Sales Enablement Hub

CONTINUOUS SALES ENABLEMENT TO WIN AT SCALE

Until we migrate all sales enablement content into our new training management system, you can find it here.

ALL INFORMATION IS COMPANY CONFIDENTIAL | DO NOT SHARE OUTSIDE eFILECABINET

Last updated June 21, 2022: Added link to new CPQ New Unit Price field training video from June 16

- [NEW SALESFORCE CPQ ENABLEMENT AND TOOLS](#)
- [WEEKLY MINI-ENABLEMENT SESSIONS](#)
- [Sales Kickoff 2022 - On-demand](#)
- [Product Training Videos](#)
- [Sales Operations](#)
- [MARKETING AND BDR RESOURCES](#)
- [Current North America Territory Map](#)
- ["Reason Lost" - Moving Opps to Closed Lost](#)

NEW SALESFORCE CPQ ENABLEMENT AND TOOLS

ON-DEMAND TRAINING

June 16: [CPQ - New Unit Price Field](#) (benefits all opps, but designed for amendments and renewals)

May 19: [CPQ Training Part 2](#) (expansion use cases, go-live training)

May 5: [CPQ Training](#) (new logo use case)

TOOLS and GUIDES

[Salesforce and Systems Training Folder](#) (includes CPQ folder)

[Reference sheet for products, bundles, pricing and approvals](#)

[CPQ High-level Walk Through and Instructions](#)

WEEKLY MINI-ENABLEMENT SESSIONS

On-demand recordings & upcoming schedule

ON-DEMAND RECORDINGS

Mixture of Zoom and Gong recordings; and Google Docs. Zoom recordings are now being stored in Google Drive. You may experience a one-to-two minute latency before videos start playing.

June 2: Sales Discovery 2.0

    and Slides

May 19: CPQ Training Part 2 (expansion use cases, go-live training)

May 12: Implementation and Professional Services

and Slides

May 5: CPQ Training (new logo use case)

April 7: Product Town Hall (passcode Z*v3wBNW)

April 7: LDAP Integration and Implementation Services

March 24: Sales Territory Planning

Territory Plan Template (Google Sheets)

    and Slides (Google Slides)

March 17: Optimal Deal Structure

    and Deal Structure Slides (Google Slides)

March 10: Product Town Hall (Active Directory, eFCO->Rubex, Rubex Reports) (password: KMW0ZCy^)

March 10: [Discounting Policies and Best Practices](#)

and [Pricing and Discounting Slides](#) (Google Slides)

March 3: [Working with Partners](#)

February 24: [New Rep-level Sales Pipeline Dashboards](#)

February 17: [Product Town Hall - Strategy and Roadmap](#) (slides only)

January 24: [Limited Seat Type](#)

January 12: [Winning with HR - ICP Part 1](#)

UPCOMING SCHEDULE

Subject to change based on sales input and needs

June 9: Rubex Reports

June 16: When, how and why to create an opportunity

Sales Kickoff 2022 - On-demand

Password for all sessions is "Liftoff2022"

Tuesday, Feb 8

[Liftoff 2022 | CEO Keynote](#)

[Comp Plans and Incentives](#)

[Why and Where We Win](#)

[Discovery and Solution Mapping](#)

[AND The New Perfect Pitch](#)

[ICP Focus: HR](#)

[ICP Focus: Accounting](#)

Wednesday, Feb 9

Extreme Ownership Keynote
(access expired)

[FinOps Delivering for Sales](#)

[Our Sales Tech Stack](#)

[Revenue Operations](#)

[CPQ Preview](#)

Product Vision and Roadmap
AND Rubex Product Training

Thursday, Feb 10

Customer Success Delivering for Sales

SMB Customer Onboarding

Strategic Customer Onboarding

Discussing Security with Prospects

Grow Fast: Marketing and BDR
Delivering for Sales

Growing ADS and Account Value

Continuous Enablement

Liftoff 2022 Recap and Close

Product Training Videos

Existing off-the-shelf product trainings from customer success, customer support and marketing

[17 brief product training videos created for SMB customer onboarding](#)

[Short customer training videos collected by Kevin and Chase](#)

Sales Operations

Handy tools, tips and training

[Tips and tricks for our sales tech stack (document shared in onboarding](#))

[Chili Piper Training Deck](#)

[Mandatory Reason Won/Lost Fields on Opps](#)

[Initial Apollo.io Training (March 15, 2022)](#)

MARKETING AND BDR RESOURCES

Marketing Collateral: [Rubex Cabinet](#)

Marketing Calendar: [Google Sheet](#)

Current North America Territory Map

"Reason Lost" - Moving Opps to Closed Lost

When moving an Opportunity into the "Closed Lost" stage, a few fields may be required, including:

- Reason Lost
- Sub Reason
- Reason Detail
  - *Only required if specific values for Reason Lost are selected

It is important that users understand the differences and definitions of these reasons. Please see the table below:

"Reason Lost"	"Sub Reason"	"Closed Lost Detail"	Notes/Definitions
Legacy End of Life	Internal Server Errors	(optional)	We received server errors
	Customer Corrupted Files	(optional)	The customer had corrupted files
	Firewall Issues	(optional)	The customer had firewall issues
	Misunderstanding	(optional)	The customer misunderstood what was happening with migration (*i.e. they thought we were going out of business instead of just sunsetting products*)
Buying Committee	Out of Business	(optional)	
	Acquired/Sold Business	(optional)	Our current customer is no longer associated with the business but there is an opportunity to prospect new management.

	Disconnected	(optional)	You were ghosted or were no longer able to get in touch
	Champion Left Company	(optional)	
	Procurement/Legal	(optional)	
Customer Requirements	Only Wants Storage	(optional)	
	Outside our Product Scope	(optional)	**Do not confuse this with a product limitation**. When the customer's requirements are outside our product scope, this means something they are wanting is not something our product does and likely will never do. (i.e. they are looking to purchase a used car and that is not what our company does)
	On-Prem Requirement	(optional)	
	Timeline Too Far Out	(optional)	
	Budget/Pricing	(optional)	
	Consolidation	(optional)	The customer is consolidating their tech stack.
Product - Limitations	Functionality Missing	*required	**Please elaborate on the product limitation; not to be confused with a bug/technical challenge NOR product scope.** This should be selected when there is something our product c*ould* do but doesn't today.
Product - Technical Challenges	Bug/Something Not Working	*required	

	Downtime/Not Stable	*required	
	Slow Product Experience	*required	
Service Issues	Customer Education	*required	
	Onboarding Expectations	*required	The customer did not finish onboarding or did not receive the onboarding experience they expected.
	Support	*required	
Adoption	Product Utilization	(optional)	The customer did not use the product enough.
	License Utilization	(optional)	The customer's end users did not use the product enough.
Auto-Terminated	Customer Cancelled	(optional)	**NEVER to be selected by users; this is selected by automation in Salesforce**
Duplicate Opportunity	Duplicate Created by Mistake	(optional)	When a duplicate opp was created by mistake (by a user or by the system)