

# REvolution

## A Winning Mindset for Revenue Teams

Featuring Steve Travaglini

Episode 106

**Steve:** When you're pursuing, you know, something that's like truly noteworthy, whether that's the Super Bowl or hitting your quota or any of these things, if you are going to aspire to do something difficult, you have to at some level be super invested in your mindset because I mean, that's everything. It's like skillset is like the old school way of thinking about how do you train somebody. To, to, you know, make President's Club or hit their quota. Mindset's the new school way.

**Mary:** Thanks so much for joining us, Steve, on the podcast. We're thrilled to have you on today, especially on the last day of a quarter, which is really incredible. I'm sure the team is having a great time. I wanted to kinda hop right in and ask you to share a little bit about your background, and you've said before that you've grew up in the School of Hard Knocks. So tell us a little bit about that background and how you've landed as the CRO there at LinkSquares.

**Steve:** Absolutely. Mary, Alex, thank you for having me on...excited to talk with you all. Yeah, so I threw the hard knocks onto my LinkedIn profile because I wanted to encourage, non-traditional candidates to think about LinkSquares as a place where they could start their sales career to make it a bit more approachable.

And I've, I've seen it be really successful. So, yeah.. like many people, I came up, you know, many different jobs before getting into sales. I was a dishwasher at one point. I worked in the service industry as a waiter, line cook, did rock walls for a little bit. I worked a few winters with a moving company, and I've learned just how difficult and strenuous so many jobs out there are.

And, sales is tough too, but if you've worked at a moving company in the height of winter in New England, you know, making cold, cold calls isn't quite as cold, there's a cheesy joke to start.

**Mary:** So I grew up working in my parents' restaurant and was just reflecting on that in the last week or so. I feel like I learned so much about process and workflows and order of operations to get stuff done in some of those experiences that absolutely shapes who I am today and, and what I do.

**Steve:** Yeah, no, absolutely. I couldn't agree more. I remember my dad, he used to tell me like, hey, like these jobs are gonna teach you what it means to work hard.

And I saw, I saw someone, I recently shared something that really caught my attention. It was like you get to choose your hard, right? And, you know, being in the service industry is hard. Being in sales is hard, but you get to choose your hard, right. So for me, I love that the perspective of hard work and other industries apply to an industry like, like sales or, or revenue for that matter, customer success. you know, it can be really fruitful. So choosing, to apply that type of work ethic and that grit towards, something that has such a high pay back.

**Mary:** So speaking of choosing hard, and then you also mentioned cold. I, I noticed in your background you have some BDR experience. Can you talk about choosing hard and what that was like from, from an outbound cold calling perspective?

**Steve:** Yeah. Yeah. So graduating college, I, I knew I wanted to get into sales, but no one would take a look at me. I wanted to get into tech sales in Boston and, none of the recruiters thought I had enough experience cause I didn't have any at all.

But, a family-owned staffing company in central Massachusetts was willing to take a chance. It was kind of their business model to hire the fresh grads and, and, and teach them sales. And that's where I did my, you know, BDR work. And I was really unsure at the beginning. I, I had a really, challenging internship in college that was sales related and there wasn't much training and I wasn't sure if I was gonna like sales, but I kind of just stuck with the plan anyways and, and got into that first gig. And the rest is history from there.

**Alex:** It's interesting. You said you knew you wanted to do sales. Why? And tech sales in Boston?

**Steve:** More so sales than tech sales, was what I knew I wanted to do after college. My dad is one of six. He has five brothers, so, so six boys in the family. God bless my grandparents on that side. But, they're all salespeople. So I grew up, I grew up around a very close Italian family where all of the uncles were in sales, so I was kind of, I was kind of born into it as much as I think you can be, and coming outta school I just figured I would try and find my own path within that type of, you know, broad, sales is such a broad industry.

And tech sales at the time in Boston. Right. You know, lucky to grow up here, right next to a, you know, a massive tech hub...a lot of people are making a lot of money and it seemed like that's where the

excitement was. So I, I, I wanted to go there and it didn't, it didn't pan out that way, at least at the start, but ultimately found a way.

**Mary:** I have a lot of questions and wanna paint a visual picture for myself of what a family dinner would be like of all salespeople. What's the quick version of family dinner?

**Alex:** Not only all salespeople, but all Italians. Travaglinis.

**Steve:** Now, so, so the Trav, the Travaglini family started in East Boston.. so not the North End, but that's where everybody was for a long time. Then went to Burlington, Massachusetts and then now everyone's kind of moved all over Massachusetts and New Hampshire. But yeah, so my dad and his five brothers, that's kind of the start. They all have lots of kids, so, so everyone has at least two kids. The max is four, so, so you have all the cousins there as well.

And then my dad, and his brothers grew up next to their cousins who are basically like an extension of the, aunts and uncles. So you're talking like, you know, holiday parties and dinners and things like that with like, you know, 60 people, 50, 60 people, and, you know, that's, you know, just a normal, I think occurrence. Really loud.

**Alex:** Do you have like sales competitions in the family dinners? Like sell me this pen?

**Steve:** No, nobody really talks about work at all.

**Mary:** It's makes the end of quarter sales floor feel close to home I'm sure with that many people and, and that much fun, which is awesome.

I know you also played college athletics; I think it was football. Alex and I share in some of the athletic background as well, and I was curious, like, how do you, how do you view athletics and being part of a team shaping who you are and how you choose to lead your teams today as well?

**Steve:** Oh yeah. I, I, I think there's so many parallels. Being in athletics is like, you know, something that's like, it's like out of vogue right now, because if you're only hiring for athletes, you're gonna miss out on so many amazing people. But I think to say that like, oh, we don't just hire athletes is kind of like a, a weird, way of thinking because there was so much value there.

Just like there is in, you know, someone who's committed to anything at a high level that requires a lot of discipline and balance and passion for something, whether that's music or, or art or being a football

player, right? I think there's a lot of commonality there that serves as kind of like a baseline for, for identifying whether or not someone has what it takes to pursue something, train, get through difficult times, and ultimately find something that's, you know, bigger than themselves that kind of like tethers them to the task at hand.

So that, you know, and the team, I think there's a lot there in athletics that is super valuable to, you know, accomplish a common goal. So, yeah. I, I think that, when you have to balance academics with athletics or any other, you know, club or extracurricular interest that requires a lot of time, you have to get good at time management and you have to, you know, really think about sacrifices and, you know, what are you willing to kind of give up in order to be the best that you can be in this area. I think all of that, really plays well for someone who's trying to get started in sales.

**Alex:** Oftentimes in sports, Steve, you recall we'd go back and watch the film, right? And how do you watch the film on your team, now that you're the head of sales there, the CRO?

**Steve:** Well, we have Gong, we've had it, since we were a small 10-person company. We have it now, nearly 400 employees. Everybody uses it...will use it to listen in and I'll use it to listen in to a challenging call where things might, may not have gone as well as they could have, or to offer, you know, advice or coaching. But our managers use it all the time. Reps use it all the time to actually, you know, look at their own call. How can they get better? So yeah, game tape, so to speak is like a big piece of, of like a modern sales tech stack. You have to be watching it and thinking about how to get that.

**Mary:** Yeah, I think that player coach mentality is a big part of it. To, to touch back a little bit from an athletics perspective, I think you also dealt with an injury at some point where you had to kind of shift from being frontline player to potentially coaching your own team in some ways, like thinking about listening in on sales calls. Like I, I see a lot of parallels there. Can you talk about how you did that?

**Steve:** Yeah. Not many people know this story. So I was actually signed up in college to do my junior and senior year in the ROTC program for the Army. This ties into my sports injury, I promise. I decided that I was gonna commit to this, to this path, and basically ROTC for those that aren't familiar, it's a way of getting your entire undergrad paid for by the military and you commit four or five years or something like that. And if you're gonna do the accelerated program, which is like just your junior and senior year.

You know, they'll pay for your freshman, sophomore loans, all that good stuff. But it's like pretty competitive because there are only so many slots available and you only, you have to do the two years

versus like all four and all that. So I decided that's what I wanted to do and that I had to compete at, WPI for one of the slots.

So you had to do this two mile run and push up challenge. It's like a physical thing. I went all the way in and I ended up getting one of the slots and then I was gonna spend the summer at Fort Knox which is where they have this accelerated program and all of that. So I was all ready to go.

I had my boots, like the fatigues, like everything was, I was all fitted. And then I was at a friend's backyard party, in New Hampshire playing Frisbee, and I blew out my knee, like colossally blew out my knee, playing backyard Frisbee. And I was not like the peak condition shape I've ever been in.

I was gonna do this thing in the summer down in Fort Knox and I was gonna come back for my fall season to play football. So immediately, ROTC, you know, pulls the scholarship, that opportunity sails. So that's a bummer, and then I'm injured and have to go through reconstructive knee surgery and won't be able to play for the fall season. So that's a fun story people don't know.

**Alex:** We do need to focus on this though, cause you're a football player and you blew out your knee playing Frisbee. I just wanna make sure, in fact, you're a linebacker, right?

**Steve:** Yeah, I know. It was ridiculous. It was like, yeah, it was totally absurd. I was hit from every possible angle by 300 plus pound lineman and never really had like a major serious injury. And then playing Frisbee in my friend's backyard, blew out my knee, like horrifically.

So lose scholarship, lose that opportunity. And I was offered a coaching slot. Essentially you could stay with the team, right? And help us in the booth, during the games and basically assist the defensive coordinator and people like that. And, you know, you come to every practice still if you wanna be a part of the team, and you gotta come to all the weight room sessions, even though you're injured and you do all this stuff.

And at the time it was such a piece of my identity, being a football player and I was so close with everyone on the team that I just couldn't imagine walking away from it. So, I just kind of looked at the situation for what it was and decided that I was gonna become a coach for that year. And then I came back my senior year and got my spot back and, and had a good season with the team, but I did that whole year as a coach. Long answer.

**Alex:** No, it's so funny that a Frisbee like paved your path to where you are today.

**Steve:** Yeah. I wouldn't be in sales if it wasn't for the frisbee throw. I'd be like in the military, you know, hopefully, doing something cool. Life happens.

**Mary:** You mentions also, just hearing that story and thinking about almost like the mindset to work yourself through that and think about each step and just kind of naturally living into that step. I noticed on LinkedIn, Steve Ballmer's USC commencement speech and being hardcore is part of that. Like, what does being hardcore mean to you?

**Steve:** Yeah, so Steve Ballmer is so cool. He's one of my heroes. He's passionate. Some people think he's crazy, but he's really good at what he does. And, I was listening to one of his commencement speeches and it really just struck me, right, like hardcore, like language like that, in today's world, almost seems taboo, right?

Like it's too intense and it's too much. But Steve had a way of illustrating what he means by hardcore, right? Which is being optimistic about what you can achieve in your career, in your life, thinking about, you know, pressing forward through adversity. Thinking about like evolution, which is something that I'm, really into, is like thinking about how you have to continuously learn and continue to get better for every stage of your business or for your company.

You have to develop new skills. And not, it's not always like the things that are super different or, or a totally new thing, but it's like that progression. And, Steve nailed it. And as he was kind of talking about it, I was thinking about my own career and he mentions that people are like sharks, which is also another, like, dangerous thing to say.

And he calls that out and I really like that. He referenced that, you know, with sharks it's like sharks are always moving forward or they die, right? And like hardcore people are like, sharks are like sharks cuz they either move forward, like in their careers and their lives, they keep growing or they die, right?

So I'm always thinking about the type of people that I want at LinkSquares. And I want people that are a little hardcore, people that are super passionate, that wanna go all the way in on something that want to really, push themselves in their career, and in their, you know, in their lives, right?

So, yeah, Steve Ballmer, the links on my LinkedIn page. I leave it there, as an easter egg for, sales folks that wanna write a really custom email or something to me is like, show me that you've done your research. I have a wild YouTube video on my page.

**Mary:** Nice. I appreciate that you said that sometimes it can be a bit taboo. I, I feel like I'm a super motivated person and sometimes I think that the definition around continuing to learn and what evolution looks like. Everyone's view of that can be a little bit different depending on where they are, like where you're currently kind of applying your passions and other things like that.

Can you talk a little bit about the mindset coach Kevin Bailey, that you've added on to your team and maybe how you think about balancing the hardcore approach with everything else that happens in life. Like how do we stay balanced throughout all of it?

**Steve:** Yeah, absolutely. Even the definition of balance is one that's up for discussion I'm sure. Right? Yeah. So Kevin Bailey is amazing. Shout out to Kevin. Mindset coaches are a thing that I think every sales organization, every business are really going to be bought in on over the next 10 years. We're trying to stay ahead of the curve, essentially, sales and many other professions talk about highs and lows, right?

Great sellers know how to balance the highs and the lows. Never get too high, never get too low, right? But nobody teaches it as a skill set, right? It's something that's kind of like learned. It's like, the initiated know how to balance this, you know, over their career.

And, it was during COVID when everything was exponentially challenging and, and stressful, like not just, not just in a professional capacity, but in a personal capacity. We were all going through so much. I was thinking about ways to keep morale high and to help actually tangibly invest in skillset development around how to manage those lows.

Sports teams have been doing this for decades. I thought like, Hey, maybe this could work for us. And I started doing some research on what would be the right fit for us? And, Kevin's a neuroscientist that focuses on teaching the actual like science behind performance, mindset, balance, you know, things that are good for our brains at a neurochemistry level.

Like what's happening when we're stressed, what's happening when we're elated. Everything in between. I felt that science-based foundation would be a really great and approachable way for folks to start to think about their own headspace and mindset and what they can do to foster a more productive working psychological place.

And I personally needed it just as much, maybe more than a lot of other people. So I went all in on learning about it and thinking about ways to improve my own mindset. And I think that it's one of those investments that's hard to tie, you know, real ROI to, but I can say that, you know, this is massively ROI positive.

Anytime you can help prevent burnout or turnover for your best employees who are pushing it super hard, to help them recognize ways to kind of slow it down and kind of shift down and pull it back and you know keep themselves out of those ditches, proactively, through a mindset practice. I think it's so beneficial and, and I'm happy to talk to any sales leaders that might be listening that wanna learn more about it. I think it's truly a worthwhile thing that we should be doing.

**Alex:** Yeah. Love the sports, you know, again, all three of us share that background and it is kind of amazing when you think about the coaches that we've had that have been amazing, that help shape who we are and we get to the business world, a lot of times we don't have that support. And we may fall into it, luckily, but to your point, Steve, most specifically, we don't empower our managers and our supervisors and our leaders with the right skills. So I think it's really interesting. How, how long have you all been doing this now?

**Steve:** Since July or August of 2020...so over two years. And it's spread through the company. Most of the executive team is doing coaching with Kevin and it's spread into different groups and areas.

I mean everyone can benefit from the sports psychologist for business, and I totally agree. Like what is that about business where like, you know, Alabama is gonna invest in sports psychologists, but like, when you go to like the business world, it's like you're on your own. It's like, what is that?

Why is it so cool for the New York Giants, Patriots or some sports team, right, to have sports psychologists, or the Giants or, or whoever, right? Like why is it so cool for professionals, like why is it something that's reserved for professionals? Like, we are professionals, right?

To talk about balance again, to revisit that Mary, it's like, there's nothing balanced about playing for Bill Belichick or for the Patriots, right? Like, you wanna win a Super Bowl, it's gonna be a really, intense experience, but so deeply rewarding in so many ways. Why don't we treat our careers like that?

Why is it that our, you know, if we didn't make it to the top 1% of sports, or acting or music or whatever, but everybody else just kind of lives in this, like, let's, let's prioritize just kinda like going through the motions type of thing, right? Like to me, I have no interest in not, you know, pushing it, you know, in business the same way I would if I was on a professional team's coaching staff. We're trying to be the top one percent of sales organizations. So we're trying to think about the top 1% of organizations that exist at a high-performance level.

**Alex:** When I learned about your, you know, Kevin helping you all with the coaching. I immediately thought of, do you watch Billions? Wendy Rhodes...



**Steve:** So yeah, I've seen Billions.

**Alex:** I'll share with you, I have some personal stories about human resources and HR and you know, that function within a business. And a lot of times people look at HR as, you know, they call themselves business partners, but they're really just doing the blocking and tackling, no pun intended. And what it really should be though, is about that element of really empowerment of, of identifying. And the challenge is, it's hard to do that at scale, by the way, because like Kevin's one person inside your organization, And yeah, so anyway, I, I thought of it being Wendy Rhodes, like, I literally thought of that professional mindset coach.

Yeah. And, and you know what, yeah, I've talked about this on, on a couple other, shows and, you know, it's funny, right? So somebody wrote a comment on LinkedIn that was like, well, is it Wendy Rhodes? Where, where she's trying to keep these people who are like in a really toxic environment and system. Like, like, like finding ways to keep going.

**Steve:** Or like, is it more like a sports psychologist? I don't think it's like that at all, right? Like, that's like HBO, it's tv. It's kind of like funny to reference it and stuff like that. It's about teaching people about what it means, at a brain chemistry level, right? Like, what's going on when you're high, when you're low. What's going on when you're, you know, feeling great or you're feeling bummed, And like, what are the actual tangible things that you can do to help give yourself the best chance at high performance, but also keeping a great, you know, positive, optimistic outlook.

It's, it's truly investing, in an education so that people can be, you know, self-reliant and, you know, more capable of dealing with high pressure situations which naturally occur when you're pursuing something that's truly noteworthy, whether that's the Super Bowl or hitting your quota or any of these things, if you are going to aspire to do something difficult, you have to at some level be super invested in your mindset because I mean, that's everything.

It's like skill is like the old school way of thinking about how do you train somebody to you know make President's Club or hit their quota. Mindset's the new school way. You still have to train on skill, but it's just as important to teach people the skills that they need to keep their mindset positive.

**Alex:** I mean, listen, the three of us play college sports. I mean, you get to a point where everybody has the same physical skill except for a chosen few, and at that point it really becomes about heart and mind. A hundred percent. Like to be the best of the best. I mean, there comes a point where the skills just, everybody's on par. There's parity. And so it really is about, you know, leveling up. And by the way, when I

evoke Wendy Rhodes, I wanna be clear, I, it's funny, I actually didn't think of it a bit as being a toxic environment, what I actually thought the way I think about, but you're not wrong in Ax Capital or whatever it's called now. But, but, but I, but I think more importantly than I think about Wendy Rhodes and her role is, it's so nuanced. Like she knows each personality inside the organization. And knows how to, you know, a lot of times as professionals, we can get wrapped around the axle and she knows how to unwind people and get them back focused on what they need to focus on and excel. So I, I thought of Wendy Rhodes as actually a more of a positive, and not toxic.

**Steve:** Yeah, yeah. I know, I know. But I wanted to address it. Right, because it's an interesting take. Like yeah, we have a mindset coach, like on Billions that helps you get unwrapped from around the axle. Right. But really, like, it's a benevolent exercise for us.

You know, we want people to have this skillset. Not just because we want them to make a ton of money, but because we want them to be happy. Right. And I think that's really important. That's really where it came from. I was looking around the room and I was looking at myself and we were all just kind of, kind of getting our butts kicked.

It was Q3 of 2020. We were at home and it was tough. And it actually started more of a how can we get people to just kind of like hang in there and stay positive and find a way to, you know, get that optimistic fire back that we all had despite this really hard thing that we were facing.

And then all the performance stuff came as a secondary benefit. And we keep doing it for both reasons, not just because of the ROI that we're seeing at a revenue level.

**Mary:** I think there's something really important in that timeframe that you chose to make the decision. From a team perspective, I feel like we've been talking a lot about each individual and their own experience potentially working with Kevin and what they need, because everyone I can imagine, everyone's mindset's different and what we each need from an engagement like that may be unique to where we're all at and what we're experiencing in our lives.

I would imagine though, it's kind of interesting thinking about it from kind of a player to a coach. I would imagine the emotional EQ level of the entire team has potentially gone up. Like do you see more people helping coach and pull others along, like where sales becomes, I'm gonna potentially stereotype a little bit here, like, I think sometimes you think about sharks going it alone. Like have you found that your team is like better bonded and more connected from going through this experience together?

**Steve:** Yeah, I think so. I think it's something that, you know as you work on yourself, you're better for everybody else, right? So as managers are working on their own mindset and they're thinking about the things that are working for them, kinda self-diagnosing, like how to improve...naturally, the team, you know, benefits from that. They get a happier, more balanced, optimistic leader, and naturally, like those are the types of people that you wanna work with. It really is a common vernacular for the frontline sellers, the managers, executives, or everyone understands and has this baseline education surrounding you know mindset that we can all kinda lean on and reference.

**Mary:** So how does that culture scale, like, how do you think about that? You've mentioned before that you all have grown a lot, I think from 10 to 350, 400 in the last four years. Like how do, how do you scale that high performance culture?

**Steve:** Yeah, so mindset training that's on Kevin to figure out how to scale it. He's come up with some cool like web-based training courses and things like that which have helped. But the culture, I think, I had a sales mentor, Chris, who talked about the first like seven foundational floors of a building. I'm not sure if he made it up or got it from somewhere else, but it's always stuck with me.

He talks about how you're in the city and you see like a skyscraper's about to go up. It feels like they pound the ground and they work on that foundation for what feels like, you know, forever. Like, you know, two years they're working on that foundation and all of a sudden the whole building just, it just shoots straight up and all of a sudden it's like they're putting the windows on and like it's basically done.

I think about the early days at LinkSquares as that foundation building. The first hires are so critical. Those processes, those rituals, the accountability, the mindset of the team at that point, sets the table for everyone else that will then come. So it's a train the trainer type of mentality.

We do a ton of internal promotion at LinkSquares..about 80 to 90% of the leaders at LinkSquares that are people managers started in individual contributor seats. So you work with 'em hands on. You make sure that they understand why we're doing it, the way that we're doing it, and how to do it. And you know, you have to coach and invest the time so that they can step up, which is really important to scalability of anything.

Oftentimes the hardest thing is to let go and step back so other people can grab, like other people can grab on and step up. And once you teach them, you then have to like teach them how to teach a little bit, but you have to let them step up and then train other people and then make sure that they understand that like their job now is to like let those people step up and that's how everyone can kind of grow

together. So I think it's really about creating opportunities for people, making sure that people understand like a piece of this whole thing is to like give other people awesome responsibilities and let them kind of run with it. I think all of that is critical to scaling the high-performance culture.

**Alex:** So Steve, you've talked a lot, your appetite for and focus on evolution. So, and we've, I mean that's kind of the essence of what we've been talking about. So, talk to us about the title of CRO today, like what is it today? What does it mean for you, and where do you see it evolving?

**Steve:** Yeah, so the title today is Chief Revenue Officer, and at every business it's different...which is kind of a cool thing about the title, I suppose. At LinkSquares, it's sales, customer success, revenue operations, pre-sales engineering, which we call the Technical Solutions Attorneys, which is really neat. Shout to the TSAs, they're our secret sauce at LinkSquares. But it's all those folks that help make the sales happen, help onboard the customers.

It's the implementation team, it's support, it's onboarding, it's the CS functions. It's not marketing. So a lot of the CRO roles out there include marketing. We don't, and I actually think it's good. I think that you should have a specialist that has deep, deep marketing roots, and a CRO that has deep, deep sales and success roots.

So that you're having two super high performers that are masters of their respective crafts that get along really well and plan together and are on the same team. I think that's like the thing that so many people have had a hard time doing is like getting revenue, go to market, CS sales and marketing all aligned.

So by having one person like oversee it all, that's kind of like the easy button on that alignment. But I think that you lose out on having a deeper expertise, from like top level executives and either respective areas. So where it goes, I don't think anybody knows. I don't really think it matters.

I think it's gonna be different for every company, but I think that the principle is that sales and marketing need to be on the same team, revenue, regardless of what is consisted of in that world. You know, they need to be on the same team. I mean, you also see like chief customer officers, right? Which are different from, you know, at some organizations like Chief Sales Officers, Chief Revenue Officers, really just titles, for us at LinkSquares.

I don't know if that's a good answer or a bad answer. I just think that at the end of the day, You need to, you know, feel the strategy that's gonna bring the business forward. And if you can't do that because of misalignment and communication, you either have the wrong leaders, you gotta consolidate it to one leader. But if you have leaders that it's working, you know, it's, it's best.

**Alex:** I'm curious, Steve, when you and I talked to you previously, and I've noticed that there's a trend now for customer success being part of the sales organization. How do you all think about that customer experience? Yeah. And how does it inform your sales team and your sales operations?

**Steve:** Yeah, I think, I think it's critically important. And this is another one of those, right? Where if it wasn't under one roof, could it be aligned? Absolutely, at our company, it is under one roof, so it's naturally aligned, right? My top-level goals are equally split between new business, new logo acquisition, revenue targets, all that good stuff. And post-sale, like, you know, what is our net retention? How many customers are renewing, are they buying more? Are they seeing value? How many of them are being onboarded in what timeframe? What's our net promoter score? And, and all of these important things.

Are the customers talking about us, in a favorable way on sites like G2 and things like that, which kinda like ties into market. Yeah, so for us, it's been really beneficial. I'll just give you one example. So coming into this year, we had to make some decisions about, you know, who owns upsell? Is it sales? Is it customer success?

And what's that mean? If we're trying to drive high net retention, if sales doesn't own it, are they just going to sell everything under the sun? You know, and there'd be nothing to upsell. And, you know we have the ability to craft the comp plans in a way that kind of negates that. So if there's a discussion like, is sales overselling or are customers over buying?

What's going on there? Like, how do we address it? If we take out the pressure of them needing to like sell everything on the first sale, and we say that you'll get credit for all of the upsell for a year, and CS will get credit for it too. Everybody makes money. Then what is sales gonna do, sales is oftentimes going to take the path of least resistance and you know, if that means that a customer's gonna buy small and grow big later, those would be the deals that would be getting signed.

Because you know, you're gonna see naturally those deals grow and they're not gonna have to do as much up front, right? Or, you're gonna see the sales team selling deals that might be larger, which is what happened, right? But not because they're trying to capture all the upsell. It's because that's what the customers are looking for, right?

So, I think that having like a neutral party above sales and CS kind of like tying it all together is beneficial, but you better have subject matter experts, that are absolutely the best at CS and implementation and support and having their peers on the sales, new business, enterprise, all that revenue operations as well, like all kind of in, in that general team umbrella. So everyone's on the same page, but it's complex, right?

Like all of this stuff it's, it's not one size fits all for any organization and changes as you grow, yeah. Every stage is massively different.

**Mary:** I'm curious too, you mentioned kind of the partnership with marketing and I feel like knowing that you get along is a huge part of it. And hitting the easy button does seem like a fast way to alignment. When you think about that partnership and metrics and KPIs around that, like do you all share in an overarching goal together and then think about how each one of the teams align? Like how do y'all talk about that?

**Steve:** Yeah, super simplistic. Revenue, like top line customer goals, like, like ARR, growth, net retention. These are shared metrics between sales, customer success, marketing, everyone, right? I think, some companies kind of over-engineer the attribution and, and it kind of works against the team all being on one, all one page.

I think we all celebrate the top-level company goals as a team, and it's nothing more than that. This is pretty like, simple, you know, like we're all trying to, you know, drive the best leads, convert the leads, have the best events, convert the leads at the events. To what end? To our customers being super happy, buying more products. To our new business teams, getting great deals, you know, making things a little bit easier, with, you know, lead surfacing that might be a little bit further down the funnel.

But yeah, like marketing has done a crazy great, great job at LinkSquares with driving customer events, which is, it's not just all about like MQL and all this type of stuff. It's about like, let's get our customers together, make sure that they're super happy and let's provide value to them in some kind of way. Like let's help customer success too and not just, not just sales.

**Alex:** Yeah. I, I'll say Steve, I'm super happy to hear you talk about simplicity, cuz I think that's a very hard thing to hold onto as an organization grows. You know, Mary for example came from a huge company, you know, like Red Hat and I know there's a lot of complexity inside an organization like Red Hat.

I've worked in both small and large companies and I've worked in growth size companies like your size. And as you grow, and I could speak from experience, it is very hard to hold onto that simplicity. You can tend to over-engineer things. and a lot of it, I will say it is, you know, a lot of it is from leadership, from investors that trickles down. So kudos to you and the team from maintaining that simplicity. It's not easy.

**Steve:** Yeah, well, I think it's a decision, right? So, complexity is necessary. The level of depth on what we're capturing and what we report on, and what we have the ability to run analysis on to see, how we're

doing, like where, what, what we're doing that's working, what's not working, all of that, that's par for the course.

You gotta do all that stuff. The level of complexity that we have at an operating like data posture level as a business is wildly deep. But how we think about what our goals are, right? It's simple. Like, let's hit our big top level company goals together, right? Let's focus on that.

Let's not focus on all of the micro like minutia. And think that, you know, obviously talking about alignment with marketing, it's like, it's all about trust, it's all about, you know, being a team and respecting each other. I know Juliette, our CMO like respects what I do.

She knows that like, I've got it. And, she's always there to help when I need it. And she's totally, incredibly brilliant, one of the smartest people that I've ever worked with. So I love bouncing ideas off of her, but also like she knows that I respect the heck out of her, trust her deeply, and I know that she's got it right.

So, so there isn't like that, like who's, and we win a lot. So, you know, people aren't looking around the room for who's like fault it is that we're not winning. We're focused on the next game and winning that game together versus like trying to justify.

**Alex:** Does she trust your music selection on a Friday for the sales floor?

**Steve:** Of course, of course, of course. Yeah, like she doesn't worry about the music, just like, you know, I don't worry about anything that's going on her side of the house. If we're playing Nickelback on the last day of the quarter, which doesn't seem like it makes a lot of sense because it doesn't really like, you know, most people are like what's going on, and it's really weird. But if that's what the team needs, that's what the team needs.

**Mary:** Love it. And so one more question for you. I'm curious. I think it says a lot about the dreams we have at night sometimes. Do you ever dream about revenue or like that deal that got away? Like, or are you sleeping peacefully thanks to Kevin?

**Steve:** Yeah, I normally sleep peacefully. I think that it's more like the revenue nightmare would like creep into my mind where, you know, I, I care so much about my people and I know that it's so difficult out there. But I definitely have had like a, you know, this person decided to leave nightmare.

And like I wake up and it's like horrific. It's like horrific. It's like one of those nightmares where you wake up and you're like, Oh my gosh, I'm so glad that I was just dreaming. And I don't know what that is or where

that comes from, but I do know that when that happens, and it's happened a couple of times, it makes me appreciate so much that that person who's so valuable on our team is there.

Like the next morning it's, I go give 'em like a hug. I'm like, Hey, just like, like not in a weird way. It's just like, oh my gosh. Like I don't know if I've told you lately, like how amazing you are and like how critical you are to this whole thing working. But like, let's get lunch or something. Right? Uh so I try and make sure that people feel the love and there's dreams, like I think are like my subconscious way.

**Alex:** Your team is dying to know who you dreamed about. So that'll be...

**Mary:** The, the new thread...

**Steve:** I think it was actually, I. I'll throw it out there. I think it was like Rob Dorgan or something earlier this year. It's one of our sales managers. Been with us since like the very beginning and that was a tough one. So I, I love Rob Dorgan. Shout out to Rob. He's one of the best of the best. Future CRO, VP of sales. No question.

**Alex:** That is one of your missions is really empowering people and getting out of the way.

**Steve:** Yeah. Yeah. Because that's what I wanted, right? And I find that like super talented, capable, hardcore people that really wanna push the limits of their career and, and like the limits of their own evolution.

Like how much can they learn? How far can they go? How much can they grow? I think naturally if you're gonna attract those people, you better put your money where your mouth is because those people have a big expectation for running fast and for moving up quickly and taking on more responsibility.

And I authentically mean it with every fiber of my being. That is, you know, one of my core missions, with my career, is to throw the rope back over. And afford these opportunities to other people the way that I was given them. Right? Like there is nothing self-made about Steve, like in a, in a vacuum.

It took leadership being willing and excited and eager to give me opportunities maybe before I was ready for them. And I'm, for that reason, I'm forever grateful. But now, having seen the benefit of that, I haven't been, have been sold that story myself and then actually have, have seen it play out when other people were kind of skeptical as to whether or not our sales leaders meant what they were saying.



It's like, no, like that has to be the whole thing, the whole mission, because then people play to a totally different level, when they're feeling actually inspired that this is gonna lead to the next stage of their career. If it's not, you're failing. Even if you're hitting your revenue goals, if you're not promoting people, if you're not helping people get to the next level, if you're not helping to develop a skill set that's gonna transcend your company or your brand, you're failing them as a leader.

That's what I believe. My goal is to hit the revenue goals. My goal is to build predictable, revenue models. My goal is to lead this company well past a hundred million dollars, push it to IPO, all of those things. I'm super focused on them, but that's like the business side of it. Like one of my why's outside of my personal whys and my family and everything like that, is creating a legacy of amazing sales leaders who are programmed the right way to think about how they should be serving their people and helping them get ahead.

And if we can create that type of butterfly effect, I think that, you know, the impacts could be huge for many, many years to come in a really positive way. Right? Not just that like, hey, let's help people get promoted, become VPs of Sales, but like let's teach them that. Like you should be caring about what your people think and, and like their mindset and you should be thinking about how you're gonna get people promoted and get them ahead.

If we can create sales leaders that think that way, they'll create more sales leaders that will think that way and then, when we've hung them up, so to speak, we'll be able to look back and say, hey, like we did our part at bringing sales forward.

**Mary:** It really is about that legacy, that team, and that huge butterfly effect, to your point all across the world. That's amazing. Thank you so much for being on. It has been an incredible conversation and I appreciate all that you've shared about your experience and how you're also leading the team there. Thanks for coming.