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HOW TO WRITE OKRS FOR SALES

A QUICK GUIDE FOR
SALES TEAMS

OVERVIEW

HOW TO WRITE OKRS FOR SALES

WHY YOU SHOULD READ THIS GUIDE

The popularity of OKR is in large part thanks to the simplicity of the framework. However if you're new to OKR getting started can sometimes feel like a struggle. This guide has been written to help Sales teams manage the start of their journey with OKR and Perdo.



THE PROBLEM

Nobody said sales is easy. No matter what you sell or what part of the sales cycle you manage, you're likely spending your day overwhelmed by countless tasks, accounts, and quotas. It's no wonder why so many start to feel overwhelmed.

Sure, many organizations have figured out approaches to scoring their opportunities, but will knowing which account to talk to next tell you if you're on the right track to achieving your team's goals? How can you make sure that what you're doing is actually helping the company achieve the ultimate goal its striving for?

THE SOLUTION

OKR and Perdo ensure you're working on the right things, at the right time. While you might have tools in place already that help track projects and accounts, Perdo solves a much bigger problem; how you define and measure your team's success.

All it takes is a few hours per quarter. By setting a few Objectives and Key Results, you create a record that allows you to validate the importance of each project you undertake and allows you to make sure you keep working on the right ones throughout the course of the quarter.

OKRs allow the best sales teams to run even better.



ABOUT PERDOO

The modern workplace is a complex collection of people and activities. Perdo is a goal management platform based on OKR that helps companies align work around team and company goals.

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WHAT IS OKR? THE BASICS

“I CAN’T CHANGE THE DIRECTION OF THE WIND, BUT I CAN ADJUST MY SAILS TO ALWAYS REACH MY DESTINATION.”

OBJECTIVE



Where do you need to go?

The answer is the Objective. It should set a clear Direction, like a destination does, such as New York.

- Beat last quarter's revenue growth
- Provide an awesome customer experience

KEY RESULT



How will you know you're getting there?

The answers are Key Results. See them as a GPS device. They tell you if you are getting closer to your Objective.

- Close €250,000 in sales
- Achieve an NPS score of 80

BEFORE YOU GET STARTED

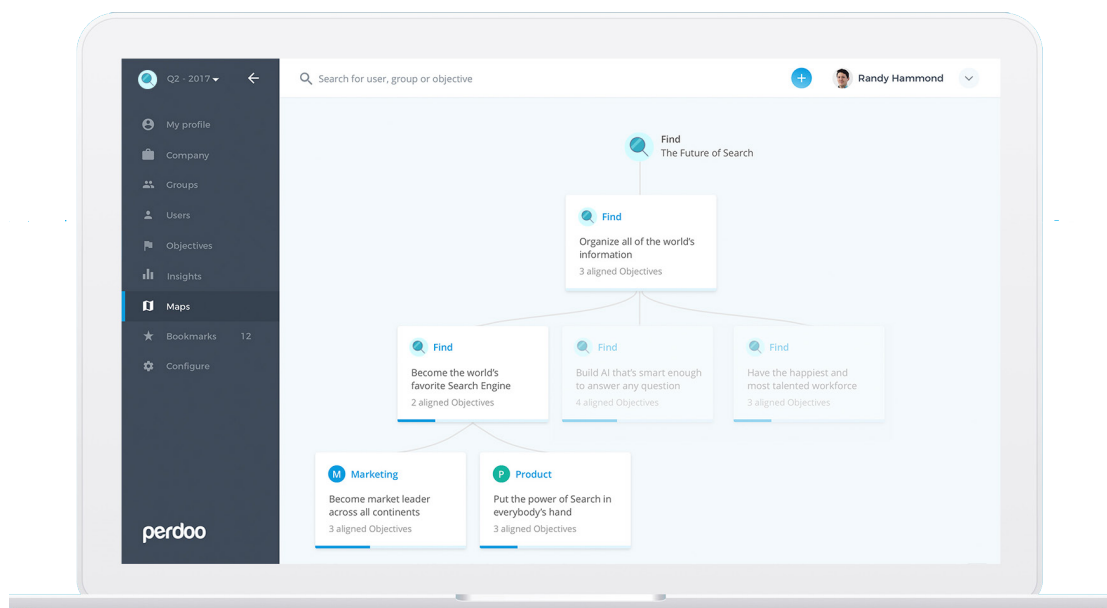
Before you set your first Sales OKRs, it's important to understand your Company-level Objectives. These are the goals your sales Objectives should ultimately be enabled, so you'll want to align to them.

You also need to establish a tactical cadence. Most teams work with 3-month cadences, and we recommend having no more than 4 at a time.

GATHER YOUR DATA

In order to write good results, you first need to have a set of metrics your team can track as they work on their Objectives.

If you already use KPIs in your Sales team, this is a great place to start; think of the criteria you typically track quarter after quarter and commit these as metrics for your OKRs. If not, think of the specific things you'd want to track in order to try and gauge your team's success



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EXAMPLE METRICS TYPES & CHANNELS



LEADS

- > Total number of leads
- > Number of new leads by month
- > Number of uncontacted leads
- > Number of contacted leads
- > Number of Sales Qualified leads
- > Marketing Qualified Lead to Sales Qualified Lead conversion rate



EMAILS

- > Number of emails sent
- > Number of replies recieved
- > Open rate %
- > Response rate %
- > Average response time



CALLS

- > Number of calls made
- > Number of call responses
- > Response rate %
- > Average call time



DEALS

- > Number of deals created by Month
- > Sales Qualified Lead to Deal conversion rate
- > Average deal value
- > Average number of products/ services per deal
- > Total deal value per month
- > Deal close rate



REVENUE

- > Net revenue generated per month
- > Gros profit per deal
- > Net revenue per product/service
- > Total discounts per month
- > Average discount % per deal



PIPELINE

- > Number of deals per pipeline stage
- > Conversion rate per pipeline stage
- > Average time to close

SERVICES

EXAMPLE TYPE: SaaS Company

STEPS: 5

Metrics for a common SaaS Sales funnel includes conversion rates between stages of Leads/Accounts as well as the total Annual Contract Value of each deal brought in.

These are typically found in a CRM like Salesforce, Pipedrive, or Hubspot.

PHYSICAL PRODUCTS

EXAMPLE TYPE: IT Hardwarde Provider

STEPS: 5

Most companies selling physical goods or services will track Accounts and their Purchase Orders, as well as their inventory numbers and profits made on each sale.

These are typically tracked in ERP systems like ADP, SAP, and Microsoft Dynamics



05 EXAMPLES

SALES OKRS



Below are a set of OKRs based on a fictitious IT Hardware company.

More examples can be found at perdoo.com/okr

Objective

BUILD A HEALTHY AND SUSTAINABLE SALES PIPELINE



Key Results

Achieve monthly pipeline of \$1M



Achieve 23% "Enterprise" deals

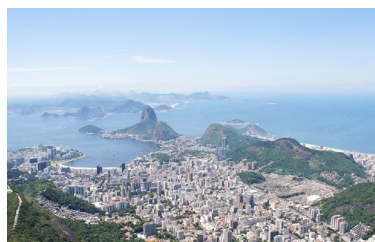


Increase total enriched leads to %75



Objective

INCREASE REVENUE IN LATAM REGION



Key Results

Sign 5 VIP accounts by end of Q2



Achieve 40% Enterprise new business



Increase lead to deal CR to 33%



Objective

ACCELERATE RECURRING REVENUE GROWTH



Key Results

Deliver \$1M in subscriptions by Q4



Increase customer MRR by 5%



MORE ON OKR

For more information on OKR visit our blog at www.perdoo.com/blog

Or download our eBook: How to Write Great Okrs at info.perdoo.com/okr-ebook

If you have any questions about this guide email us at hello@perdoo.com