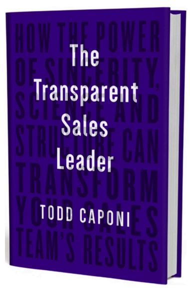


# The Transparent Sales / Revenue Leader

Your salespeople have a structure and framework for selling. Why don't your leaders?

Such a structure exists, used to plan, strategize, communicate, and see the holes before they form. Once internalized, your leaders will be 98% ahead of the rest of the revenue leadership world which doesn't have a structure. This live program teaches an easy-to-understand, internalize and implement structure, with each element optimized by science...and a little history!

This multi-part LIVE program (virtual or in-person) will help you build and maximize the revenue capacity of your teams while giving you the leadership life skills you can take with you for the rest of your career.

Each session can be done virtually (90 minutes each) or in person over a day (plus virtual reinforcement), where we reinforce and review actions from the previous session, dive deep into another concept, and then repeat. You can select three to six programs (Part 1 & Part 6, plus 1-4 more based on your priorities).

Each program can be recorded to turn into ongoing internal curriculum or any other internal use. Individual program syllabi follow.

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# Part One: The Revenue Capacity Framework

Duration: 90 Minutes

## Session Overview:

As a sales professional, we always had a process, a framework, a structure. As a leader? A framework didn't seem to exist, and as a result, most leaders feel more like a dog chasing a car down the street, never knowing what direction it's heading…instead of being in control. So, like a nerd, I created one - a framework for maximizing revenue capacity, optimized by behavior science, on a bed of transparency. I used it for everything - I could now see the holes before they formed, maximize the effectiveness of each element, and sound really smart, too (I could use all the help I could get)!

## Learning Objectives:

- Understand the five key responsibilities of a revenue leader.
- Learn to plan, strategize, communicate, and maximize team performance using the Five F's Revenue Capacity Framework.
- Gain the tools and mindset to maximize leadership impact.
- Develop a structure to ensure communication consistency with leaders, employees, teams, and board/investors.

## Session Outline:

Part 1: Introduction to the Revenue Capacity Framework - The Five F's

- Overview of the need for a framework in leadership.
- Explanation of the creation and benefits of the framework.
- The importance of behavior science and transparency in maximizing revenue capacity.

Part 2: Understanding the Element of the Five F's Framework

- Discussion of each of the five responsibilities.
- High-level discussion on how to optimize each responsibility for better team performance.
- Techniques for identifying and addressing potential issues before they arise.

Part 3: Application Strategies Discussion

- Practical application of the framework in real-life scenarios.
- Strategies for consistent communication with various stakeholders (leaders, employees, teams, board/investors) to drive alignment and performance.

## Materials Provided:

- Slides and handouts detailing the Revenue Capacity Framework.
- Communication templates for use with different stakeholders.

## Conclusion:

- Recap of the key learnings from the session and Q&A to address any remaining questions or concerns.
- Call to action for participants to implement the framework in their leadership roles immediately

# Part Two: Focus

90 Minutes

## Course Overview:

Your team's most valuable asset to convert to revenue is their time. A core responsibility of a revenue leader is to ensure their teams are working on the right opportunities, with the right types of customers, engaged with the right people within those companies, and aligned with the right prerequisites within those companies.

In what I referred to in my leadership roles as the "no science projects" policy, we'll begin by exploring what Focus truly is and the value of prioritizing it. We'll then work together to determine your Focus, and opportunities for you to use elements to improve deal qualification, increase deal sizes, improve win rates, and shrink cycle lengths through the concept of "Extreme Firmographic Focus Sprints".

## Learning Objectives:

- Understand the importance of focus in maximizing revenue.
- Identify and prioritize the right opportunities, customers, and engagements.
- Determine the optimal "Firmographic" "Demographic" and "Prerequisite" focus for your team.
- Implement "Extreme Firmographic Focus Sprints" to enhance performance metrics.

## Session Outline:

Part 1: Introduction to Focus
- Definition and importance of focus in revenue generation.

Part 2: Firmographic Focus
- Identifying the right companies, verticals, and geographies to target.
- Practical exercises to define your team's firmographic focus.

Part 3: Demographic Focus
- Identifying the right people in the right roles within target companies.
- Practical exercises to define your team's demographic focus.

Part 4: Prerequisites for Alignment
- Identifying attributes and circumstances that lead to better alignment.
- Practical exercises to define prerequisites for your team's focus.

Part 5: Extreme Firmographic Focus Sprints
- Introduction to the concept of "Extreme Firmographic Focus Sprints."
- Steps to implement focus sprints in your team.

## Materials Provided:

- Slides and handouts detailing focus strategies and concepts.

## Conclusion:

- Recap and Q&A to address any remaining questions or concerns.
- Call to action for participants to implement the learned focus strategies immediately.

# Part Three: Field: Building and Equipping the Right Sales Team

90 Minutes

## Course Overview:

The team that takes the field is the difference between success and failure in any leadership role. How do we know that we have the right people on the team, in the right places, with the right experience? How do we better illuminate alignment and potential performance in our recruiting efforts? We'll answer these questions in this session.

Once we have the right team, are they taking the field with the right resources supporting them? That's also a key role of the leader. We'll work on prioritizing these.

Lastly, we'll also look at the technology "sales stack" within your teams and provide a lens for how which ones should and shouldn't be invested in, along with an understanding of the true purpose of technology to support selling efforts.

## Learning Objectives:

- Understand how to assess and recruit the right team members.
- Prioritize resources to support your team effectively.
- Evaluate and optimize the technology sales stack for better performance.
- Gain a set of recruiting questions and criteria for evaluating potential team members.

## Session Outline:

Part 1: Assessing and Recruiting the Right Team

- Identifying the right people for your team.
- Evaluating alignment and potential performance in recruiting efforts.
- Sharing and discussing the ten questions used for recruiting.
- Participants share their favorite recruiting questions and criteria.
- Group discussion and creation of a comprehensive recruiting question list.

Part 2: Equipping the Team with the Right Resources

- Identifying and prioritizing resources to support your team.
- Group discussion on resource prioritization and best practices.

Part 3: Evaluating and Optimizing the Technology Sales Stack

- Understanding the technology sales stack and its components.
- Criteria for investing in the right technology tools.

## Materials Provided:

- Recruiting question templates and evaluation criteria.

## Conclusion:

- Recap of key learnings from the session and Q&A to address any remaining questions or concerns.
- Call to action for participants to implement the learned strategies in their leadership roles immediately.

# Part Four: Fundamentals: Ensuring Excellence in Sales Execution

90 Minutes

## Course Overview:

Once you've established your Focus and then built a Field team to best tackle that Focus, it's time to make sure that your Field organization is getting the right things right consistently. What are those right things? Your messaging & positioning, your pipeline development approaches, how you qualify & discover those opportunities, how you negotiate, and everything else that drives revenue.

In this session, we'll collaboratively collect what those priorities should be for your teams. We'll then prioritize them by organizational capability and discuss ways to make quick improvements in those problematic fundamentals.

## Learning Objectives:

- Identify and prioritize the key fundamentals that drive revenue.
- Develop a clear understanding of the team's current skill set and areas for improvement.
- Learn methods to make quick improvements in problematic areas.
- Understand how human beings learn and apply this to team training.
- Gain insights into the function of revenue enablement and how to leverage it for optimal results.

## Session Outline:

Part 1: Identifying Key Fundamentals

- Defining the critical fundamentals for revenue generation.
- Group exercise to collect and prioritize these fundamentals.
- Creating a simple chart to rank the team's capabilities in each fundamental area.
- Practical exercises to identify areas of strength and weakness.

Part 2: Making Quick Improvements

- Strategies to make immediate improvements in problematic areas.
- Group discussion on practical approaches to implement these improvements.

Part 3: Understanding How People Learn

- Overview of how human beings learn and retain information.
- Applying learning principles to team training and development.

Part 4: Revenue Enablement

- Introduction to the function of revenue enablement.
- How to invest in and leverage revenue enablement for optimal results.

## Materials Provided:

- Simple template for assessing team capabilities.
- Training and coaching tips based on learning principles.

## Conclusion:

- Recap of key learnings from the session and Q&A to address any remaining questions or concerns.
- Call to action for participants to implement the learned strategies in their leadership roles immediately.

# Part Five: Forecasting and Metrics

90 Minutes

## Course Overview:

Through the lens of the history of the sales profession, so many of our challenges today are the same as they were a hundred years ago - except for one - the revenue leader of the early 20th century didn't have as much trouble forecasting as leaders do today. They didn't have a CRM, they didn't have conference calls, they didn't even see their reps who were out selling in the field, and yet they were better able to predict than the modern revenue leader. How is that possible?

I figured it out! In a case of "what history got right that we got wrong", in my last role, we made simple shifts to our forecasting mindset, culture, and proactive metrics, and the results were stunning. For 6 quarters in a row, our 90-day forecast was never more than 3.5% off. We'll learn those lessons here!

## Learning Objectives:

- Understand the historical context of sales forecasting and its evolution.
- Learn the concept of the "Three Why's" to recognize buyer behavior.
- Implement buyer-centric forecasting into your approach.
- Master "The Results Formula" for prioritizing Key Performance Indicators (KPIs).
- Develop strategies to shift forecasting culture for better accuracy.

## Session Outline:

Part 1: Historical Context and Modern Challenges
- Overview of the history of sales forecasting.
- Comparison of early 20th-century forecasting with modern challenges.
- Identifying the root causes of modern forecasting difficulties.

Part 2: The Shift to Buyer-Centric Forecasting
- Introduction to buyer-centric forecasting.
- Simple ways to integrate buyer-centric methods into your forecasting approach.
- Two simple shifts to enhance forecasting culture.

Part 3: The Results Formula and KPI Prioritization
- Introduction to "The Results Formula."
- Using KPIs to diagnose issues proactively and prioritize coaching.

## Materials Provided:

- Template for implementing buyer-centric forecasting.
- Handout for understanding and using The Results Formula.

## Conclusion:

- Q&A to address any remaining questions or concerns.
- Call to action for participants to implement the learned strategies in their forecasting practices immediately.

# Part Six: Maximizing Engagement: The Science of Intrinsic Inspiration

90 Minutes

## Session Overview:

Are your reps coin-operated? The answer is "yes" - if you're doing it wrong. Everyone wins when we, as leaders, can create an environment where variable compensation becomes the reward for doing work we love, versus the motivator itself.

## Learning Objectives:

- Understand the P.R.A.I.S.E. model of intrinsic inspiration.
- Learn the six categories that drive true engagement and how to recognize and maximize each.
- Gain insights into creating environments where discretionary effort is maximized.
- Develop company-specific approaches to create a magnetic workplace.

## Session Outline:

Part 1: Introduction to Intrinsic Inspiration
- The problem with "coin-operated" motivation.
- The importance of intrinsic motivation for long-term engagement and performance.

Part 2: The P.R.A.I.S.E. Model of Intrinsic Inspiration
- Detailed explanation of the P.R.A.I.S.E. model.
- Exploration of each element and its role in driving engagement.
- Techniques and approaches to maximize each category in your organization.

Part 3: Practical Application and Company-Specific Approaches
- Practical exercises to apply the P.R.A.I.S.E. model in real-life scenarios.
- Developing a checklist encompassing the six categories that drive engagement.
- Creating company-specific approaches to foster a magnetic workplace.

## Materials Provided:

- Slides and handouts detailing the P.R.A.I.S.E. model.
- Checklists for practical application exercises.
- Techniques and templates for creating an engaging workplace.

## Conclusion:

- Recap of the key learnings from the session.
- Q&A to address any remaining questions or concerns.
- Call to action for participants to implement the P.R.A.I.S.E. model in their leadership roles immediately.

BIO:

Todd Caponi (CSP) fell into sales, and then fell in love with the decision science surrounding it. He turned that into a career encompassing multiple sales leadership roles, including building the revenue capacity of one tech company from the ground up into Chicago's fastest-growing, another where his efforts helped drive the organization to a successful IPO followed by an acquisition worth almost $3B, and another where his turnaround efforts were rewarded with the American Business "Stevie" Award for Worldwide Vice President of Sales of the Year.

His first book, *The Transparency Sale*, has earned international best-seller status, won three best sales book awards, and Book Authority has it listed as the #6 best sales book of all time. And his second book, *The Transparent Sales Leader* has won many awards including one from the Royal Dragonfly, the International Books Awards, and NYC's Big Book Award, along with a Silver Medal from Axiom's Business Book Awards. He now speaks and teaches revenue organizations about leveraging transparency and decision science to maximize their revenue capacity.