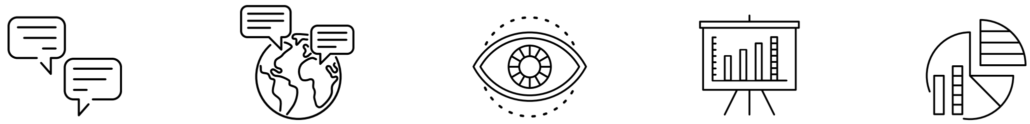
The revenue operations cadence

The Rep/Manager 1:1 Meeting

There are critical moments during every week, month, and quarter that define how you generate and accelerate revenue. We refer to these recurring points in time collectively as the connected revenue operations cadence.



1:1 meetings | **Weekly team meetings** | **Forecast calls** | **Board meeting** | **QBR**

The connected revenue operations cadence — a set of recurring meetings and group forums — can be the backbone of organizational alignment and consistent execution across your go-to-market teams.

At each 1:1 meeting, QBR, pipeline review session or forecast call, there are key questions you need to be able to answer quickly to drive your selling process and close more deals faster. When executed properly, with visibility and accountability across sales, marketing, and customer success, these moments can lead to improved and predictable top-line results—quarter-after-quarter. But, how often do you spend your 1:1 meeting, QBR, or forecast call debating the numbers or chasing down the status of deals instead of strategically discussing a close plan? That's where Clari comes in.

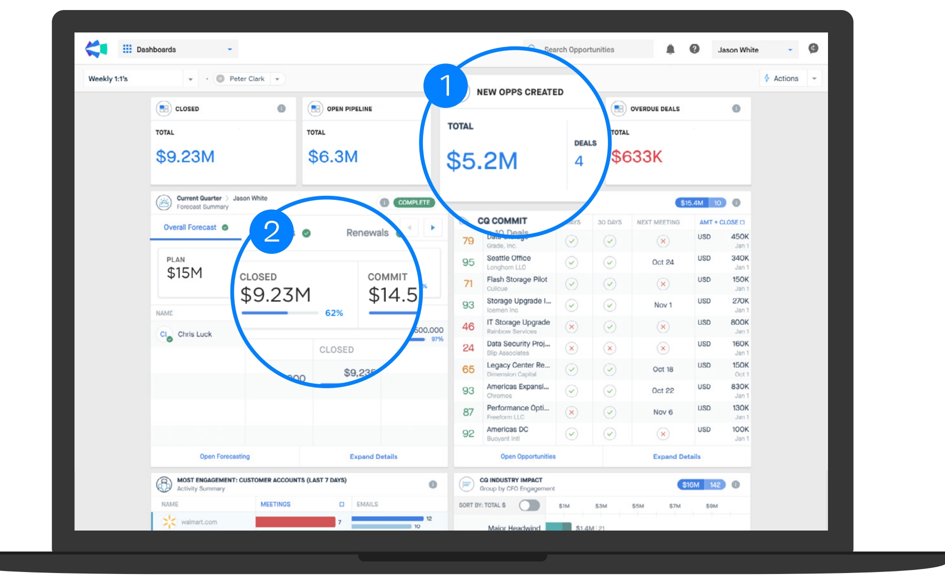
Are you missing your moment?

The 1:1 is your moment to set your reps up for success and focus their efforts on the opportunities that matter most. Too often however, first-line managers end up squandering valuable 1:1 time cross-examining reps on deal status, instead of coaching them on strategy. The time to inspect pipeline health and check deal progress is before your 1:1, not during. But if the data's just not there, what do you do? You get Clari.

How to run a more effective 1:1 in Clari

Skip the play-by-play and make your 1:1 about actions, not updates. In Clari, you can quickly access all the data you need on deals, rep activity, prospect engagement, and more for each member of your team—in real time. With instant insight into what deals are moving, stalled, or at risk, you can finally start focusing on strategy and helping your reps crush quota.

Step 1. Start with the big picture.
With Clari, you can actually prep for your 1:1 ahead of time because you have all the data you need at a glance. Start by reviewing your rep's progress to date and see where he stands for the quarter across key performance indicators.



1. Review closed deals, open pipeline, new pipeline creation, recent activity, and number of overdue deals

2. See how much business your rep already closed against his quota, and what he's calling in hard commit

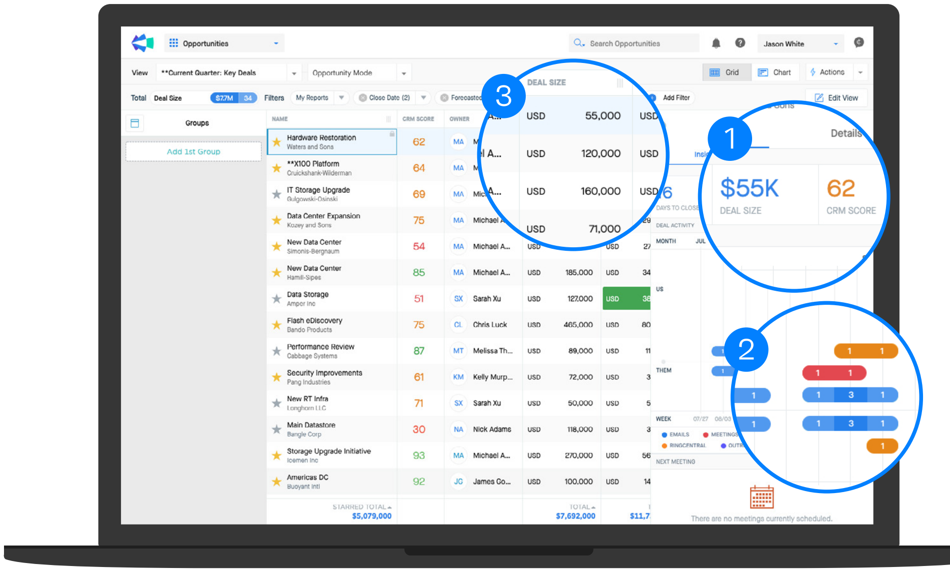
Step 2. Review deals and identify risk.

Now you can start drilling into your rep's pipeline to see which deals you may want to flag for discussion. You can view opportunities by size, close date, and more, to quickly assess what's on track to close and what isn't. Need a gut check? Look at the AI-driven Clari Opportunity Score to gauge risk on a specific deal. You can also identify where there's opportunity to pull deals into the quarter or deals that should be pushed out.

Clari also automatically tracks engagement—emails, meetings, and files exchanged—between the rep and prospect, removing the burden on reps to manually input activity data into the CRM.

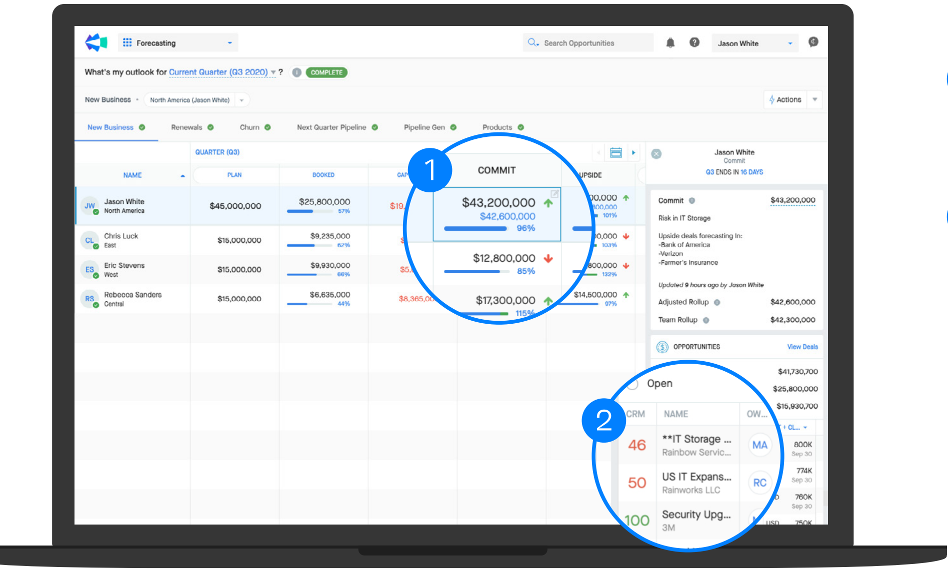
So, you no longer have to waste 1:1 time grilling your rep on what they've been up to—it's all right there. After only a few minutes in Clari, you're ready to have a productive and strategic conversation with your rep.

1. Leverage the Clari Opportunity Score to see which deals are at risk and why
2. Check to see if the prospect is still engaged (responding to emails and attending meetings) or if he's actually checked out
3. Look for opportunities with negative changes that might indicate risk, such as a decrease in deal size or a pushed out close date



Step 3. Evaluate the forecast and identify the gaps.

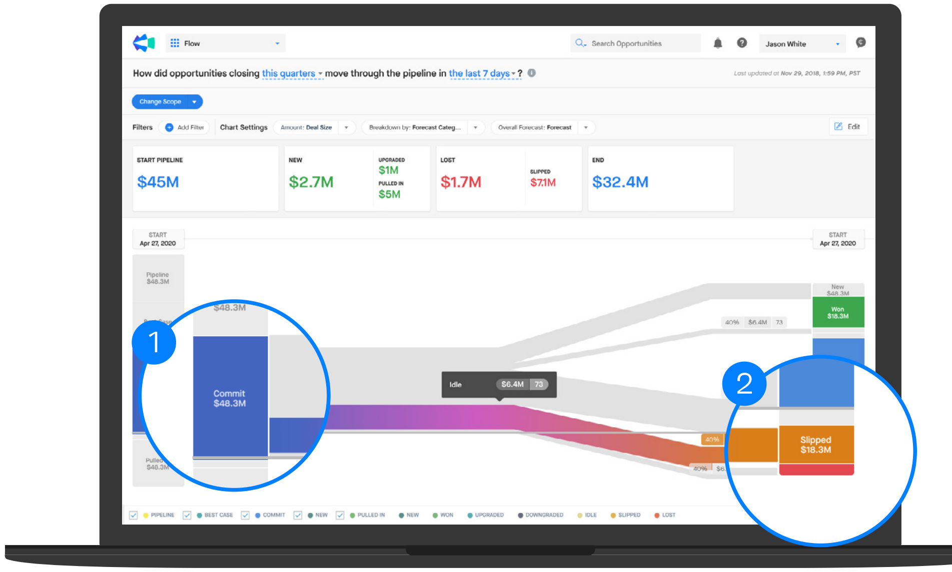
You did your reconnaissance in step 1, and now you can take a step back and look at the big picture: what your rep is calling, how much he's closed against his quota, does he have enough pipeline coverage to hit his number and is there also potential upside. Now you can talk about key opportunities and provide strategic guidance and coaching to make sure deals are actively progressing towards close.



1. Review your rep's quota, closed business, and hard commit forecast
2. Look at the opportunities driving the forecast to make sure your rep has enough coverage to hit his commit, and ultimately his own forecast quota

Step 4. Understand change and run plays.

From Clari, you and your rep can quickly review what's changed since your last 1:1, and zero in on the deals that slipped during the quarter. This is where you can talk strategy, walk through scenarios and options, and figure out your next play to possibly bring those deals in early next quarter.



1. Examine how the deals projected to close this quarter are moving through the pipeline this week
2. See how many deals slipped and evaluate where you may be able to pull a deal forward and maneuver a fast win

Skip the hours of play-by-play and focus on strategy

Request a free demo now so you can stop wasting time and start focusing on the deals that matter most.

Dropbox

—With Clari, the narrative on sales calls has switched from 'what the hell happened?' to 'what's going to happen?'

Yamini Rangan
Chief Customer Officer

Recorded Future

—Rep and manager 1:1s have become much more prescriptive with Clari. With closer alignment on deal statuses, managers can offer more strategy and valuable support.

Yin Chang
VP Sales Operations