AMBITION

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Goal Management

Q1 Quota Attainment
Caroline Runner

Q1 Team Quota Attainment
Business Development Reps

Q2 Quota Attainment
Caroline Runner

Q2 Team Quota Attainment
Business Development Reps

Your Quick Start Guide to

Goals

With the Right Goals, Everyone Wins.

Goal-setting is critical to enhancing reps' performance — which has a direct impact on your bottom line. With goals in Ambition, leaders have an active lever to focus their teams' energy and provide visibility into goals and progress. That means you can keep teams on track, and reps can see how each activity gets them closer to success. (Bonus: this can all happen right inside your CRM if you're a Salesforce user.)

Four Quick Steps To Get Started With Ambition Goals

Not all goals are created equal. Setting the right goals at the team and individual level is critical for executing on your organization's strategy. They set your expectation of success for your team, and they give your reps insight into how they contribute to executive-level business objectives.

Setting up goals in Ambition is as easy as 1-2-3-4. Head over to the Goals section of the Administration tab to get started.

- **1. First, you need to decide if you're setting an individual goal or a team goal.**

- **Individual goals** are typically career-path driven. For example, an SDR may ask their manager how to become an AE. Their manager can then set goals, such as quarterly quota or objective goals, that give the SDR a clear path to career growth.

- **Team goals**, or group goals, are collaborative in nature. They rely on multiple people, such as the SDR team, or a cross-functional pod team of AEs, SDRs, and CSMs, working together to achieve something.

- Typically, team goals are stretch goals with a juicy incentive tied to goal achievement. These goals drive teams to work together to go above and beyond what's required of them individually.

Pro tip: Sales team members are natural hustlers, which may explain why we see many of them setting their own goals, as well. Setting personal ramp goals that exceed default ramp goals is a common scenario we see in high-performing reps, helping them stay ahead of the game.

2. Next, determine if you want this goal to be public or private. If the goal is open for anyone in the organization to view, public is your best choice. In most cases, we recommended making goals public to drive motivation, recognition, and accountability on the floor.

However, if the goal you are setting includes sensitive information, you may want to consider setting a private goal. For example, if you're working with a struggling rep on a performance improvement plan, setting a private goal to help that rep hit their next milestone is your best option. Note that anyone who contributes to that goal will be able to see it!

3. Think about the time frame for these goals. We recommend setting time frames of one month or longer. Shorter-term milestones, such as Weekly Meetings Set, are best encapsulated in activities (or objectives), as those are meant to be repeated day after day or week after week. Contrastly, goals should be long-term milestones that denote success for individuals or teams.

4. Put your goal to work! Make sure this goal is visible on your sales floor TVs and account dashboards. That transparency is what will help drive motivation and accountability on your team!

Get Inspired

To give you the jump start you need, here are some examples of goals our customers often set:

Individual SDR Goals

• X meetings set per month

• X outbound dials per month

• Points for creativity: Demandbase saw that including personalized videos in their outbound emails drove response rates through the roof. In addition to creating weekly activity scores based on video creation, they also created a goal for the SDR team to create 4,000 videos in Q1. We can't wait to see them blow it out of the water!

Individual AE

• X opps created per month

• X closed won opps per month

• X pipeline generated per quarter

• Annual quota attainment

Team/Pod Group

For teams, think revenue-focused, quarterly or annual goals, such as:

• Pipeline generated

• Revenue closed