SALES TEAM OVERVIEW

How We Work Together • Dec 2025

"Let's build this thing."

THE TEAM

ROLE	FOCUS	HANDS OFF TO	KEY METRIC
Joe (CEO)	Strategy, enterprise deals, escalations	—	Company growth
SDR	Cold outbound, booking qualified meetings	Sales	5 meetings/week
Sales	Discovery calls, closing deals	Customer Success	2-3 deals/month
Customer Success	Onboarding, retention, expansion	Sales (for expansion)	90%+ retention

THE FUNNEL

PROSPECTS — SDR identifies and reaches out

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MEETINGS — SDR books, Sales runs

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PROPOSALS — Sales qualifies and presents

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CLOSED DEALS — Sales closes

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CLIENTS — CS owns
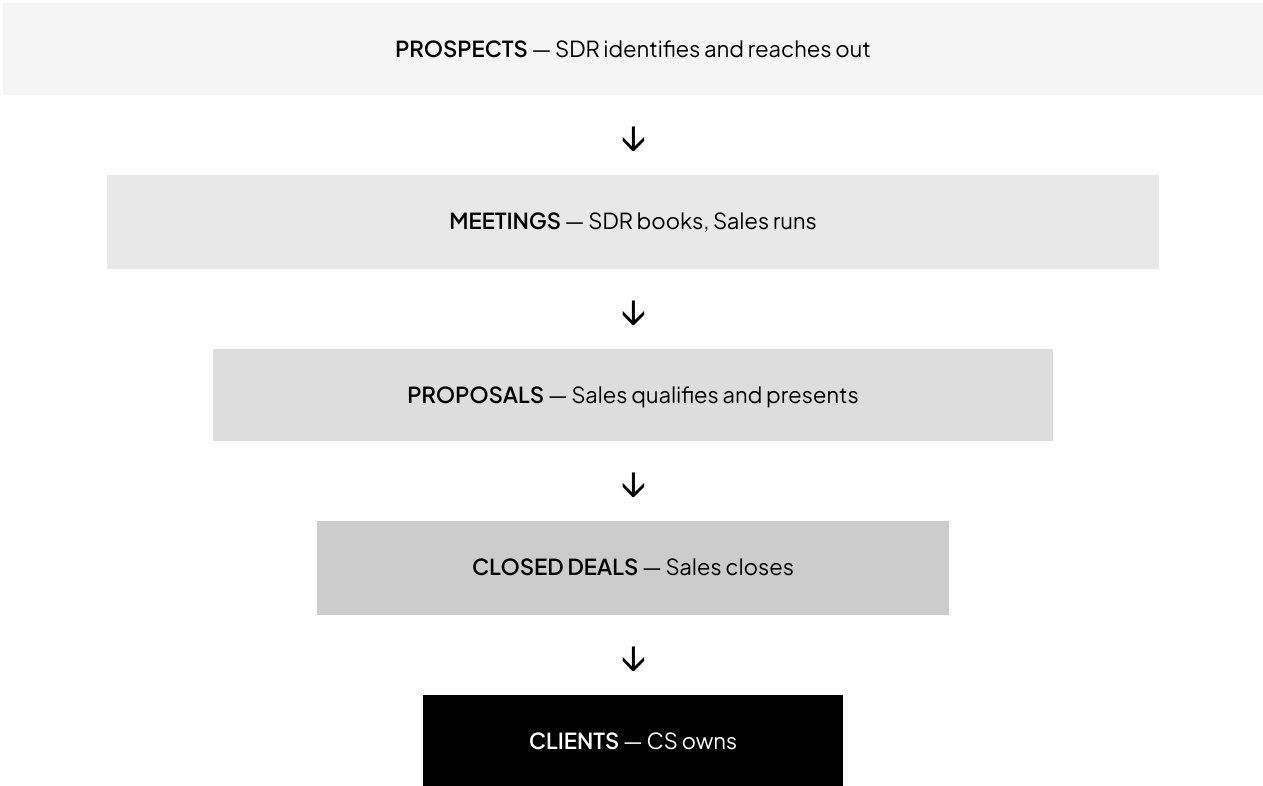
THE MATH

100 outreaches → 10-15 replies → 5 meetings → 2-3 proposals → 1 deal
At $5K/mo average = $60K ARR per deal × 2-3 deals/month = **$120-180K new ARR/month**

HANDOFF POINTS

SDR → Sales

WHEN	WHAT SDR PROVIDES	HOW
Meeting booked with qualified prospect	• Company name, website, industry • Contact name, title, email, phone • Company size (employees/revenue) • Pain points mentioned • Why they took the meeting	CRM entry + calendar invite to Sales

Sales → Customer Success

WHEN	WHAT SALES PROVIDES	HOW
Deal closed, contract signed	• Signed contract (terms, pricing, start date) • Contact info for all stakeholders • Discovery notes (pain points, goals) • Services purchased (specifics) • Promises made during sales process • Red flags to watch for	CRM handoff + internal Slack notification + intro email to client

Customer Success → Sales (for Expansion)

WHEN	WHAT CS PROVIDES	HOW
Expansion opportunity >$500/mo identified	• Current services and spend • Expansion trigger (what they said) • Relationship context • Recommended approach	Slack to Sales + warm intro email to client

CLEAN HANDOFFS MATTER

Every dropped ball costs trust. Take 10 minutes to document properly. The next person in the chain will thank you, and clients will notice the seamless experience.

WEEKLY PIPELINE MEETING

WHEN	WHO	DURATION
Monday, 9:00 AM	Joe, SDR, Sales, CS	30 minutes

Agenda

SECTION	TIME	WHO LEADS
Wins & Closed Deals	5 min	Sales
Pipeline Review	10 min	Sales (active deals, stuck deals, help needed)
Meetings This Week	5 min	SDR (what's booked, quality check)
Client Health Check	5 min	CS (any Yellow/Red accounts, expansion opps)
Blockers & Support Needed	5 min	Everyone

COMMUNICATION CADENCE

TYPE	CHANNEL	FREQUENCY
Meeting booked	Slack #sales + CRM	Immediately
Deal closed	Slack #wins + CRM	Immediately
Deal lost	CRM (with reason)	Within 24 hours
Client at risk	Slack #support + Joe DM	Immediately
Expansion opportunity	Slack #sales	Within 24 hours
Weekly reports	Email to Joe	Friday EOD

WHEN IN DOUBT, OVER-COMMUNICATE

It's better to share too much than too little. If something feels important or unusual, mention it. No one will fault you for keeping the team informed.

MONTHLY TARGETS SUMMARY

ROLE	PRIMARY METRIC	TARGET	SUPPORTING METRICS
SDR	Qualified Meetings	20/month (5/week)	100 outreaches/week, 10-15 replies/week
Sales	Closed Deals	2-3/month	15-20 calls, 8-10 proposals, 25-30% close rate
CS	Retention Rate	90%+	100%+ NRR, 0 surprise churns, 100% check-in completion

WHAT WE SELL – QUICK REFERENCE

SaaS + Automation ($2-4K/mo)

PRODUCT	PRICE
Growth Automation	$2,000/mo
Scale Automation ★	$2,500/mo
Total Automation	$3,500/mo
Automate Everything	$4,000+/mo

Managed IT ($3-6K/mo)

PRODUCT	PRICE
Managed IT	$3,000/mo
Managed IT Pro ★	$4,500/mo
Full IT Department	$6,000+/mo

Bundles (10% Discount) – The Sweet Spot

BUNDLE	INCLUDES	PRICE
Growth Bundle	Growth Automation + Managed IT	$4,500/mo
Scale Bundle	Scale Automation + Managed IT Pro	$6,500/mo
Enterprise Bundle	Total Automation + Full IT Dept	$9,000+/mo

CORE MESSAGE

"We handle the tech so you can focus on growing your business."

ICP QUICK CHECK

✓ **Yes:** $1-20M revenue, 10-75 employees, 3+ years old, no IT team, owner on call
✗ **No:** Insurance agencies, startups, solopreneurs, tech companies, "what's cheapest?" folks

RESOURCES

RESOURCE	WHAT IT'S FOR	LOCATION
SDR Daily Playbook	Outreach templates, qualification criteria, daily structure	[Link TBD]
Sales Playbook	Discovery framework, objection handling, closing process	[Link TBD]
CS Playbook	Onboarding, check-ins, expansion, renewal process	[Link TBD]
Product Brochure	Full service details and pricing	[Link TBD]
One-Pager	Quick reference for pricing and ICP	[Link TBD]
Qualification Framework	Detailed ICP and discovery questions	[Link TBD]
Positioning Guide	Talk tracks and call structure	[Link TBD]

KEY CONTACTS

WHO	ROLE	WHEN TO CONTACT
Joe	CEO	Enterprise deals, escalations, unusual situations
Support Team	Technical Support	Client technical issues

"Let's build this thing."

REMEMBER

We're building something here. Every meeting booked, deal closed, and client retained moves us forward. Stay consistent, communicate openly, and take care of each other. The numbers follow when the team works.