

Quarterly Business Review

Enterprise Sales

Rep Name

Date

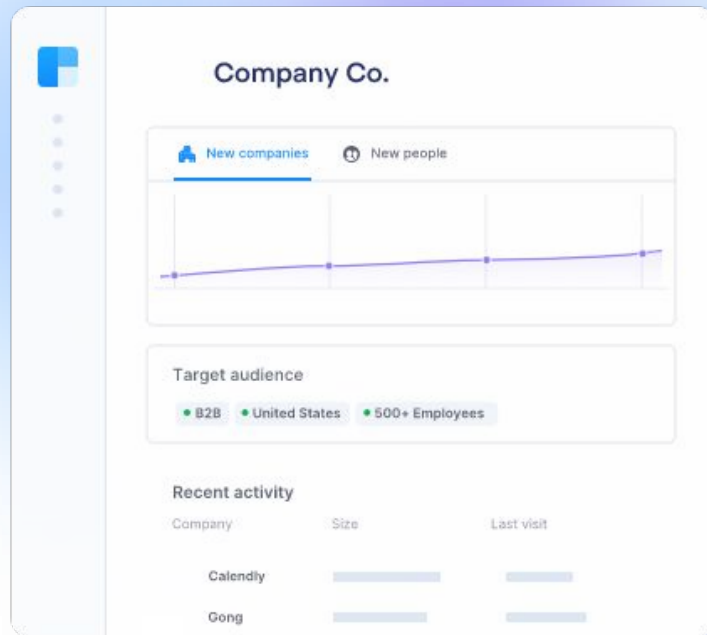


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De-anonymize Website Traffic



Create Prospect Audience



Enrich New Leads



Ilya Volodarsky

Fit: Good

Company

Job Title

Seniority

Industry

Co-Founder

Internet Software

100+ business attributes



Refresh Customer Data

Q2 Retrospective

Closed Won Deals: What went well and why?

- *What motivated prospect to buy?*
- *What did you do that you want to continue?*

Account:

Account:

Account:

Lost Deals: What could you have done differently?

- *Of the lost deals in commit, what are key learnings you had?*
- *What can you plan to do differently moving forward?*

Account:

Account:

Account:

Other: Other key takeaways or lessons learned?



Q3 Game Plan: Account 1

How will you win?

What are the key actions will you take to grow engagement and nurture this account?

Risks

What are key risks for each account and how do you plan to mitigate each risk?



Q3 Game Plan: Account 2

How will you win?

What are the key actions will you take to grow engagement and nurture this account?

Risks

What are key risks for each account and how do you plan to mitigate each risk?



Q3 Game Plan: Account 3

How will you win?

What are the key actions will you take to grow engagement and nurture this account?

Risks

What are key risks for each account and how do you plan to address each risk?



Q3 Summary

Commit: (\$XXXXK)	Key Accounts:
Most Likely:	Key Accounts:
Best Case:	Key Accounts:
Additional Notes: (what's the plan to hit the number?)	



Key Asks

Dependencies:

What do you need from internal stakeholders (i.e, product, marketing, enablement) that will move the needle across your book of business?

Please prioritize your asks.

- 1.
- 2.
- 3.

