

AMBITION

CASE

STUDY



HOW TO CREATE A
SUCCESSFUL SALES COACHING
FRAMEWORK

The SDR team at Outreach leverages their tech stack to focus on "The 4 Disciplines of Execution" as a framework to drive performance and hit targets.

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ABOUT

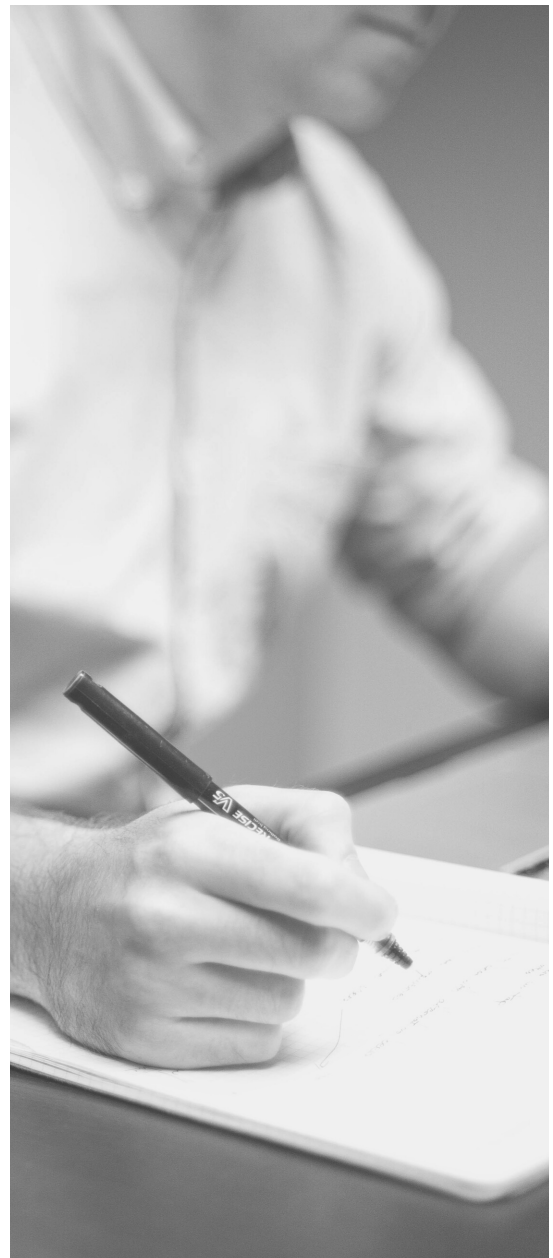


Outreach, the leading sales engagement platform, delivers performance and insights that result in higher velocity and more efficient selling for sales teams around the world.

Industry: Sales Tech

Headquarters: Seattle, WA

Ambition seats: 107



SCORING AND COACHING

The SDR team at Outreach borrows their framework from the book "The 4 Disciplines of Execution." Ambition is the tool they leverage to be their compelling scoreboard.

The Challenge:

The **Outreach Sales Development team** needed to evaluate their sales **tech stack** to help them execute on a new **sales coaching framework** they kicked off in 2020. Outreach leaned into "**The Four Disciplines of Execution**" by Chris McChesney to be **the blueprint** for how the sales organization wanted to achieve their sales goals. They needed to fulfill the disciplines of **keeping a compelling scoreboard and creating a cadence of accountability.**

The Solution:

Brooke Bachesta, **Sales Development Representative Manager at Outreach** needed to create a set of metrics and benchmarks that she could **dynamically score and coach her team around.** She needed her KPIs to be visible in order to fulfill the discipline of "**keep a compelling scoreboard.**" Brooke identified **Ambition** as the solution to her scoring needs. Another discipline essential to the new framework was centered around creating a "**cadence of accountability.**" Brooke knew she needed to coach her team in 1:1 formats that lean very heavily into **call coaching** methodology. By **embedding Chorus data into Ambition**, Brooke could utilize gamification of Ambition scoring and conversation intelligence of Chorus into **one place** to more easily execute on the 4 disciplines.

BENCHMARKS

How Outreach uses Ambition to dynamically update their SDR scorecard

SDR Activity Numbers

19 Contacts sequenced per day

85 Outbound dials per day

SDR Objective Numbers

25 Meetings set per month

12 Sales qualified leads per month

9 Sales accepted leads per month

Quote:

“Outreach relies on Ambition to be our compelling, visible scoreboard. The scorecards and leaderboards help with the *every day* coaching outside of our weekly Chorus call coaching sessions .”

— BROOKE BACHESTA, SALES
DEVELOPMENT REPRESENTATIVE
MANAGER, OUTREACH

HOW THEY DID IT

The Scorecard setup:

The metrics that the SDR team identified for leading and lagging metrics of success are as follows:

ACTIVITY

- *Outbound Dials* - weighted for **60%** of the score
 - Each SDR strives for **85 outbound dials** a day
- *Contacts Sequenced*- weighted for **40%** of the score
 - Each SDR strives for **19 new contacts sequenced** each day

OBJECTIVE

- *Initial Meeting Scheduled*- weighted for **50%** of the score
 - Each SDR strives for **25 meetings** per month
- *Sales Qualified Lead*- weighted for **25%** of the score
 - Each SDR strives for **12 SQLs** per month
- *Sales Accept Lead*- weighted for **25%** of the score
 - Each SDR strives for **9 SALs** per month

The Coaching and Leaderboard Setup:

- Weekly **call coaching** and **sequence reviews** powered by Chorus and Outreach data
 - Focus on what is being said on the connected call recordings and how that is successfully converting to the objective benchmarks
- Weekly, cross-team **role play**
 - High-converting peers can be matched up with those lower on the leaderboard for peer to peer role play
- Weekly, company-wide product training
- **Leaderboards** are broadcast on sales floor TVs for all of the **scorecard metrics**
- Leaderboards are broadcast for **conversion metrics** for how the dials and sequences are converting as well as **conversions** of the meetings further down the funnel into **qualified leads**



PRO TIP:

Keeping a leaderboard and coaching around conversion rate metrics like percentage of Meetings Set converting to Sales Qualified Leads helps ensure that your team is setting quality meetings.

CONCLUSION

Quote:

“For us, the developmental style of coaching felt forced. When we realized that data-based coaching centered on improving conversion rates was sparking excitement on our team, we embraced that. The Ambition and Chorus integration makes it easy for us to coach our way and fits perfectly with our 4 Disciplines framework.”

—BROOKE BACHESTA, SALES DEVELOPMENT
REPRESENTATIVE MANAGER, OUTREACH

To learn how **Ambition** can help, get
[demo at Ambition.com](https://ambition.com)

ABOUT AMBITION

The #1 sales performance software, **Ambition** transforms sales teams into revenue engines. From **coaching** and **analytics** to **TVs** and **contests**, our features make it easy for sales leaders to draw smart **insights from data**, and to **create a culture of success** on the sales floor — so that every rep can **drive revenue** in a powerful, measurable way.

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