Alex Rivera | 1:1

with Morgan Reed · Week of April 20, 2026 · 12 of 22 selling days done · 10 left

Where You Stand

PRODUCTION PACING

Metric	MTD	Goal	Pace	On Track?
Booked ARR	$31,540	$63,900	49%	Watch
Wins	21	33	64%	Yes
Demos Held	52	44	118%	Yes
Opps Created	56	56	100%	Yes

ACTIVITY

Metric	MTD	Goal	Pace	Daily Avg
Calls	154	440	35%	8.8/day
Emails Sent	518	—	—	43.2/day
Self-Sourced Opps	37	36	103%	—

EFFICIENCY

Metric	Yours	Goal	Status
Opp to Demo	93%	77%	Above
Opp to Win	38%	59%	Below
Demo to Win	40%	—	—
Avg ARR / Opp	$1,472	$1,800	Below

Last Week: Forecast vs Actual

Deal	Forecast ARR	Actual	Outcome
Cedar Ridge Retail	$2,940	$2,940	Won, full bundle (Core + Engage)
Ironwood Manufacturing	$3,000	$0	Slipped, revisit after budget reset
Brightline Media	$1,500	$0	Pushed to this week, agreement out

Areas Behind Pace

Booked ARR (49% pace): Currently $31,540 of $63,900. What deals move this week?

Calls (35% of goal): 154 of 440 MTD. What does your prospecting block look like?

ARR/Opp ($1,472 vs $1,800): Focus on attaching a second module or going deeper on existing deals.

Your Forecast

Week forecast (next 7 days): $15,000

Month-end forecast: $54,000 committed / $63,900 stretch

DEALS I EXPECT TO CLOSE THIS WEEK

Deal	ARR	Stage	What needs to happen
Westvale Group	$4,527	Demo Complete	Agreement out today, verbal yes, close by Thursday
Halcyon Systems	$3,348	Demo Scheduled	Hold demo Tue, same-call close
Twin Oaks Retail (2 sites)	$3,774	Agreement Sent	One signature, bundle both sites

Coaching Focus

Pick ONE area to improve this week (SMART goal):

Skill area: Consultative discovery and multi-module selling (platform sell, not single-product)

What specifically I will do: Run full discovery on every demo before positioning price, and surface one pain that maps to a second module (Analytics, Automation, or Engage) so I present a bundle, not a single SKU.

How I will measure it: Attach a 2nd module on at least 3 demos this week, and move avg ARR/Opp from $1,472 toward the $1,800 goal.

By when: Friday 4/24, reviewed at our next 1:1.

Areas to consider: discovery, closing commitment, objection handling, demo quality, prospecting, pipeline management, premium positioning, deal qualification, bundling.

Pipeline Snapshot

Account	ARR	Stage	Close	Next Step
Westvale Group	$4,527	Demo Complete	4/30	Agreement out today, sign by Thursday
Halcyon Systems	$3,348	Demo Sched	4/30	Hold demo Tuesday, same-call close
Ridgeline Partners	$1,910	Demo Complete	4/30	Re-engage owner, agreement out by Weds
Twin Oaks Retail — Site A	$1,887	Agmt Sent	4/30	Bundle with Site B (same owner), get signature
Twin Oaks Retail — Site B	$1,887	Agmt Sent	4/30	Bundle with Site A, get signature
Metro Logistics — North	$1,050	Agmt Sent	4/30	One DM across all 3, confirm go-live date
Metro Logistics — Central	$1,050	Agmt Sent	4/30	Include in the 3-site signature
Metro Logistics — West	$1,050	Agmt Sent	4/30	Include in the 3-site signature

13 open opps, $20,759 total · Commit: $0 · Upside: $0 | **Stale deals: 0. Clean board.**

Action Items

ALEX'S COMMITS FOR THIS WEEK

- **20+ dials/day in-seat, logged.** Build a backup pipeline behind the 8 open agreements. The gap is activity, not closing.
- **Full consultative discovery on every demo**, then attach a 2nd module (Analytics / Automation / Engage) on at least 3.
- **Close Westvale + Twin Oaks (both sites) + Metro Logistics (3)** by Thursday, and hold the Halcyon demo to a same-call close.

MORGAN'S COMMITS

- Jump on the Westvale and Halcyon closes with you if a second voice helps. Get you the **Premium ROI calculator (7:1)** and the renewal-risk objection one-pager before your next demo.
- Chase the billing / onboarding fix so your at-risk premium-module customer stays live and attached.

Notes

Strong funnel, thin board: Demos 118%, Opps 100%, Opp-to-Demo 93%. Top of funnel is not the problem. The board is clean (0 stale) but thin, so protect it with activity.

Two real gaps: Calls at 35% (activity) and deal size (ARR/Opp $1,472 vs $1,800, Opp-to-Win 38% vs 59%). Coaching focus is bundling because it moves Booked ARR (the Watch) the fastest. Calls is the hard activity commitment above.

On the number: $31,540 of $63,900 at the halfway mark, 10 selling days left. You called $46K by Friday, stretch to quota. Love the discipline, but stretch is not a plan. Committed path to $54K, real path to $63.9K if the agreements sign this week.

Watch item: the premium-module customer threatening to downgrade. Confirm the credit-back until go-live so we save the attach.