

28 Ways to Drive (not Hope) for H2 Sales Success

The year is half over for most in the tech space — six months (or less) to achieve goal. Every commercial function now needs to re-prioritize their work. But this refocus can't wait until the mad-dash and hysteria that inevitably comes at year-end.

Q4 starts in Q3!

Here's a helpful checklist for actions to take now, and throughout the second half, to increase your odds of landing the year. As you review the list, consider what your team should be working on, as well as what you should be asking from your partners in other functions.

Sales Teams

The second half is the most tumultuous for sales teams. It's tempting to allow for a somewhat relaxed Q3 as sellers, clients, and prospects all take well-earned summer vacations. But that's a death knell for Q4. While it's true you can only maintain a 'crisis' mentality for so long, you need to start emphasizing formality, prioritization and focus in Q3 if you have any hope of surviving an amped up Q4 push.

Q3	Q4
<ol style="list-style-type: none">1. Make a last Sales push for new logos. New business has longer sales cycles, smaller ACV, and lower win rates than opportunities with existing clients. Q3 is realistically your last shot at new business before turning your attention to existing clients in Q4. Do your homework to build out specific penetration plans for a narrow set of candidates.2. (Re)install formal opportunity planning. You'll need the rigor to navigate increased deal volume. Start now by refreshing methodologies and re-establishing the use of formal deal plans. Line up coaches to help sellers build these plans.3. Unstick stalled deals. Identify opportunities that will run out of time (based on expected sales cycle) without additional focus. Act now before they get out of reach for the year. "No decisions" will doom your H2 forecast.4. De-risk the "must-wins." Typically, this will be a cross-functional effort and you don't want to wait until it's too late to assemble the team and start strategizing. Identify, and hedge against, all possible derailers.5. Reset expectations based on YTD performance. Work with each seller individually to agree H2 goals and avoid disengagement. Don't let a bad H1 become a bad H2.	<ol style="list-style-type: none">6. Strip down funnels. Aggressively scrub funnels of wish list deals. Focus only on those with real, in-quarter potential. This will require weekly, in-depth, pipeline reviews with each salesperson.7. Drive sellers to lose quickly. For 'maybe' opportunities, drive a mutual decision-point in the sales process where you and the client need to make a commitment. If you're going to lose (or punt a deal to next year), do it fast.8. Increase collaboration among, and across, sales and support teams. Sales leaders will be capacity constrained. So formally introduce ways to work with others on deals and share best practices. You can't count on it happening organically during Q4 mania.9. Involve deal coaches in opportunity planning and quickly narrow in on the most effective approaches for navigating buying processes. You won't have time to test and learn. Use deal plans to navigate buying processes for year-end commitments.



Sales Enablement

In the last half of the year, enablement morphs from driving methodologies and broad rollouts, to running office hours and tactical/practical support to working behind-the-scenes to prepare for the following year. Enablement's job is to worry about the things that sales managers just can't spare the time for.

Q3	Q4
<p>10. Deploy final training. Although Summer vacations in the northern hemisphere can be a hurdle, Q3 is realistically your last shot at broad rollouts of training. Choose wisely and implement in a way that handles PTO disruptions.</p> <p>11. Reinforce opportunity management. Refocus on opportunity management methodologies and tools (deal plans) to equip sellers to handle a huge influx of deal activity. This can involve redistributing planning tools, holding refresher training and assigning field coaches. The idea is to ensure that all sellers have a logical, customer-oriented approach to accelerating deals. (And if you don't have an official approach to opportunity management, see point 10!)</p> <p>12. Collect seller feedback. You'll be spending a lot of Q4 preparing your charter and budget for the upcoming year. But chances are you are going to get little (if any) mindshare from your sales teams as the year moves along. Survey sales teams and managers now to see what works, what doesn't and where they need more help. Voice of the seller is an invaluable input to the SKO and your annual enablement plan.</p>	<p>13. Move to office hours and deal rooms and away from full team-based training. Training moves into the informal realm in Q4. Help sellers execute methodologies and refine skills by partnering with them on specific opportunities.</p> <p>14. Build out the SKO. Sales kick-offs require an incredible amount of planning and replanning all the way up until the day they start. It's never too early to start work on SKO. Invest significant chunks of time in getting it right since it's one of the most expensive initiatives of the year. (Consider these tips to gut check your agenda.)</p> <p>15. Prepare to relaunch account planning. Q1 is account planning time. In preparation, build out a plan for updating (as needed) and relaunching your account plan template along with processes and skills. Don't forget to provide salespeople with the intelligence resources they need. (For more check out the complete guide to account planning.)</p> <p>16. Clean up content management systems - This is the perfect time for the enablement version of Spring Cleaning. Do a content audit to assess whether content is accurate/up to date, whether it's used by sellers and whether you have coverage for the entire sales process. (Above funnel content is different from mid- and bottom funnel content.)</p>



Revenue Operations

As the de facto analytics, process, and tool hub of the sales organization, RevOps teams must always work at least one quarter ahead of the field. This means prepping for Q4 mania in the dog days of Summer and spending Q4 working behind the scenes to ensure a smooth kick off to the following year.

Q3	Q4
<ul style="list-style-type: none">17. Tweak compensation plans, as needed, to drive desired Q4 behaviors. E.g., If quotas are now increasingly unrealistic, you can install Q4 goals and incentives to avoid 'sandbagging' behaviors.18. Identify high potential accounts based on historical spend and other characteristics. Which accounts are willing to invest unspent budget in Q4? What frame of reference will they have for previous deal terms? Are there "off-limits" segments?19. Start rationalizing the tech stack. What is underutilized? What needs integration into the workflow or with other tools? What analytics should be tracked? Collect seller insights now (before you lose their mindshare) so you can negotiate with vendors during Q4.	<ul style="list-style-type: none">20. Prep for BOY. Do all the analysis and modeling needed to kick off the following year with clean territories, rational quotas, and clear compensation plans. If restructuring and/or re-segmentation is on the table, this is the time to model the options and impacts.21. Run a Q4 deal desk to help configuring proposals, answering RFPs, and pricing deals to support the Q4 influx of opportunities. This may be a great collateral duty for RevOps team members to get up close and personal with go-to-market realities.22. Install forecasting tweaks. As the year progresses, there is less room for slippage. You may wish to request more frequent forecasts or assessments of "upside" from sales managers in order to increase visibility and prevent EOY surprises.23. Help sales leaders focus by identifying "must wins" and priorities among funnel possibilities. The surest path to success is focus. But especially if you are missing the number, it's hard to let anything drop from your funnel. Sales leaders need data-based assessments to help them make those tough decisions.

Marketing

Assuming a 4-7 month sales cycle (typical of tech sales¹), there's a limited window to find and close new logos. Marketing moves from lead generation to sales support to behind-the-scenes lead gen over the last six months of the year. The goal is twofold: help sellers fill their funnel (and close the opportunities within it by EOY) and build a backlog of nurtured leads for a strong Q1.

¹<https://emissary.io/enterprise-software-buying-process/>

Q3	Q4
<p>24. Make a last Marketing push for new logos. Sellers will be focused on opportunities that can close by year-end. Build campaigns that present a realistic combination of prospects (e.g., win-backs, new buying centers in existing accounts, previously engaged) and value propositions (e.g., solutions that can be piloted in short-order).</p> <p>25. Build an expansion ABM campaign for existing clients. Sellers' attention will naturally turn to existing clients in Q4. Existing clients will already have an MSA in place and opportunities may be easier to close. Start now by preparing account briefs to support Q4 account-based sales. Check out this playbook for using account intelligence to drive your ABM design.</p>	<p>26. Build a new ABM list. Use ideal customer profile and account propensity research to identify the next list of accounts appropriate for ABM. Do all the background work on vertical pain points (for 1: many campaigns) and start delivering seasonally appropriate messaging. Aim to warm accounts for a Q1 pursuit.</p> <p>27. Double-down on lead nurture. Sellers will be increasingly less likely to chase lukewarm or unqualified leads. Be prepared to more deeply qualify leads and nurture them until more sales capacity frees up.</p> <p>28. Revisit your GTM parameters. You'll undoubtedly be doing extensive annual planning (check out this playbook for ways to preserve your budget!). But, before you get into the nitty gritty of tactics and campaign costs, now is a great time to revisit your GTM. Refresh, as needed, persona profiles, ICP, target market definitions and do a collateral audit. Starting the year with a fresh perspective is a welcome boost for sellers who are just recovering from the Q4 chaos.</p>

The arrival of H2 requires every revenue and support team to do their part to ensure that sales teams not only have a successful H2, but also that they can start off the following year with a strong Q1. This checklist is just a subset of the work required. But it's a good reminder that functions should have a seasonality to their work, that no seller truly works alone, and that you can't wait until Q4 to start!

About Emissary

Emissary is a primary-sourced intelligence platform that provides revenue teams with first-hand insights into accounts, verticals, and buyers that just can't be found elsewhere. Browse our curated insights and connect directly with executives who recently left roles at Global 2000 firms. Sell and market smarter using the knowledge of former decision-makers in your target accounts. For more information: visit us at emissary.io, email us info@emissary.com, or connect with us on LinkedIn at [emissaryio](https://www.linkedin.com/company/emissaryio).

