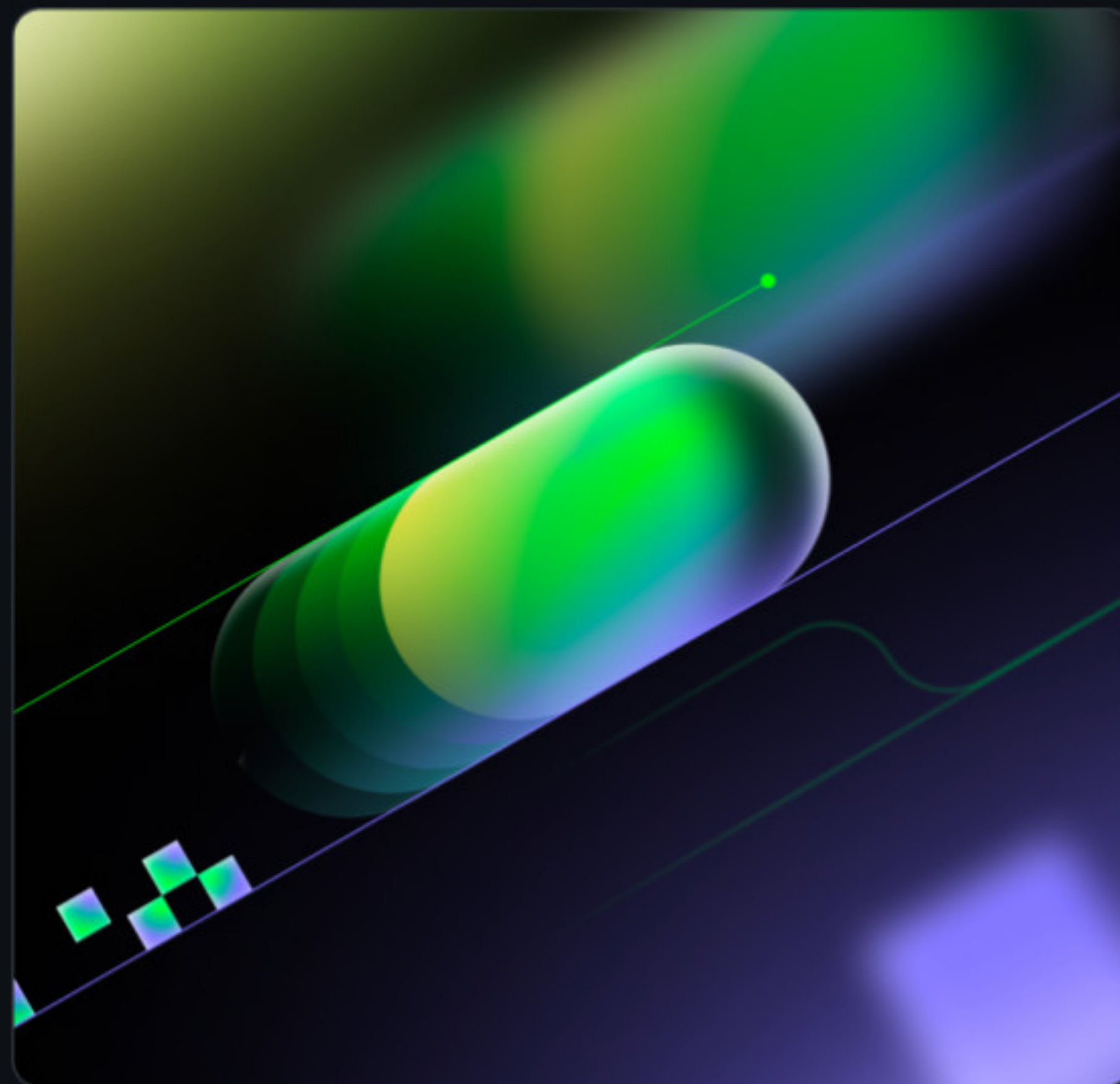




Agenda

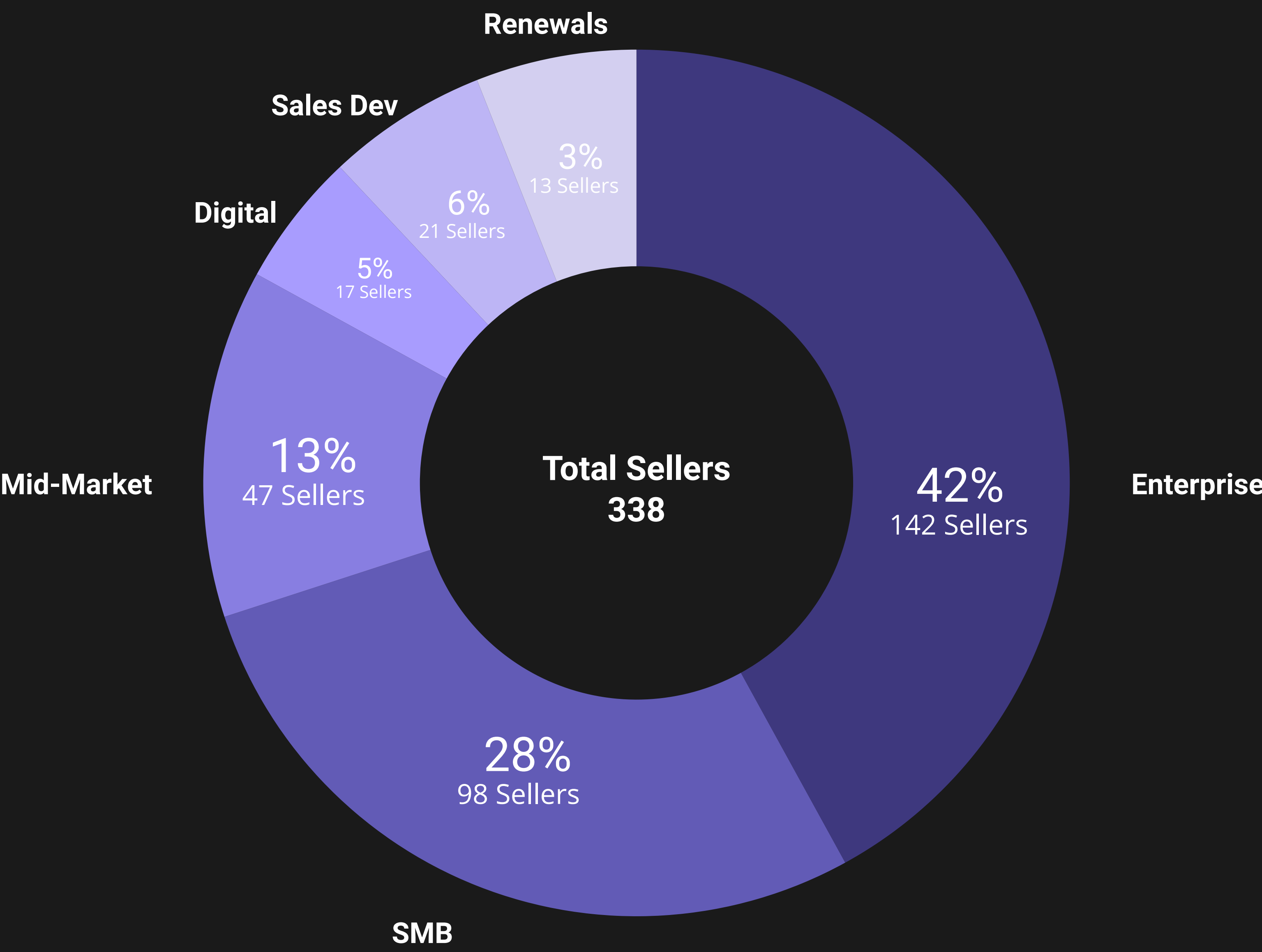
- 1 Introduction**
- 2 Data**
- 3 Persona Deep Dives**



Our Personas encapsulate the diverse roles within the sales team, their unique challenges, and the technological needs required to enhance their efficiency and effectiveness.

Wait where did this data come from exactly?*

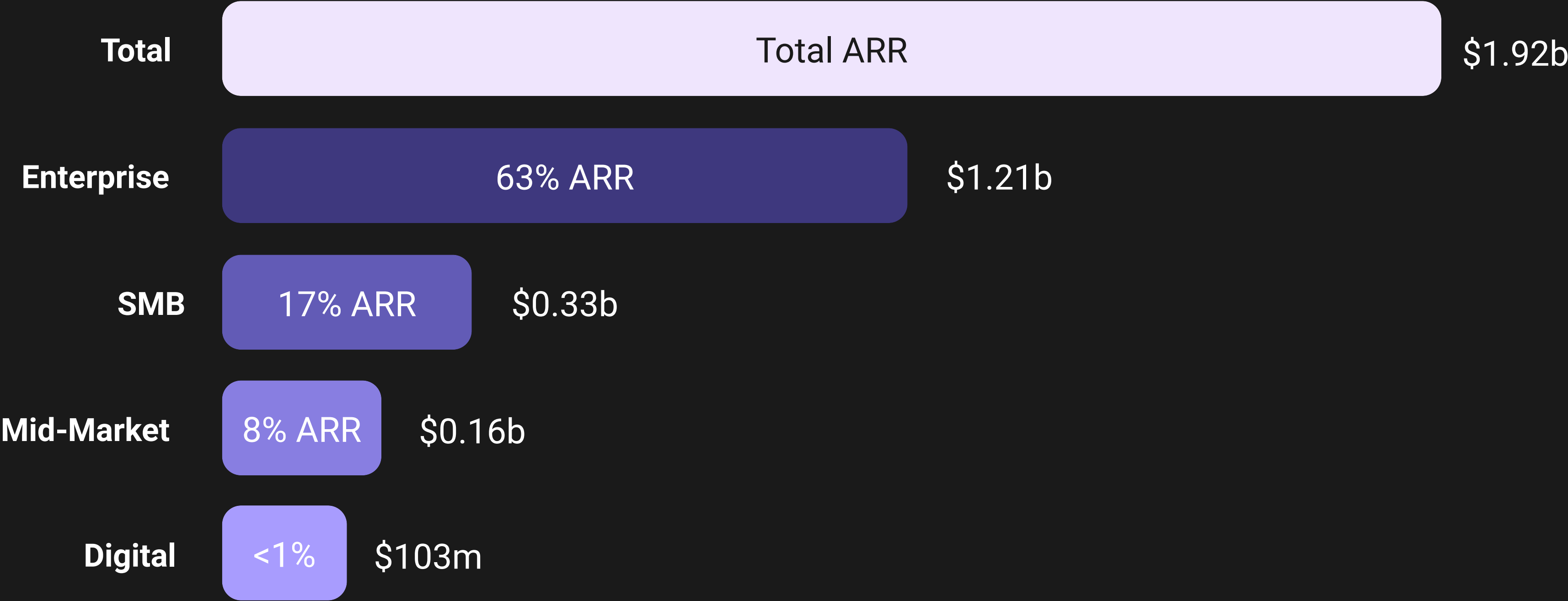
Sellers by Segment



*Source: Workday (Alex Yanes)

Wait where did this data come from exactly?*

ARR By Segment



*[Source](#): ARR Summary Report in Power BI
Verified by Chad Lucas

Contributing Hubbers



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Senior Product Manager - People Systems



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Sr. Mgr, Mid-Market Sales



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Josh Bradbury / @yachtrockr
Sr. Dir, Enterprise Sales, Software & Digital



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Sr. Mgr, Global Digital Sales



Michael Wolfe / @mowolfe
Senior Enterprise Account Executive II



Chad Lucas / @chadjlucas
Sr. Dir, IT - Finance Systems



Chris Wheeler / @chris-wheeler
Sr. Dir, Global Sales Development



Dave Eide / @daveeide
VP, Enterprise Sales - AMER



Keshia Hohenstein / @keshia-h
VP, Global Mid-Market Sales



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Manager, Digital Sales, EMEA



Karen Juhl / @liljuhl
Sr. Dir, Digital Sales



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Director Digital Sales



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Senior Enterprise Account Executive III



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Jenna Rutledge / @jennarutledge
Digital Sales Account Executive



Michael Pletta / @michaelpletta
Dir, Mid Market Sales



Jimmy Parrillo / @jimmyparrillo
Dir, Mid Market Sales



Austin Buck / @ayybuck
Sr. Mgr, SMB Sales, AMER



Wen Du / @wen-du
Dir, Sales and Marketing Analytics

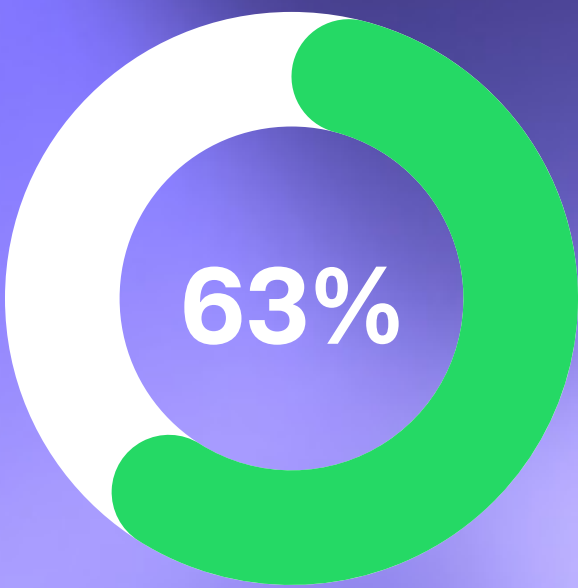


Hello, My Name is

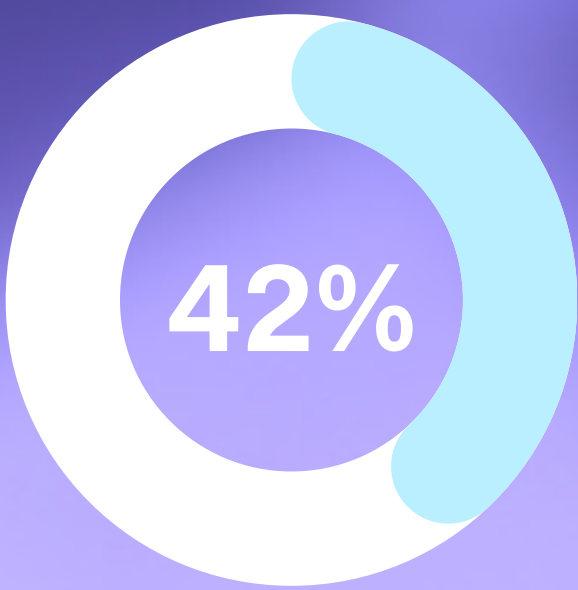
Alex Carter

Pronouns **She/Her/Hers**
Occupation **Enterprise AE**
Location **New York, NY**

% of Revenue
Generated



% of Sellers



Background

"I manage multi million dollar deals with fortune 500 companies and spend a lot of time building relationships with C-Suite executives and their product & engineering teams"

Goals

- Maximize Revenue
- Increase Sales Efficiency
- Build and Maintain Internal Relationships
- Streamline Deal Management
- Nurture Client Relationships
- Cross Sell & Build Existing Accounts

Needs

- SFDC to be a one stop shop
- Automated Deal Approval Workflows
- Accurate Revenue Forecasting
- Seamless CRM Integrations
- Commission Transparency
- Faster Quote to Cash Process
- MSFT data from PowerBI in SFDC

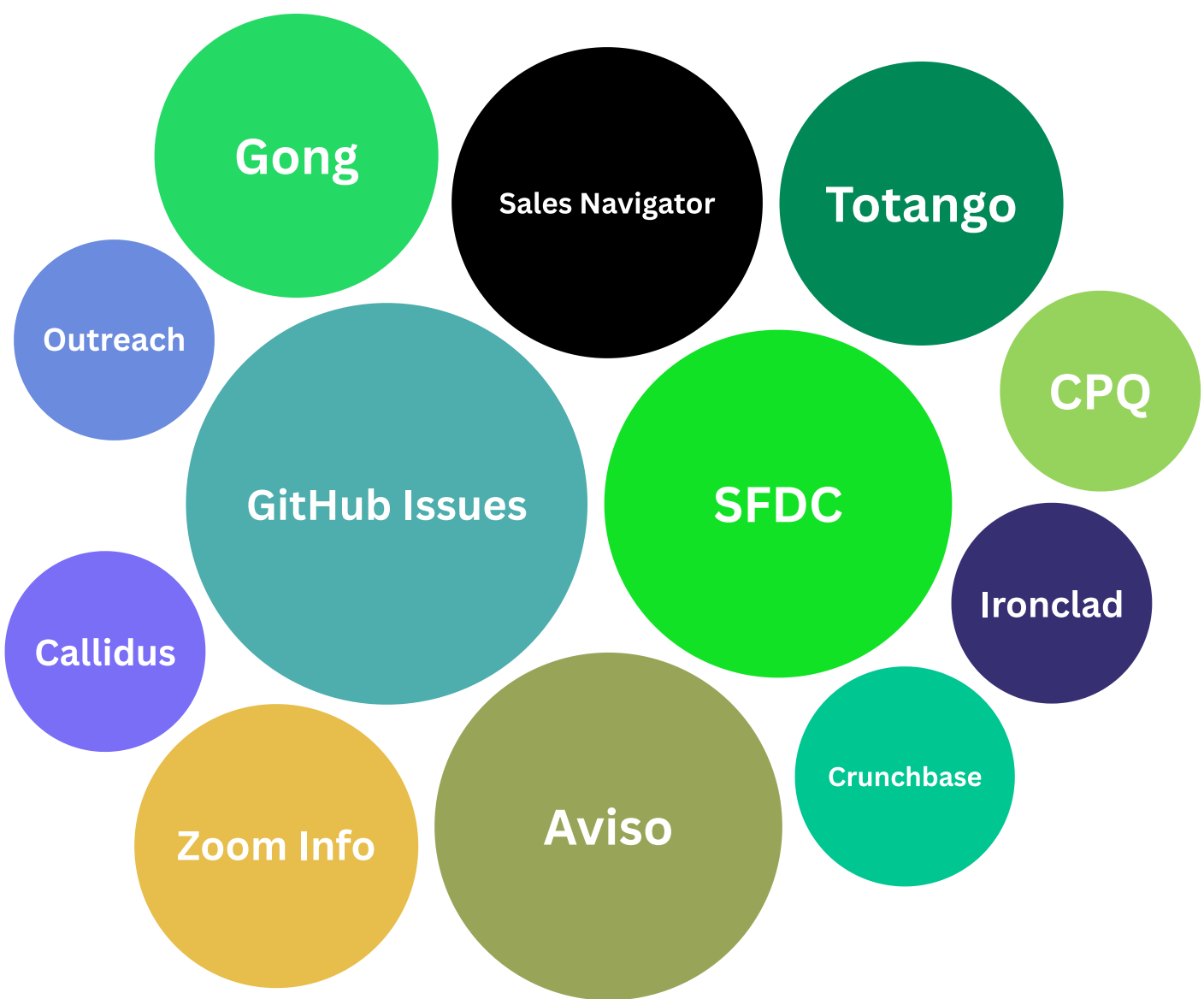
Pain Points

- Quotes for accounts with contracted pricing still needs manual approval by Deal Desk
- Inefficient Deal Processes
- Data Inconsistencies
- Complex Stakeholder Management
- Too many tools for approvals (docusign, ironclad and sfdc)

Scenarios

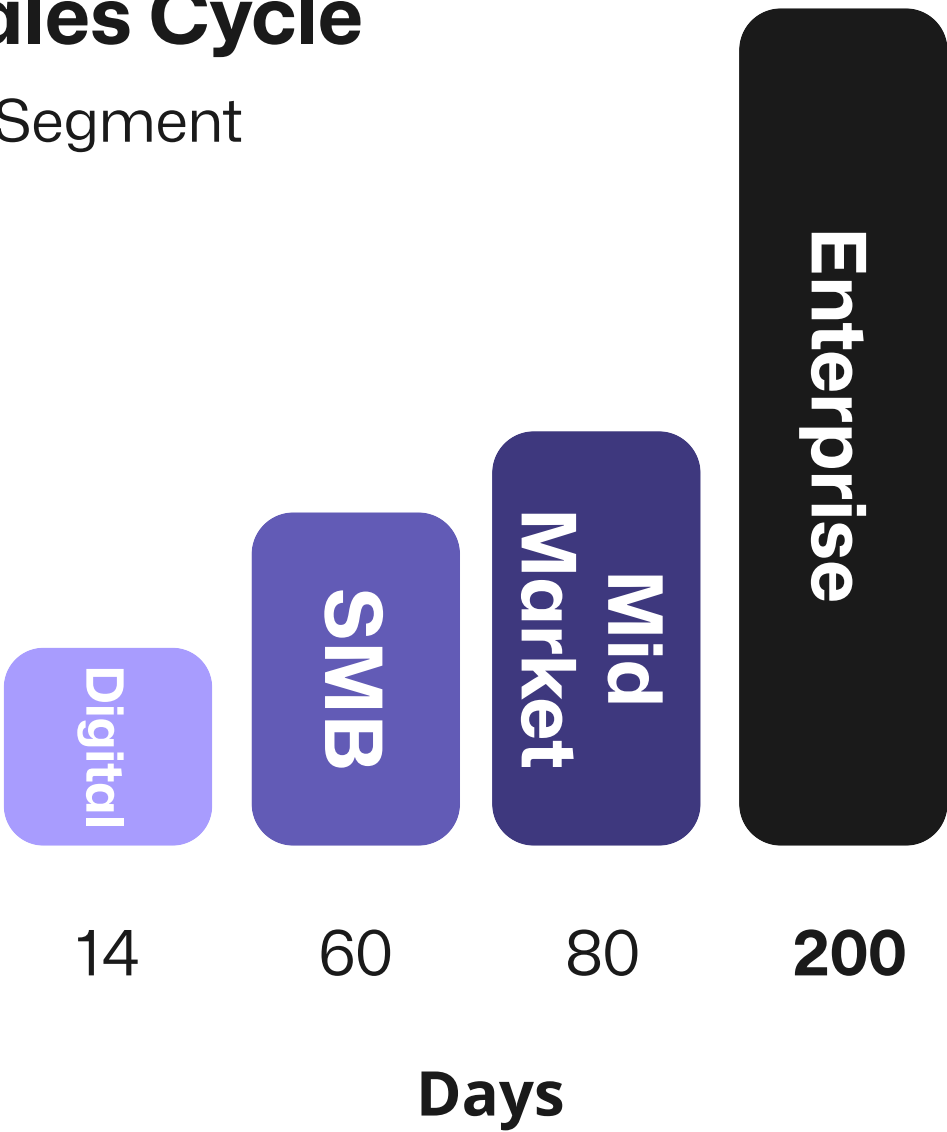
- Closing a Multi Million Dollar Deal
- Finding/research prospective champions with associated help from EBRs
- Researching Companies & Contacts
- Scheduling Meetings & Keeping Record of Call Transcripts

System Usage



Sales Cycle

by Segment

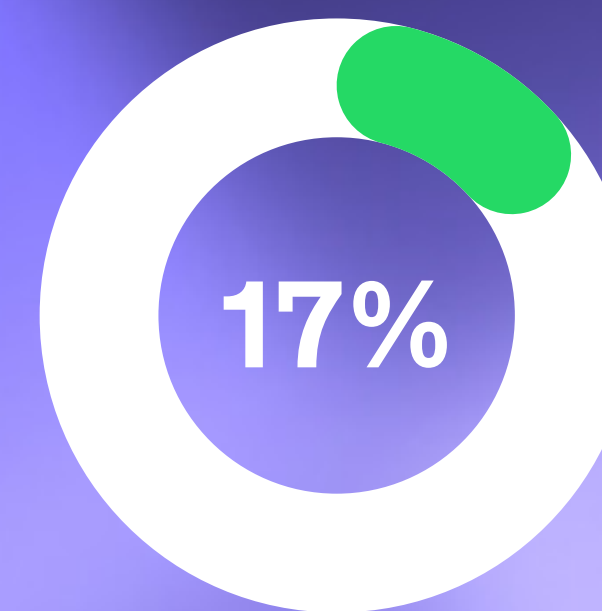




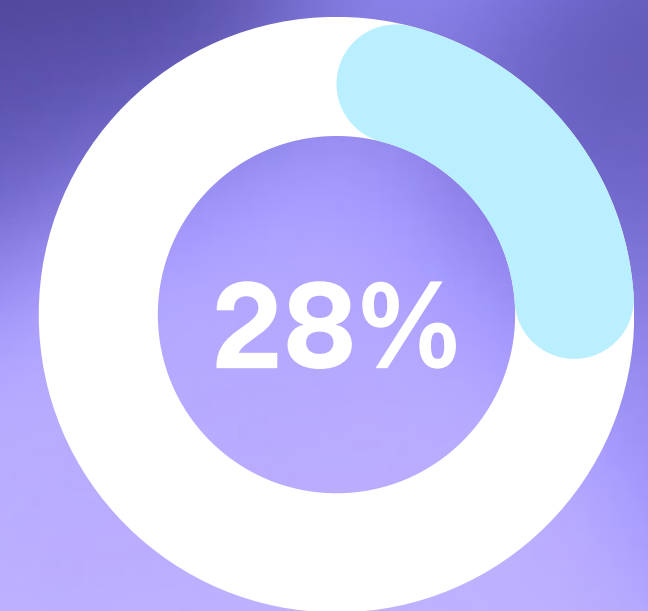
Hello, My Name is
Ethan Chen

Pronouns He/Him/His
Occupation SMB Account Executive
Location Seattle, WA

% of Revenue
Generated



% of Sellers



Background

"Managing hundreds of accounts at a time means I need processes, systems, automation, and support that allow me to manage them effectively"

Goals

- Hit & exceed sales quotas
- Build & maintain a pipeline of high-potential leads
- Accelerate customer adoption of the whole platform
- Maximize revenue per account
- Improve sales efficiency
- Optimize pricing & discounts

Pain Points

- Competing priorities
- Lead Quality & Volume
- Non revenue generating work
- Visibility into customer data
- Churn & retention issues
- Internal process friction
- Accounts changing hands without notes

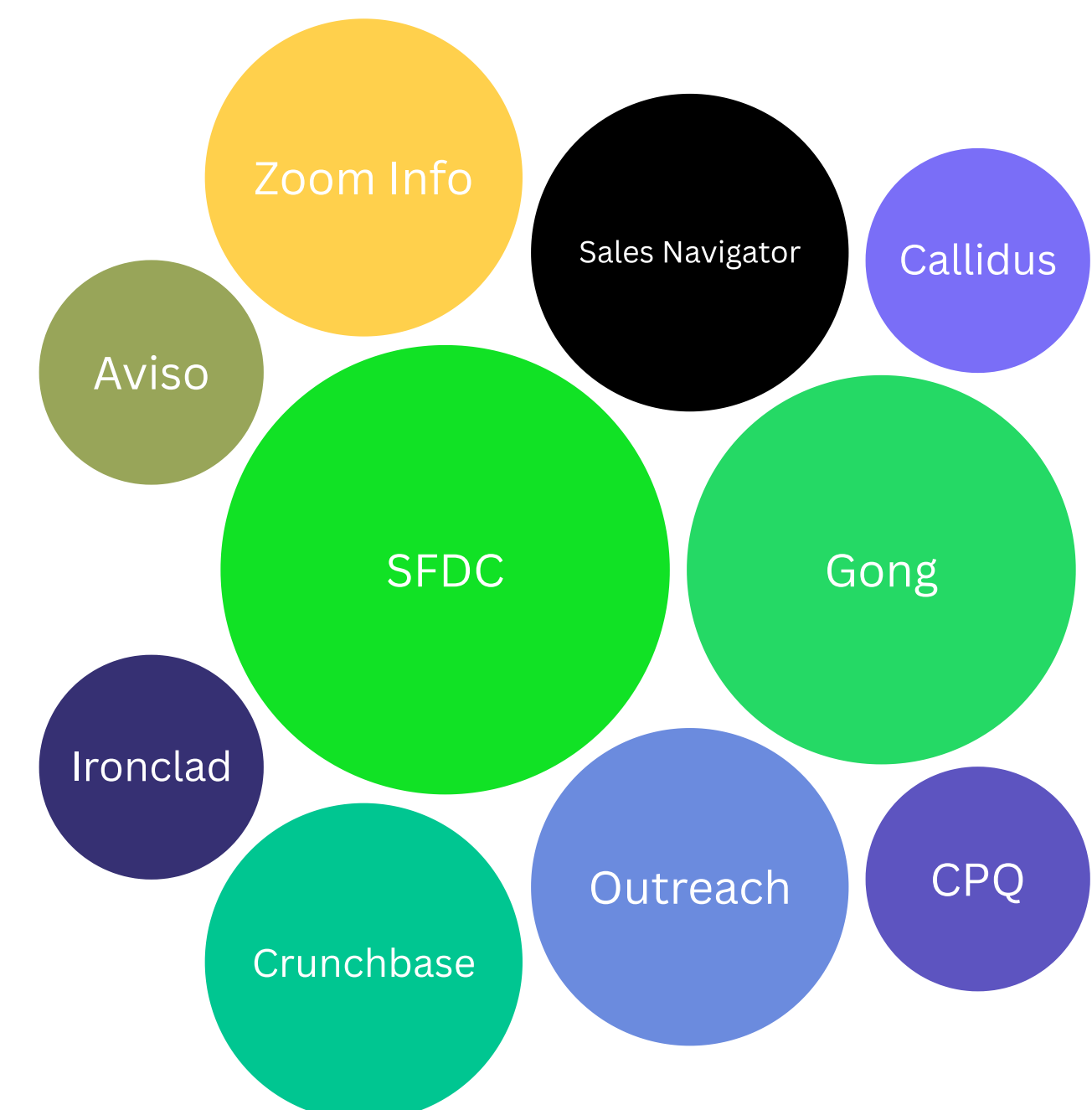
Needs

- High-quality leads
- AI-driven insights
- Efficient CRM tools
- Automated quoting
- Streamlined discount approvals
- Real-time performance tracking
- Upsell/cross-sell opportunities
- Productivity tools to reduce admin work

Scenarios

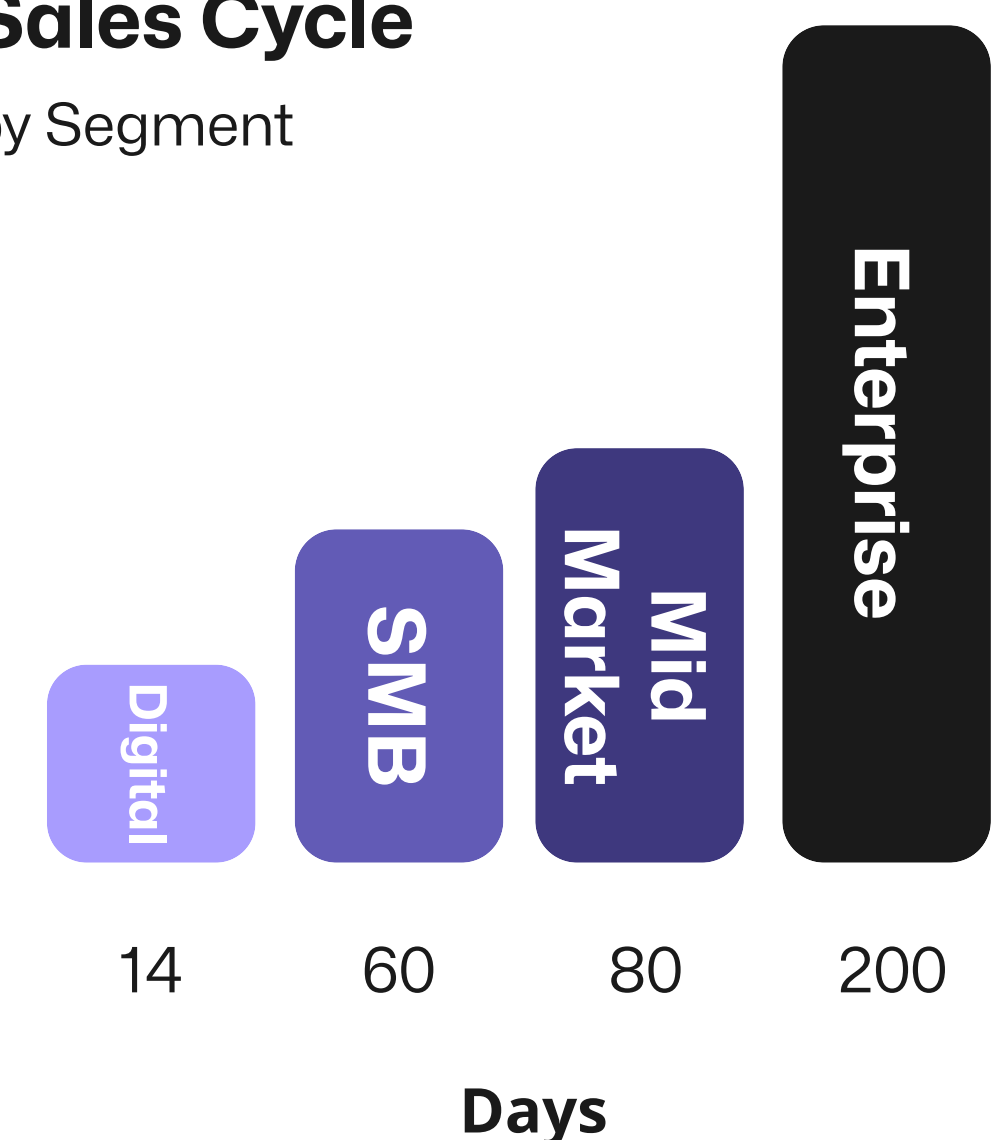
- Pipeline Analysis & Prioritization
- Re-engagement of Stalled Deals
- Upsell & Expansion Opportunities
- Forecasting & Leadership Reporting
- Contract Creation

System Usage



Sales Cycle

by Segment



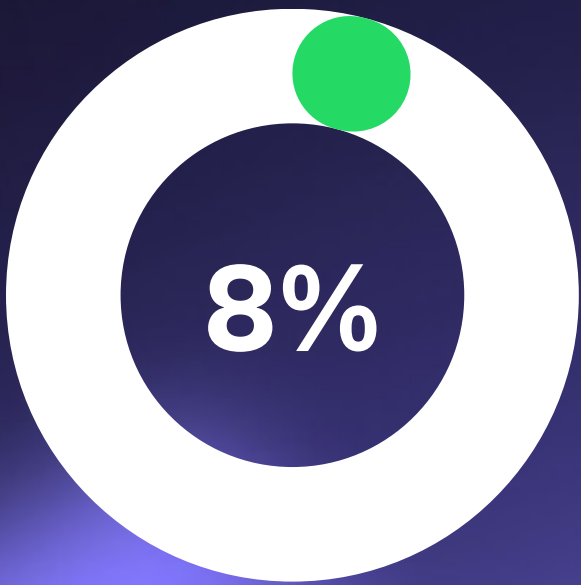


Hello, My Name is

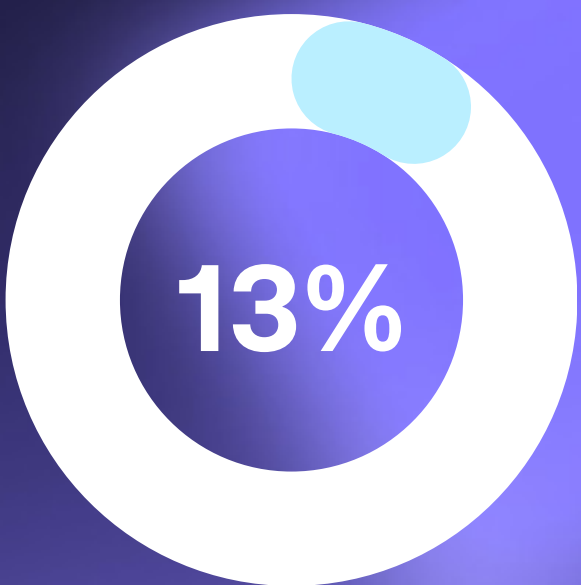
Terry Mansell

Pronouns **He/Him/His**
Occupation **Mid-Market AE**
Location **San Francisco, CA**

% of Revenue
Generated



% of Sellers



Background

"I manage Accounts that have 500-1,250 potential developers with average deal sizes around \$100K. My focus is on new logo acquisition and expansion opportunities and primarily work with C-Suite, VPs & Directors. I also do a lot of work with Microsoft & partners!"

Goals

- Grow deals so we continue to do transformational, multi-sku deals
- Close More Deals, Faster
- Improve Pipeline Accuracy
- Optimize Renewals & Expansions
- Reduce Admin Overload
- Maximize Commission Earnings
- Easily navigate internal tools, systems, and teams - get past blockers & accelerate deal cycles

Needs

- Automation in Dealdesk
- CRM Data Hygiene & Automation
- A more streamlined approval process
- AI Driven Deal Prioritization
- Tooling standardization

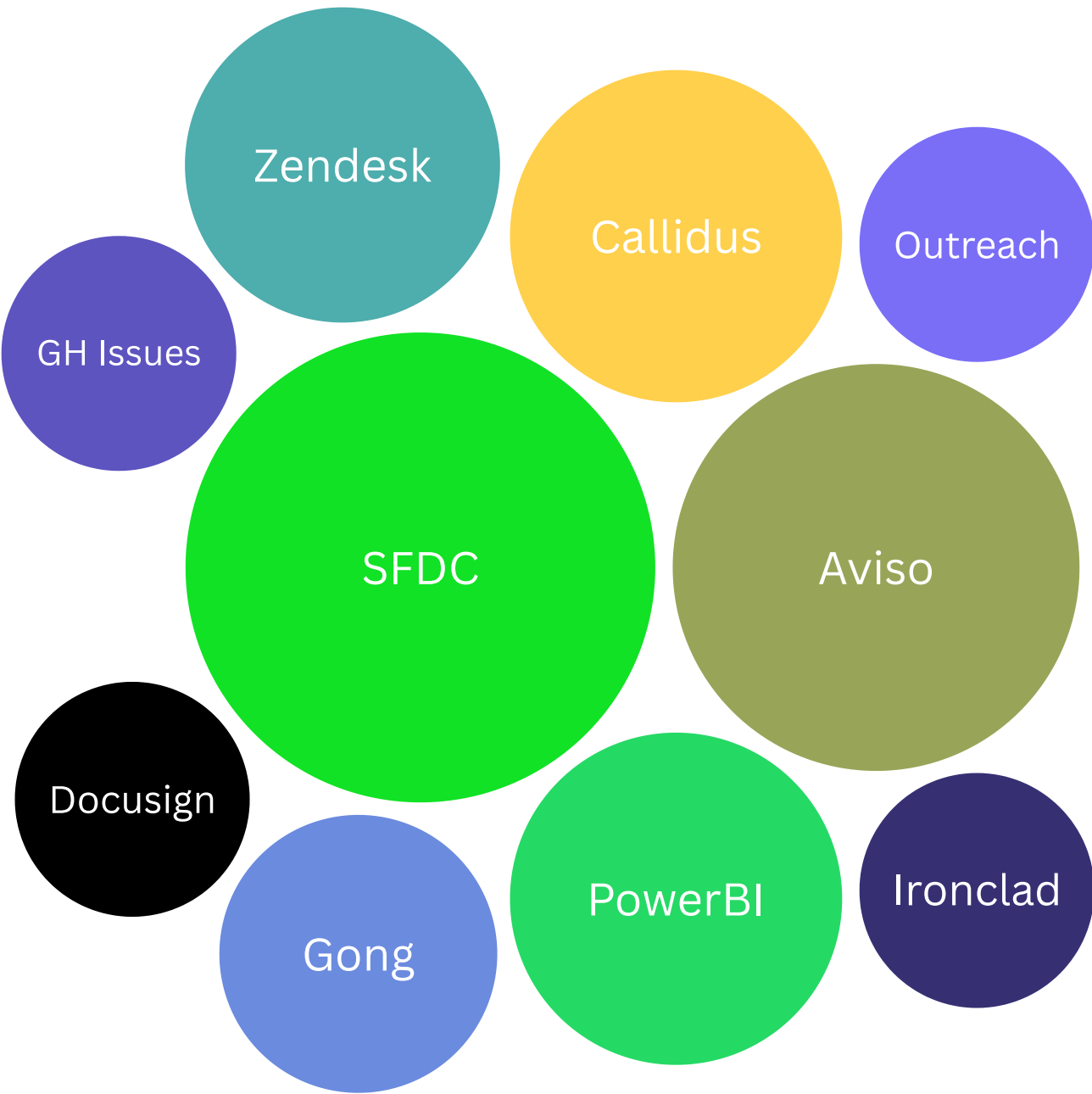
Pain Points

- Balancing Driving Adoption with Selling Activities
- Customer Data Accessibility & Cleanliness - Huge
- Getting Dragged Into Admin Activities
- Inconsistent CRM Data
- Limited Visibility into Customer Intent
- Quick product evolution and need for continuous learning

Scenarios

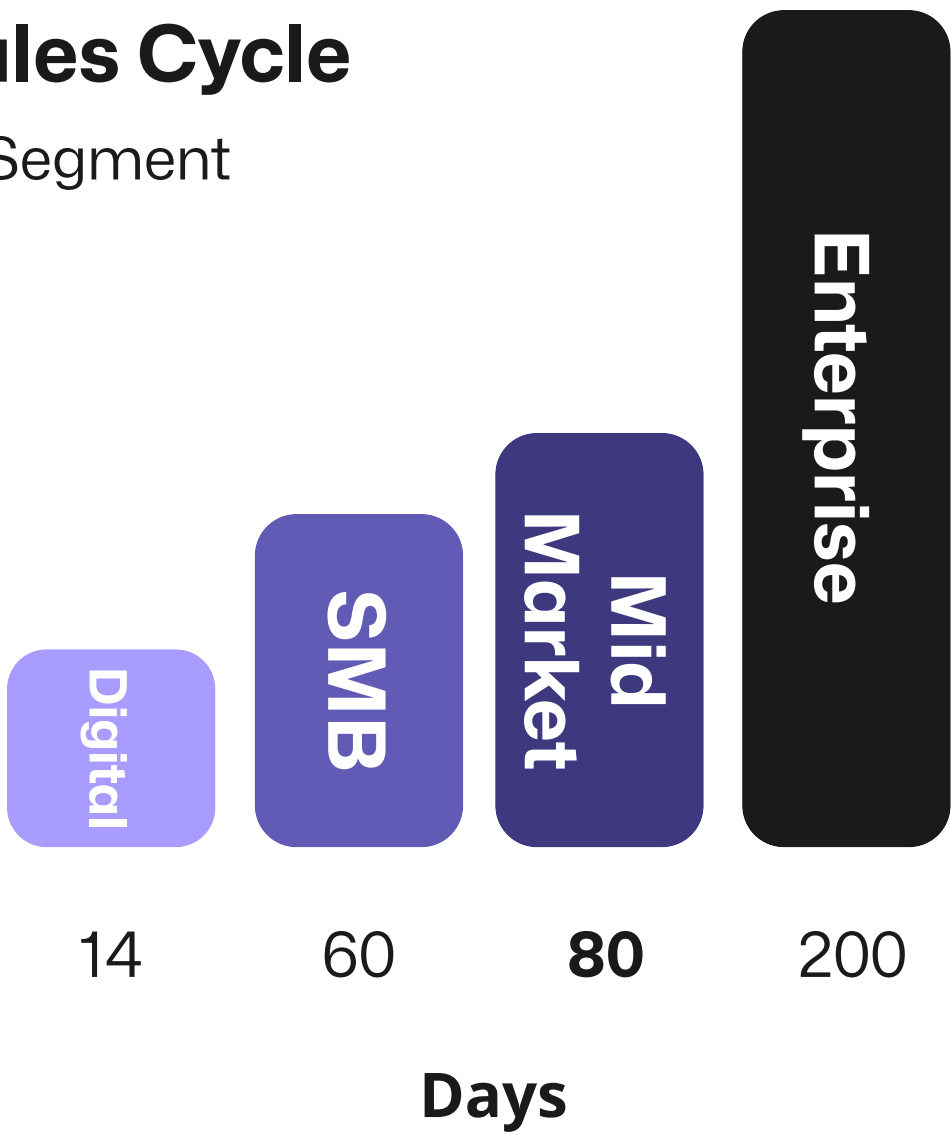
- Closing a Multi Sku License Deal That Requires Custom Pricing
- Ensuring a Multi-Year Renewal & Expansion
- Prospecting, Researching Companies & Contacts
- Co selling with Microsoft
- Metered vs. subscription deals

System Usage



Sales Cycle

by Segment





Hello, My Name is

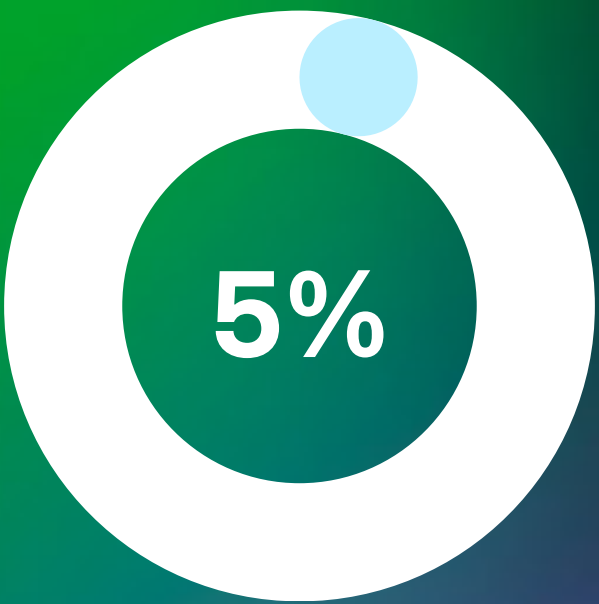
Sonia Shaw

Pronouns **She/Her/Hers**
Occupation **Digital Sales AE**
Location **San Francisco, CA**

% of Revenue
Generated



% of Sellers



Background

I focus on a high volume of deals where the average deal size is \$7k, and shorter sales cycles that average 2-4 weeks. My buyers are in the 0-100 seat segment and our team manages 300,000+ accounts. I <3 automation & process efficiency.

Goals

- High Volume, High Velocity Selling
- Maximize Inbound Conversions
- Increase Efficiency with Automation
- Account targeting at scale

Pain Points

- Manual Processes/Workflows
- Unreliable data hygiene in SFDC and PowerBI
- Context switching between sales tools
- Low Quality Leads

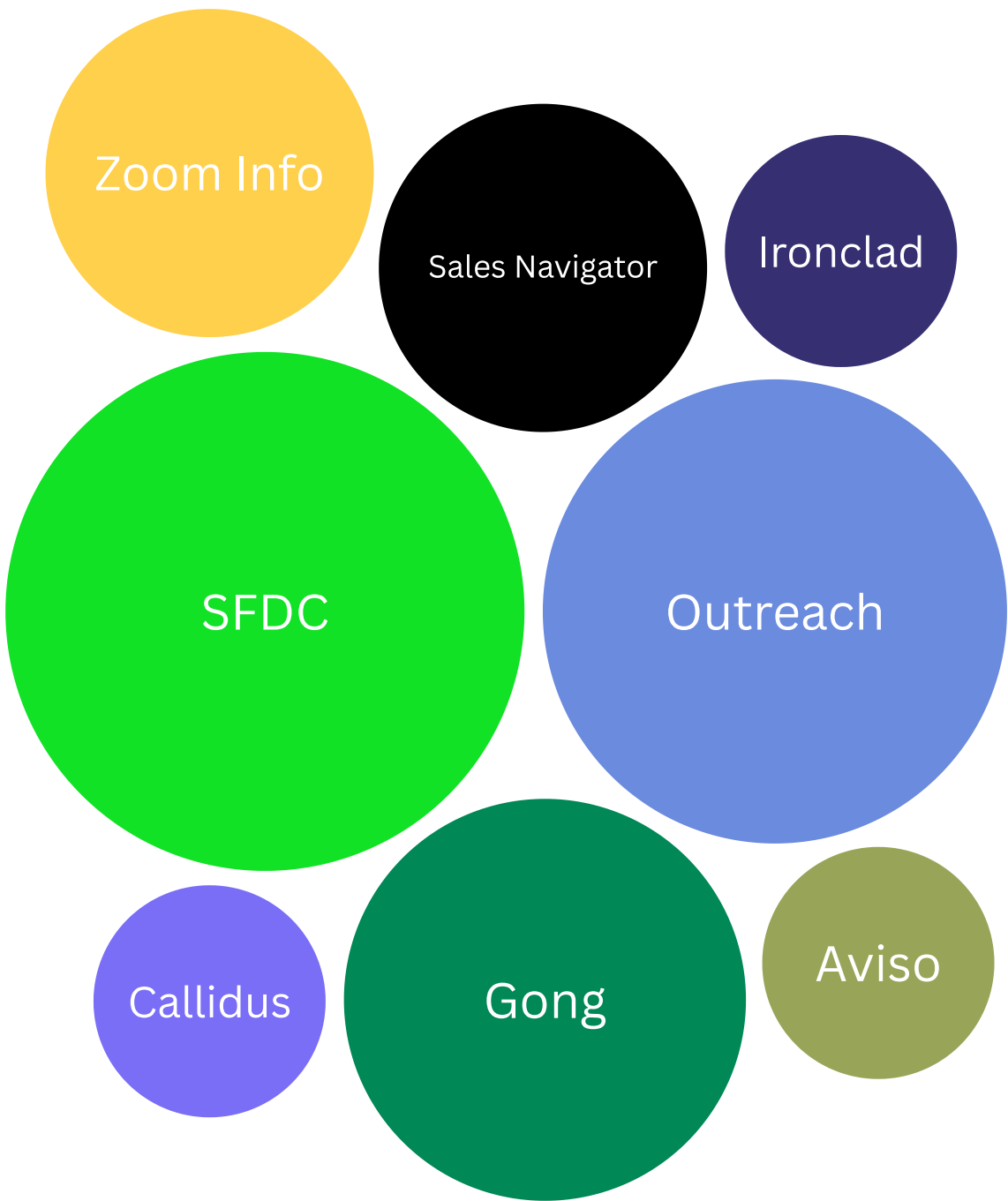
Scenarios

- High volume daily/weekly outbound prospecting at scale
- Managing a high volume of deals in a short time
- Quick valuable research on potential buyers
- Managing a high volume of non-ARR generating requests from customers that require manual, slow cross-functional interaction

Needs

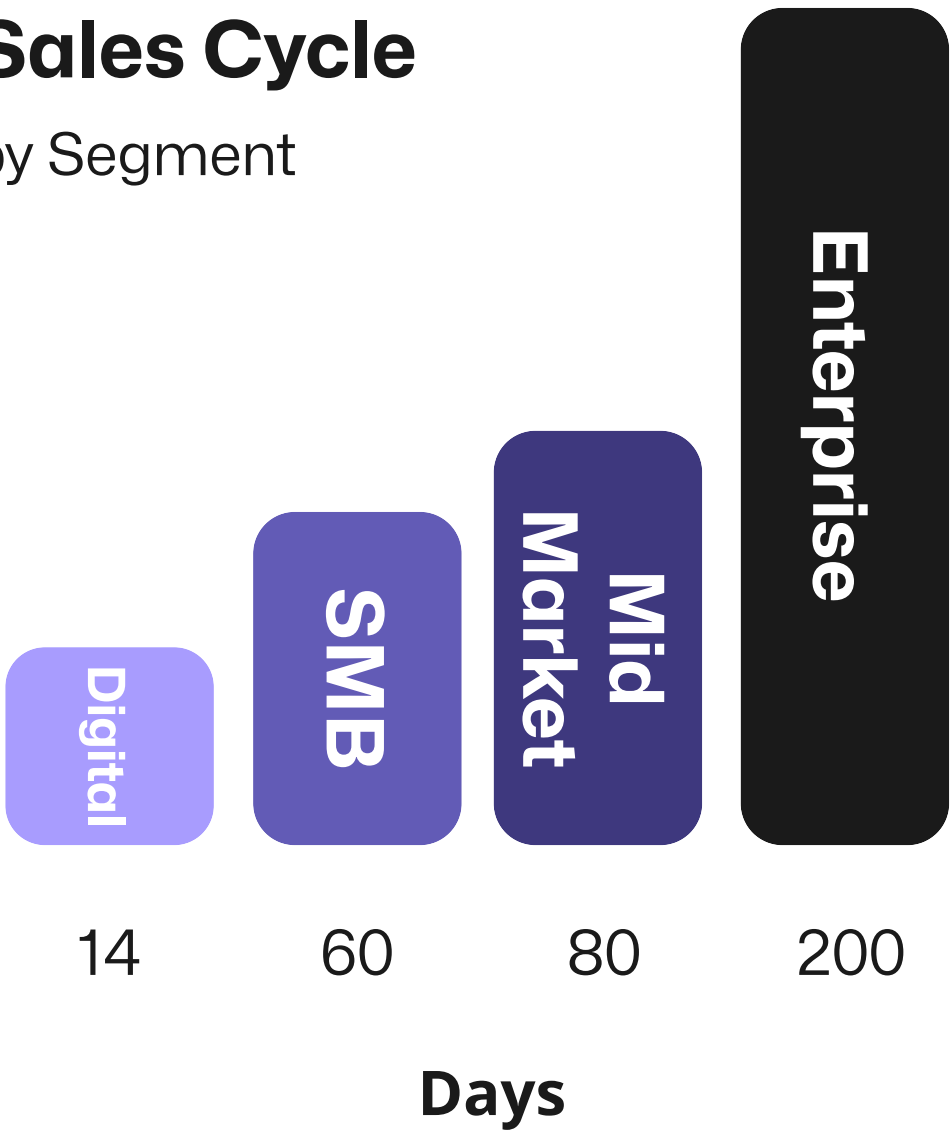
- Fewer manual processes
- Less context switching across sales tools
- Automated low-touch workflows
- Consistently reliable and clean SFDC data (for prospecting at scale)

System Usage



Sales Cycle

by Segment



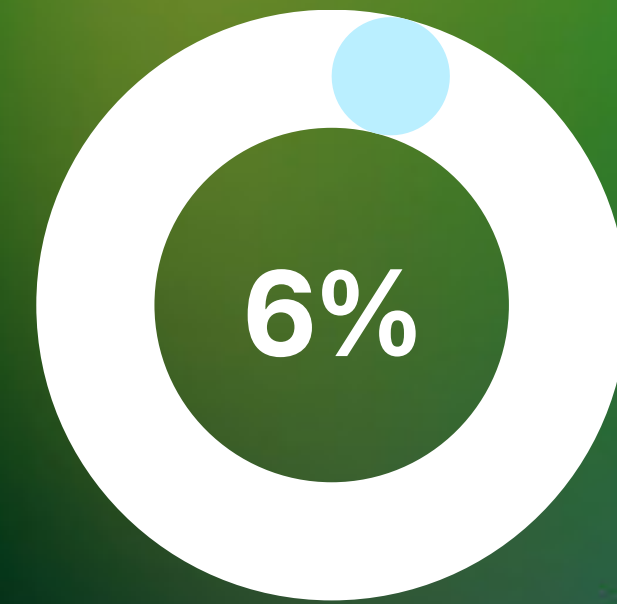


Hello, My Name is

Sam Benson

Pronouns He/Him/His
Occupation SDR, EBR
Location Portland, OR

% of Sellers



Background

"My world is high velocity with a focus on prospecting, qualifying leads, and setting up meetings for AEs. I do outbound cold calls, emails, and LinkedIn messaging and I follow up on inbound interest."

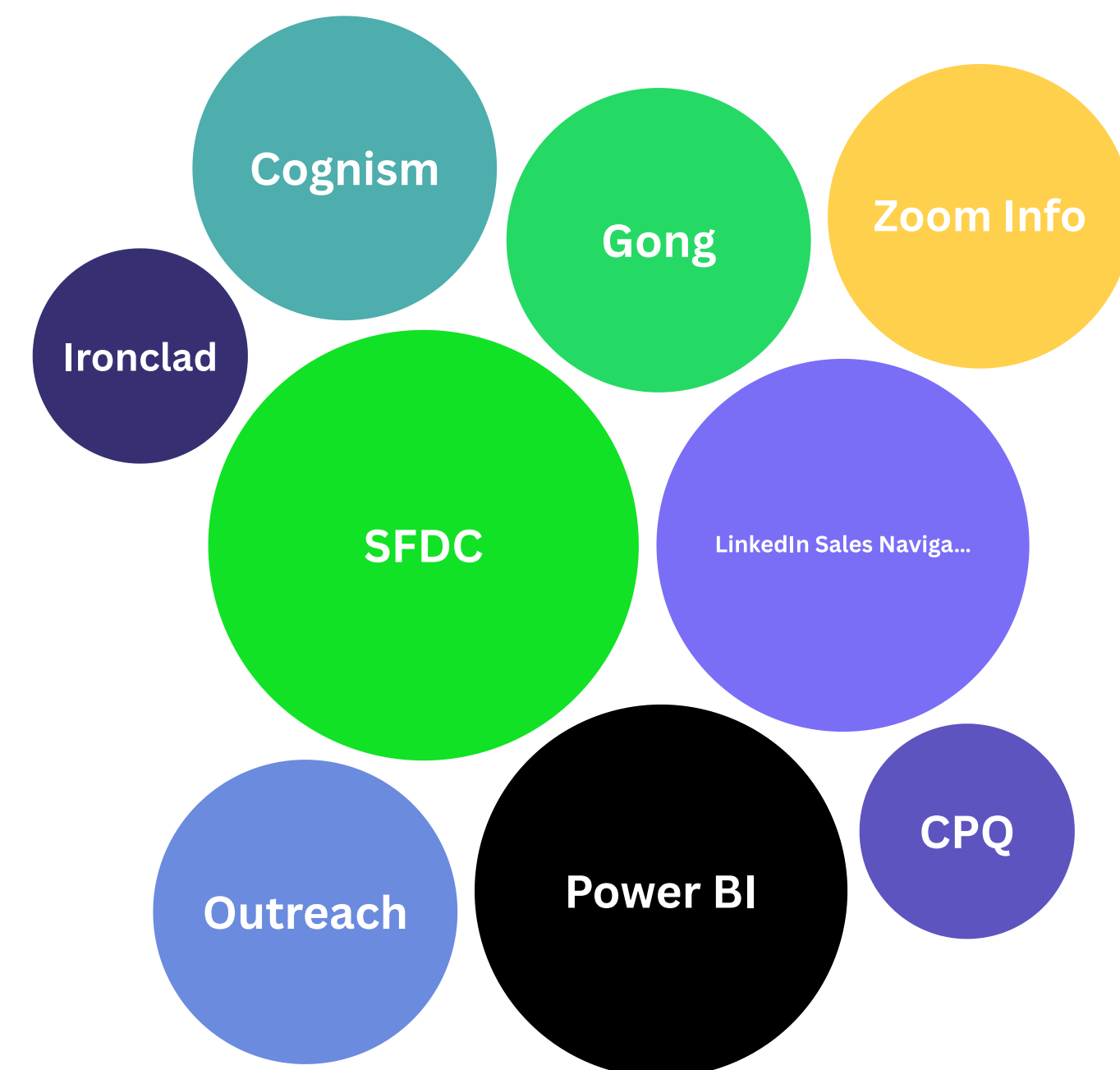
Goals

- Improve Speed to Lead
- Fast Lead Qualification
- Increase Meetings Booked
- Reduce Admin Tasks

Pain Points

- Poor SFDC Data Hygiene
- Manual Data Entry in SFDC
- Need to Log Into 4+ Systems for Customer & Prospect Data
- Manual SQL Validation Process

System Usage



Needs

- Real Time Prospect Engagement Alerts (EBR Only)
- Automated Sales Sequences (SDR)
- Clearer SDR/EBR to AE Handoff Process

Scenarios

- Cold Prospecting & Outreach
- Qualifying an Inbound Lead
- Scheduling a Sales Meeting for an AE

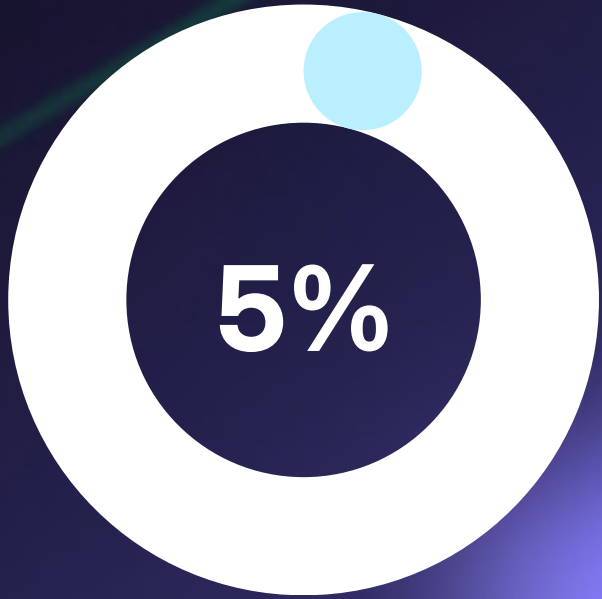


Hello, My Name is

Lisa Edwards

Pronouns She/Her/Hers
Occupation Renewals
Location Orlando, FL

% of Sellers



Background

"I manage a portfolio of Mid-Market & Enterprise accounts to ensure Net Revenue Retention working closely with CSMs & AEs. Most of my time is spent on contract negotiations, pricing adjustments, and renewal forecasting."

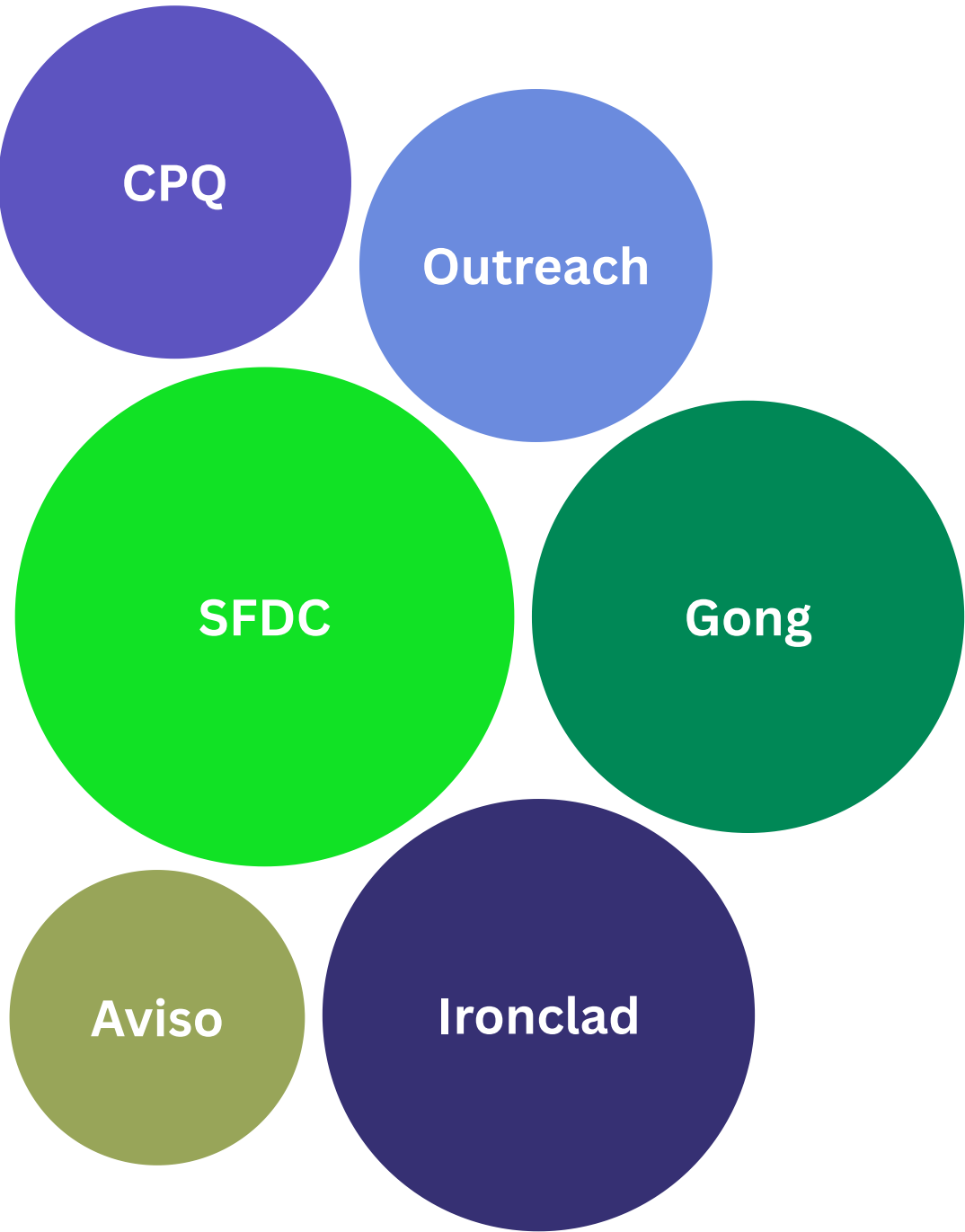
Goals

- 100% Renewal Rate - balanced by renewals & upsells
- Identify Expansion Opportunities
- Reduce Churn & Downgrades
- Streamline Contract & Pricing Adjustments

Pain Points

- Churn Surprises
- Inefficient Renewal Workflows
- Last Minute Renewal Scrambles
- Confusing Pricing & Discounts
- Data Silos Across teams

System Usage



Needs

- Automated Renewal Alerts & Workflows
- Self Service Renewal Portals (project in progress)
- AI powered Churn Risk Insights
- Seamless CRM & Billing Integrations
- Faster Approval Workflow

Scenarios

- Managing An Upcoming Renewal
- Handling a Renewal Pricing Objection
- Identifying a Cross Sell Opportunity
- Customer has full utilization with GHAS
- Renewal specialist is the customer success manager