



# **45-Day Plan**

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**Technical Account Executive**

# Day 1 - 15: Foundation and Immersion

*Goal: Accelerate the learning process to ramp up quickly & efficiently*

## Priorities

### 1. Onboarding & Immersion

- a. Begin onboarding and deep-dive into PostHog's products and services, problems solved, value propositions, target market, competitive landscape, ICP, and client base.
- b. Schedule meetings with cross-functional teams (Executives, Marketing, Product, & Engineering) to understand their roles and how we can best work together.

### 2. Sales Process Enablement

- a. Meet with Simon and Scott to understand our existing systems, tech stack, frameworks, processes, strategies, and best practices.
- b. Understand our customer journey map, sales process and stages, and the top reasons why deals are closed won & closed lost.

### 3. Product & Problem Enablement

- a. Identify the problems we are helping our current customers solve, the key features and solutions that solve these problems, and how.
- b. Identify all the personas we sell to and create a persona matrix that outlines their problems and how we help solve them.

### 4. Market Analysis

- a. Research the product analytics space, modern data stack, and review competitors, use cases, verticals, and industry trends.
- b. Begin creating a competitive analysis matrix.

### 5. Prospect Identification & Outreach

- a. Identify our ICP and develop an initial list of target accounts tiered 1-3.
- b. Understand our GTM tech stack, outreach processes, copy, talk tracks, best practices, and strategies, and begin initial prospecting to my list of target accounts.

## Measures of Success

- ☐ Meet w/ Execs, Marketing, Product, & Engineering
- ☐ Meet with the entire Sales Team
- ☐ Watch all calls from 5 closed won & closed lost deals
- ☐ Join 10 in-flight deal calls
- ☐ Create Persona Matrix
- ☐ Create a top 100 Account List
- ☐ Demo Certification

# Day 15 - 30: Strategy Development & Execution

*Goal: Focus on AE inputs while continuing to deepen my knowledge*

## Priorities

### 1. AE Process Management

- a. Reverse engineer Quota Attainment to understand my activity metrics and our sales stage conversion rates.
- b. Have a full grasp of PostHog's sales process including CRM hygiene, opportunity stages, pilot process, cross-functional collaboration, and pricing/commercials.

### 2. Account Management

- a. Develop detailed account plans for each account, outlining key objectives, growth strategies, potential upsell/cross-sell opportunities, and risk mitigation plans.
- b. Initiate meetings with my assigned accounts, begin relationship building by understanding individual and team objectives, and establish regular communication channels and check-ins.

### 3. Pipeline Generation

- a. Continue outreach and iterate on early email metrics, identifying working messaging and channels.
- b. Create a discovery call framework and begin taking initial discovery calls with prospects and PQLs.

### 4. Competitive & Industry Knowledge

- a. Deepen my understanding of direct and indirect competitors and PostHog's differentiators.
- b. Fully understand the vocabulary and problems we solve, becoming a product and problem expert.

### 5. Cross-Functional Collaboration

- a. Continue fostering relationships across PostHog, specifically marketing, product, and engineering.

## Measures of Success

- ☐ Take the lead on 5 SQL/PQL meetings
- ☐ Identify 2 upsell opportunities
- ☐ 3 new meetings
- ☐ Complete my quota formula
- ☐ Competitive analysis matrix
- ☐ Participate in my first pipeline review
- ☐ Participate in a company-wide event

# Day 30 - 45: Optimization and Scaling

*Goal: Begin contributing to topline revenue and optimize from early learnings*

## Priorities

### 1. Account Plans

- a. Begin executing account plans according to the strategy I developed.
- b. Continue cultivating relationships with my accounts, focusing on Executive Buyers and positioning myself as a trusted advisor and strategic partner.

### 2. Deal & Pipeline Progression

- a. Take ownership of the full sales cycle from introduction to closing for multiple accounts and progress deals forward through our stages.
- b. Expand outreach efforts to continue breaking into my target accounts with the identified messaging and channels that are working.

### 3. Performance Evaluation

- a. Evaluate my performance against quota, activity, and measures of success.
- b. Evaluate outreach metrics (i.e., response rates, meeting rates) and deal metrics (i.e., conversion rates across stages).

### 4. Documentation and Knowledge Sharing

- a. Document key learnings, best practices, and successes to continue fostering PostHog's culture of transparency, and continuous improvement.

### 5. Adjustments & Forward Planning

- a. Review my first 90 days with Simon Fisher, identifying improvement areas and adjusting strategies and processes for the next quarter.
- b. Adjust outreach and deal processes based on initial performance metrics and recorded calls.
- c. Be fully ramped by day 90

## Measures of Success

- ☐ Create and maintain my sales dashboard
- ☐ 5 additional meetings
- ☐ 2 additional self-sourced deals
- ☐ 3 POCs in flight
- ☐ RING THE BELL!
- ☐ Review outbound deal metrics
- ☐ Review 56-day performance
- ☐ Develop strategy for next 45 days and following quarter