Playbook

The Presentation Guide

Sales Playbook

Prospeting Guide  Discovery Guide  Buying Journey
Components of the Modern Sales Playbook

Create Presentation “Swim Lanes” to Tailor the Presentation to the Discovery Findings

Sales Playbook

Prospecting Guide → Discovery Guide → Presentation Option 1 → Presentation Option 2 → Presentation Option 3

Buying Journey

Presentation Best Practices
1. Recap buyer context
2. Share company vision
3. Illustrate service capability to meet buyer needs
4. Present case study aligned with buyer context
5. Discuss price, integration, training, etc.
6. Ask for questions
7. Recap findings and ask for the business
Components of the Modern Sales Playbook

Customer Success

Sales Playbook

Prospecting Guide → Discovery Guide → Presentation Option 1 → Presentation Option 2 → Presentation Option 3 → Customer Success

Buying Journey
Components of the Modern Sales Playbook

Customer Success

Sales Playbook

Prospecting Guide

Discovery Guide

Presentation Option 1

Presentation Option 2

Presentation Option 3

Generic On Boarding

Buying Journey
Components of the Modern Sales Playbook

Create Customer On-Boarding Swim Lanes to Match Presentation Swim Lanes

Customer On-boarding Best Practices
1. Recap buyer context
2. Ask for customer verification / adjustment
3. Recommend tailored on-boarding process
Coaching: Golf vs. Sales
“Data-Driven Sales Coaching”
Use data to diagnose the skill deficiency.
Customize a coaching plan.
Implement a data-driven sales culture

Last Quarter Performance By Salesperson

- Confirmed 1st Meeting
- Needs Verified
- Decision Maker Verbal
- Signed Contract
- Bookings

* Fictitious Data
Hold organization accountable to a data-driven coaching culture

1st Day of Month

Morning

Sales Person / Manager Independent Reviews
- Think through qualitative performance
- Review individual metrics
- Think about Skill/Development Plan

Afternoon

Manager Meets with Sales Person
- Discuss qualitative performance
- Review individual metrics
- Co-Create Skill/Development Plan

2nd Day of Month

Morning

Director Meets with Manager
- Review Skill/Development Plans for each sales person

Afternoon

VP Meets with Director
- Review Skill/Development Plans for each sales person
### Example monthly coaching plan

<table>
<thead>
<tr>
<th>REP</th>
<th>DIAGNOSIS</th>
<th>COACHING PLAN</th>
<th>METRICS GOAL</th>
</tr>
</thead>
<tbody>
<tr>
<td>Brian</td>
<td>Over-investment in unqualified meetings</td>
<td>Weekly opportunity review of BANT post discovery call.</td>
<td>Demo-to-Contract % &gt; 30%</td>
</tr>
<tr>
<td>Carlos</td>
<td>Low meeting activity</td>
<td>Personal conversation on financial motivations. Map to daily activity.</td>
<td>Average 4+ new appointments per month</td>
</tr>
<tr>
<td>Anna</td>
<td>Developing Sense of Urgency</td>
<td>Pre-call planning and post mortem reviews on urgency</td>
<td>1st Meeting to Needs Verified % &gt; 50%</td>
</tr>
<tr>
<td>Fred</td>
<td>Time management issues</td>
<td>Place 2 hours of prospecting into daily calendar. Send daily email to manager of new leads contacted and appointments set.</td>
<td>Average 5+ new appointments per month</td>
</tr>
<tr>
<td>Erin</td>
<td>Desire to close a few large accounts</td>
<td>Conduct 3 new meetings per month with major accounts without compromising the rest of her pipeline</td>
<td>Bookings / Customer &gt; $120,000</td>
</tr>
</tbody>
</table>
### June Coaching Plans

<table>
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<td>Fri</td>
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<td>Average for new appointments per week.</td>
<td></td>
</tr>
<tr>
<td>Fri</td>
<td>n</td>
<td>Lack of personal goals</td>
<td>Personal conversation on financial goals. Map to daily activity.</td>
<td>Average for new appointments per week.</td>
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### July Coaching Plans

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# Simple Tactic to Improve Forecast Accuracy and Buyer-Seller Alignment

**Define Opportunity Stage Gates by Buyer Actions not Seller Actions**

<table>
<thead>
<tr>
<th>Stage</th>
<th>Sales Actions</th>
<th>Customer Actions</th>
<th>CRM Inputs</th>
<th>Exit Criteria</th>
</tr>
</thead>
<tbody>
<tr>
<td>Discovery</td>
<td>• Schedules discovery call • Sends reminder email • Reviews research prior to call • Sends recap / next steps email</td>
<td>• Accepts meeting invite • Attends discovery meeting • Provides information about budget, timeline and need</td>
<td>• Schedule demo meeting • Fill in all Information in Discovery section of Opp • Update close date &amp; next steps</td>
<td>• Discovery Meeting Held • Demo meeting scheduled • All Discovery fields completed in CRM</td>
</tr>
<tr>
<td>Demo</td>
<td>• Customize Presentation and incorporate use cases • Test demo account • Review Discovery call notes • Send recap / next steps email</td>
<td>• Decision Maker Attends Presentation • Has agreed to review proposal or pricing</td>
<td>• Demo completed date field updated • Complete Demo section of Opp • Update close date &amp; next steps • Decision maker field updated</td>
<td>• Demo meeting held with customer in attendance • Demo stage required fields completed • Proposal meeting on the books • Recorded meeting added to Google Drive</td>
</tr>
<tr>
<td>Proposal</td>
<td>• Proposal drafted • Proposal meeting scheduled • Loop in Legal, Technical Support, and other stakeholders as necessary</td>
<td>• Attends proposal meeting • Provides necessary billing Information • Gives verbal agreement • Agrees on Implementation date</td>
<td>• Complete Proposal section of Opp • Update close date &amp; next steps</td>
<td>• Amount, Close Date, Next Steps updated in CRM • Proposals attached to deal in CRM • # of verifications updated in CRM</td>
</tr>
<tr>
<td>Evaluation</td>
<td>• Create Test Map and review with customer</td>
<td>• Confirmed proposal is correct • Sent to legal • Gave names of internal champions to coordinate onboarding</td>
<td>• Complete Evaluation section of Opp • Update close date, trial start, and end date</td>
<td>• Agreement signed by customer and uploaded to deal • Notes for CS completed in CRM • Kick-off dated added to deal</td>
</tr>
<tr>
<td>Closed Won</td>
<td>• Introduces CSM • Draft internal onboarding email for Implementation team • Collect implementation fee or first month’s payment</td>
<td>• Returns signed contract • Pays Implementation fee or first month’s payment • Accepts onboarding meeting invitation</td>
<td>• Documents attached to deal • Close date, amount, # of verifications match signed order form</td>
<td>• Implementation team has what they need to onboard successfully • Kick-off meeting scheduled with CSM and Implementation team</td>
</tr>
</tbody>
</table>
Use Daily Film Reviews to Optimize Buyer Journeys and Sales Playbooks

#4 ITERATE
1. Buyer Journey
2. Discovery Guide
3. Presentation Guide

#3 REFLECT
1. Was our approach optimal?
2. Did we execute well?

#2 REVIEW
1. Listen to call as a team
2. Self assessment from salesperson with recording
3. Positive feedback
4. Areas of improvement
5. Open for team comments
6. Manager recap

#1 SETUP
1. Salesperson records call
2. Salesperson prepares positive feedback
3. Salesperson prepares needs for improvement feedback

Conduct Daily Film Reviews

Iterate ICP/CVP

Reflect on and Apply Learnings
Want to download our free Stage 2 *Science of Scaling* eBook?
https://blog.stage2.capital/science-of-scaling

Want to download our free Stage 2 *Bottoms Up Growth Model*?
https://blog.stage2.capital/bottoms-up-sm-model

Want to download our free Stage 2 *Hiring the First Sales Leader Playbook*?
https://blog.stage2.capital/hiring-sales-leader
Jay Simons – President, VP S&M @ Atlassian
Lesley Young – Global Sales @ Facebook Workplace, Box
Jed Nachman – COO, CRO @ Yelp
Jon McNeill – Former President @ Tesla, COO @ Lyft
Leela Srinivasan, CMO @ SurveyMonkey, LinkedIn, Upwork
Emmanuelle Skala – SVP Customer Success @ Toast, Digital Ocean
Oliver Jay – Head of Sales @ Asana, DropBox
Sydney Sloan – CMO @ Salesloft, Jive, Adobe
Brian Halligan – CEO @ HubSpot
Hilary Headlee – Head of Sales Ops @ Zoom, MindBody
Josh Allen – CRO @ Drift, CarGurus
Carol Meyers – CMO @ Rapid7
John Boucher – SVP @ Oracle, ServiceSource
Kara Gilbert – Chief People Officer @ Turbonomic
Andrew Rains – CRO @ Automotive Mastermind, VTS
David Meerman Scott – Speaker & Best Selling Author
Jeetu Mahtani – SVP International Sales @ HubSpot
Lou Shipley – CEO @ Blackduck Software
Tom Chavez – CEO @ Superset, Krux
Bill Vellante – GM @Infor, Workday, Oracle
Jim Norton – CRO @ Dosh, Conde Nast, AOL, Google
Larry D’Angelo – Chief Sales Officer @ LogMeln
Mike Volpe – CEO @ Lola, CMO @ HubSpot
Michael Manne – CRO @ Reonomy, Namely
Mike McGuinness – Chief Customer Officer @ Veracode
Mike Arntz – SVP Sales @ SmartSheet, NetSuite
Mark N. Roberge
Senior Lecturer of Business Administration

Mark Roberge is a Senior Lecturer in the Entrepreneurial Management Unit at the Harvard Business School. He teaches Entrepreneurial Sales and Marketing in the second-year MBA program in the Fall term and The Entrepreneurial Manager and Startup Bootcamp in the first-year MBA program in the Spring and Winter terms.

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All proceeds go to

Ayele Shakur
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