

WARM-UP • 30 SECONDS EACH • NO REPEATS

Best trip you took all summer. Go.

Quick lap around the room, 30 seconds each, winner gets bragging rights.
Then we go to work.

APEX SALES

9 days left. \$314K on the table. Let's go get it.

Day 14

OF 23

9

SELLING DAYS LEFT

30%

TO QUOTA

Apr 20

2026



Scoreboard

APRIL MTD • BOOKED ACV

REP	ARR	QUOTA	ATTAINMENT	PACE	STATUS
Sarah Chen	\$54,344	\$62,000	88%	175%	Crushing
Alex Rivera	\$22,510	\$62,000	36%	73%	Climbing
Marcus Rodriguez	\$15,566	\$62,000	25%	50%	Pacing
Jordan Blake	\$13,428	\$95,000	14%	28%	Behind
Priya Patel	\$12,592	\$62,000	20%	43%	Behind
Dakota Morrison	\$7,782	\$42,000	19%	37%	Ramp
Taylor Nguyen	\$7,211	\$62,000	12%	23%	Behind

Day 14 of 23 (61% of the month gone) • Team at \$133,434 / \$447,000 = 30%. We should be near 60%. We're at half that. Good week (+\$47.9K), but \$314K left in 9 selling days.

Apex Sales — Sales Manager OS • Illustrative sample, fictional data



Weekly Forecast

REP	MTD	PACE	 LOCK	 STRETCH
Sarah Chen	\$54.3K	175%	—	—
Alex Rivera	\$22.5K	73%	\$46K	\$62K
Marcus Rodriguez	\$15.6K	50%	\$45K	\$65K
Jordan Blake	\$13.4K	28%	—	—
Priya Patel	\$12.6K	43%	\$27K	\$80K
Dakota Morrison	\$7.8K	37%	—	—
Taylor Nguyen	\$7.2K	23%	\$30K	\$62K

Lock = closing this week, no question. **Stretch** = real deal, needs a push. Can't name it? Doesn't go on the board.



Wins & Recognition

+\$47.9K

Best week of the month

Team went \$85.5K → \$133.4K. 19% → 30% in seven days.

WHO MOVED

- ◆ **Alex Rivera** — mover of the week, doubled to \$22.5K, 21 wins (most on team), 25 self-source opps.
- ◆ **Sarah Chen** — \$54.3K, 88% to goal, 175% pace. Still the engine.
- ◆ **Marcus Rodriguez** — 101 dials last week, only rep over the bar.
- ◆ **Jordan Blake** — 39 self-source opps MTD, most on the team.

MOVER OF THE WEEK

Alex Rivera

\$10.0K → \$22.5K · 21 wins

TOP PERFORMER

Sarah Chen

\$54,344 · 88% · 175% pace

HUSTLE AWARD

101 dials

Marcus Rodriguez — only rep over 100

Activity Snapshot

LAST WEEK • GOAL = 100 DIALS/WK

REP	DIALS	GOAL	%	CONVOS	EMAILS	SS OPPS MTD
Marcus Rodriguez	101	100	101%	17	74	3
Taylor Nguyen	61	100	61%	7	55	10
Alex Rivera	35	100	35%	23	518	25
Dakota Morrison	15	100	15%	2	0	3
Priya Patel	15	—	In TAM	3	7	19
Sarah Chen	13	—	000	3	2	14
Jordan Blake	0	—	000	3	0	39

We don't have a closing problem. We have an activity problem.

The wins this month are coming off pipeline we built weeks ago. That well runs dry fast. Last week, of everyone in the seat, exactly one rep hit 100 dials. That is the whole reason we're at 30% instead of 60%. Not talent. Not the market. Phone time.

20

**DIALS A DAY.
EVERY DAY.
NON-NEGOTIABLE.**

Key Deals

Agreement Sent Jordan Blake

Meridian Retail Group (3 sites) — \$32,400

3 site splits at \$10.8K, all at Agreement Sent. Signing Wednesday. Biggest live deal on the board.

Quote Sent Taylor Nguyen

Vantage Logistics — \$20,159

CFO call Tuesday 1:30. Cost pain is real and quantified. Taylor's biggest shot — bring the ROI math.

Demo Complete Priya Patel

Atlas Industries (Parent) — \$87,150

The whale. Single biggest opp on the team. Demo done — build the multi-thread and set a dated next step.

Quote Sent Dakota Morrison

Northwind Group (Parent) — \$10,920

Quote is out. Dakota's largest — get the up-front contract and a decision date this week.

TOTAL OPEN PIPELINE

\$322.9K

139 opps

COMMIT CATEGORY

\$14.6K

7 opps

UPSIDE CATEGORY

\$135.0K

29 opps

SANDLER RULE OF THE WEEK • #4

“A decision not to make a decision is a decision.”

We have real money sitting in Quote Sent and Agreement Sent. “Let me think about it” is a no wearing a disguise. Get the prospect to a yes or a no this week — a maybe just costs you the month. **Close the sale or close the file.**

SALES ENABLEMENT

SALES DRILL

Premium Module Top-Objections Drill · Pipeline Reminders

ROLE PLAY • NO NOTES

Premium Module— Top Objections Drill

The 3 Objections You'll Face Most

Source: 479 call-transcript analysis · sorted by frequency

OBJECTION	RECOMMENDED RESPONSE APPROACH
“We already have a marketing tool” (incumbent tool, in-house team)	Agree and layer: "That's great — this doesn't replace it, it supercharges it. Your dedicated Success Manager works with what you already do and adds AI-driven campaigns tied directly to your own data." Then tie to a specific pain already surfaced.
“Not the right time / Let's revisit”	Surface the cost of delay: "What does another 3 months of running this the way you are today cost you?" Use the ROI calculator. If truly not now, set a hard date and own the follow-up.
“Too expensive / price pushback”	Anchor to time + labor cost first: "How many hours does your team spend on this per week? At what cost?" Then show the net-cost math. Discounting is a last resort, not the opener.

ECIR Framework Reminder

01

EMPATHIZE

Use a softening statement to validate the concern without yielding ground. "I totally get that — a lot of teams feel the same way."

02

CLARIFY

Ask a reverse to narrow the broad objection to the specific one. "What exactly about [X] are you concerned about?"

03

ISOLATE

Confirm this is the only obstacle. "Other than [X], is there anything else holding you back from moving forward?"

04

RESPOND

Address the specific, isolated concern with third-party stories, ROI data, or consultative education.

05

CONFIRM

Secure alignment and the next step. "Does that address your concern? Any reason this wouldn't work for you?"

The Drill

15 MIN • NO NOTES • REAL-TIME FEEDBACK

- 1 Manager reads the objection aloud. Rep does **NOT** see the slide.
- 2 Rep handles the objection live — no notes, no pausing.
- 3 Reveal slide. Score each step of ECIR.

3 OBJECTIONS TO ROLE PLAY

1. We already have a marketing tool.
2. Not the right time / Let's revisit.
3. Too expensive.

“We already have a marketing tool.”

(incumbent tool, in-house team, outside agency)

✓ MODEL RESPONSE

Agree and layer: "That's great — this doesn't replace it, it supercharges it. Your dedicated Success Manager works with what you already do and adds AI-driven campaigns tied directly to your own data." Then tie to a specific pain already surfaced.

✗ TRAP — DON'T SAY

"We can actually work alongside your current agency!" — This positions Grow as an additive cost. You'll lose on price every time.

▶ CLOSE WITH

"What would it mean if you could see exactly which of those campaigns actually drove a real customer through your door — tied to a real transaction?" Make attribution the differentiator.

“Not the right time. Let's revisit.”

(seasonal slowdown, budget hesitation, "check back in a few months")

✓ MODEL RESPONSE

Surface the cost of delay: "What does another 3 months of running this the way you are today cost you?" Use the ROI calculator live. If truly not now, set a hard date and own the follow-up.

✗ TRAP — DON'T SAY

"No problem — I'll follow up in a few months." This hands control to a future moment that never comes. You leave with nothing.

▶ CLOSE WITH

"If not now, when exactly? Let's put a hard date on the calendar — I'll send you a hold right now." Send the invite before the call ends.

“That's too expensive. / We're tight on budget.”

(sticker shock before the net-cost math is shown)

✓ MODEL RESPONSE

Anchor to time + labor cost first: "How many hours does your team spend on this per week? At what cost?" Then show the net-cost math live on screen. Discounting is a last resort, not the opener.

✗ TRAP — DON'T SAY

Jumping to discounts at the first sign of pushback. If you fold immediately, you've told them the price was never real.

▶ CLOSE WITH

Show net cost live — subtract the modules they already pay for. "For most teams it's a fraction of that net. What's one hour of your manager's time worth?"

OPERATING STANDARDS

Pipeline Reminders



Pipeline Standards

ONGOING

Pipeline Standards

- ◆ **The 24-Hour Rule** — every new lead moves from 'Open' within 24 hours of assignment.
- ◆ **The 14-Day Cap** — no lead sits more than 14 days without conversion or disqualification.
- ◆ **Daily Cleanup** — statuses accurate by end of every business day.
- ◆ **Cadence Adherence** — contacts enrolled, steps on time.

Call to Action

1. **Cleanup:** update leads >14 days old.
2. **Daily Review:** accurate statuses by EOD.
3. **Report Issues:** flag any lead problems in the team channel.

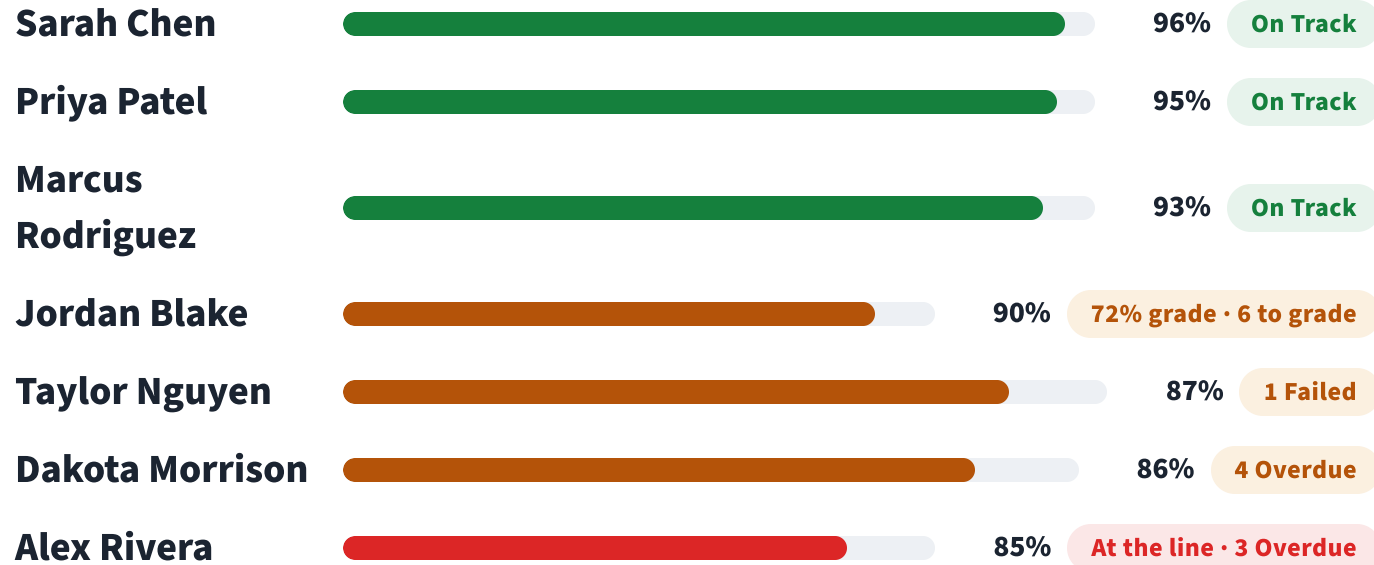
Resources

- ◆ Pipeline report (T30)
- ◆ Buyer-trigger playbook
- ◆ Sequence cadences
- ◆ Team feedback channel



Enablement Check

LMS • 85% COMPLETION THRESHOLD



TEAM COMPLETION

91%

Above the 85% threshold

REPS BELOW 85%

0

but Alex is on the line

This is an MBO qualifier. Below 85% = no bonus. Clear your overdue this week. No excuses.

The Mission

► [WATCH THE VP'S CLIPS IN THE TEAM CHANNEL](#)

Our H2 north star, from Jamie Park (VP) — this is what we're coaching to.

- 1 Get in front of the headroom.** As many mid-to-high value accounts as you can each week. Self-source + referral focus.
- 2 Lead with a 30-second commercial.** Broad value first: how our AI + people-powered tools improve their efficiency and revenue.
- 3 Qualify before you hang up.** When you book the demo, fact-find first: product of interest, current provider, usage frequency, team size.
- 4 Consultative discovery on every call.** Full business understanding through Grow + Team Suite. A diagnosis, not a pitch — and it's how we lift deal size.

THE ONE LINE TO REMEMBER

 **Curiosity over product pitches — all day, every day.**

This Week's Focus

TEAM-WIDE

Let's be honest: we're behind. 30% at 61% of the month. Nobody talks their way out of \$314K — we dial and close our way out.

20 dials/day if you're in the seat. Last week only Marcus cleared it. That's the number-one reason the pipeline is thin.

Close the sent stack. \$149K in Commit + Upside sitting at Quote/Agreement Sent. Get a yes or a no on every one this week.

INDIVIDUAL TARGETS

Jordan Blake	Sign Meridian Wednesday — chase all 3
Taylor Nguyen	Win the Vantage CFO call + get to 20 dials/day
Priya Patel	Advance Atlas — multi-thread + dated next step
Alex Rivera	Keep the run going + clear 3 overdue trainings
Marcus Rodriguez	Turn 100 dials into booked demos
Dakota Morrison	Close Northwind + ramp dials past 15/week



Reminders

TUE 1:30

Taylor — Vantage CFO call. Biggest open deal on the team (\$20.2K). Bring the cost math and the ROI story. Get the decision.

WED

Jordan — Meridian signing. All 3 sites at Agreement Sent, \$32.4K total. Confirm the signature lands this week.

THIS WEEK

Clear overdue trainings. Dakota (4), Alex (3) — enablement is an MBO qualifier. Jordan: 6 items waiting on my grading, I'll clear them.

PERSONAL NOTE

Same ask of you as I have of myself.

Show up, do the reps, compete. That's the whole game — every Monday, and every call in between. Let's make this a week we're proud of.

STARTING

Today

THE STANDARD

20 dials

Reach out anytime — I've got you.

LET'S GO CLOSE.

Apex Sales · April 20, 2026 · 9 selling days left · 20 dials a day