Next Fiscal Year Starts Now:
The Eight-Step Sales Readiness Framework for CROs

FTI CONSULTING™

Executive Summary

Growth-focused organizations are rethinking how their sales functions operate. In an environment where market shifts are rapid and customer expectations are evolving, sales readiness is not just a commercial priority but has evolved to become an enterprise priority. This paper outlines eight critical steps to build a modern, value-driven sales planning process that connects go-to-market strategy with financial outcomes. From segmentation and forecasting to governance and enablement, each step represents an opportunity to improve profitability, scale smarter and unlock enterprise value.

Fig-1 : Eight-Step Sales Readiness Framework Summary

	Step	Objective	Key Outcomes
1	Customer Base Cleansing and Benchmarking	Create a single, accurate customer data source and benchmark against market standards to enable sound, objective planning	Built a data-driven commercial strategy grounded in clearly defined TAM and SAM, an accurate customer fact base, meaningful benchmarking, and full integration of data into core systems to enable ongoing planning
2	Customer Segmentation	Categorize customers by value and behavior to focus sales strategies and resources where they yield the highest impact	Mapped account demographics and behaviors, defined strategic segments, quantified growth opportunities, and linked segments directly to prioritized sales actions
3	Sales Coverage and Talent Assessment	Align sales talent and resources to priority segments and opportunities to maximize market coverage and performance	Optimized the sales coverage model based on segment potential and workload complexity; developed a competency framework with role-specific evaluations for each sales position
4	Sales Incentive Design	Align incentive plans and KPIs to company strategy, ensuring plans are motivating, measurable, and easily understood	Defined incentive benchmarks and KPIs using internal and external data; aligned compensation plans with company goals and best practices, and delivered accessible commission calculators for leaders and reps
5	Demand Forecast and Strategic Planning	Use data-driven forecasting and strategic planning to set ambitious, feasible sales targets with cross-functional alignment	Clearly defined and allocated "stretch" growth opportunities by segment, with cross-functional validation of forecasting against budget and operational capacity
6	Quota Setting	Assign clear, fair quotas that reflect company goals and drive accountability and performance at the individual level	Aligned sales quotas with company goals and distributed them by role, territory, and product; implemented a quota attainment model and real-time monitoring tools to track performance
7	Sales Governance and Execution	Embed effective governance with standardized reporting and meeting cadences to drive ongoing accountability and execution	Refreshed reporting dashboards to consistently track sales volume, attainment, and forecasts; introduced standardized templates and tools aligned with the sales readiness framework
8	Sales Kick-Off and Communication Plans	Energize and align the sales organization around key goals and changes through a structured kick-off and continuous communication	Delivered enablement materials to drive adoption of new tools and executed a clear, ongoing communication plan for reinforcement and sustained support

Step 1: Customer Base Cleansing and Benchmarking

Sales readiness begins with commercial clarity — grounding decisions in objective, harmonized data rather than legacy assumptions or fragmented ownership. Cleansing and benchmarking your customer base consolidates fragmented information, eliminates duplicates and aligns fields like sales ownership, segment and revenue. It creates parent-child distinctions to understand true account potential. Crucially, true benchmarking isn't just about looking inward. Benchmarking across internal historicals and external comparators, including Total Addressable Market (TAM)/Serviceable Addressable Market (SAM), creates a credible baseline for growth strategy. In addition, it allows for the analysis of wallet's share to start to identify whitespace in the market. By grounding your planning process in both internal data and external market baselines, you ensure your strategy is not only informed, but also ambitious, actionable and achievable. Without this baseline, strategic planning is based on too many assumptions and guesswork.

Why This Matters

A unified customer fact base is the foundation of commercial transformation. Without it, planning is guesswork. With it, CROs can confidently prioritize high-value segments, deploy resources with precision and accelerate growth from the ground up.

Key Checkpoints

— Do you have a clear understanding of your Total Addressable Market and Serviceable Addressable Market?

— Can you generate a consolidated and accurate customer fact base to support all downstream planning?

— Are internal and external benchmarks clearly applied to assess customer performance and health?

— Is your customer data fully integrated into core systems (CRM, BI tools) for ongoing use?

Step 2: Customer Segmentation

Not all customers drive the same value, so your sales strategy shouldn't treat them equally. Effective segmentation uncovers white space, isolates high-potential clusters and aligns sales efforts to the accounts that truly move the needle. By layering in factors like buying behavior, total revenue or even elements of the customer's profile (i.e., # of employees, assets under management, etc.) that are widely reported across the industry, organizations can unlock differentiated sales motions across customer tiers and verticals, while also gaining a clearer picture of where to penetrate. Leveraging advanced AI tools and customer research tools, organizations can precisely quantify the "Size of the Prize" and develop dynamic segmentation frameworks by region, industry, sales team or product mix, closely aligning with actual buying behaviors.

Why This Matters

Strategic segmentation powers growth, allowing you to create customized sales motions that cater directly to the needs of the cohort. It ensures sales teams are properly supported in their pursuit of the right opportunities, helping drive better margins, faster deal cycles and deeper account penetration. Selecting the right segmentation approach aligns with current offerings and future growth, enabling leaders to target up-sell, cross-sell, and win-back opportunities that support company strategy.

Fig-2 : Mature Product Portfolio Approach

Customer Booking Potential (growth potential "whitespace")

High Growth Potential — Enterprise segment
Medium Growth Potential — Mid market segment
Low Growth Potential — SMB segment

Low value   Medium value   High value

Current Spend
(client size and strategic importance)
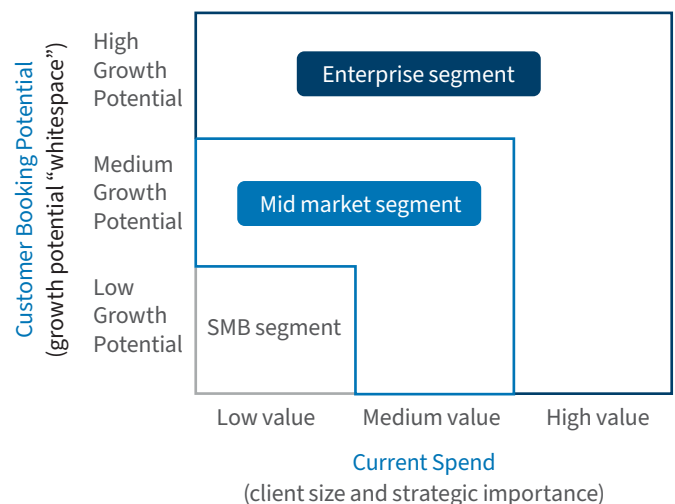
Fig-3 : Emerging Product Portfolio Approach

Current Spend
(client size and strategic importance)

MAINTAIN	EXPAND	LAND
Focus on maintaining and driving business in existing portfolio with as few resources as possible	Focused efforts on expanding business with existing accounts to new portfolio offerings	Activities focused on landing specific new logos

OPTIMIZE
Potentially inside sales or indirect channel

Customer Booking Potential
(growth potential "whitespace")

Key Checkpoints

— Are key account demographics and behavioral data enriched to fullest potential?

— Do you have defined segmentation archetypes aligned with our strategic objectives?

— Can you quantify revenue opportunities (up-sell, cross-sell, win-back) within each segment?

— Is segmentation tied to actionable sales motions and prioritization frameworks?

Step 3: Sales Coverage and Talent Assessments

Coverage modeling translates strategy into structure. It is key to conduct comprehensive analysis of the sales coverage model across regions, segments and channels, followed by rigorous talent assessments to ensure optimal role alignment and maximize market impact. Sales motions are reviewed for efficiency and headcount is reassigned based on revenue acceleration potential. Reps must be evaluated on capability, fit and role clarity to enhance coverage efficiency.

Why This Matters

A misaligned sales model bleeds productivity. The right coverage model increases yield per seller, reduces cycle time and creates the structural agility needed to scale into new markets. This is where revenue ambition meets execution discipline, ultimately, aligning structure, talent and growth targets.

Key Checkpoints

— Is your current sales coverage model optimized for segment potential and workload complexity?

— Do you have a competency framework for each sales role in your coverage model that you evaluate your salespeople against?

— Do you have programs in place to upskill your salespeople based on the team's strengths, weaknesses and gaps?

— Have account assignments and roles been updated based on talent fit and strategic priorities?
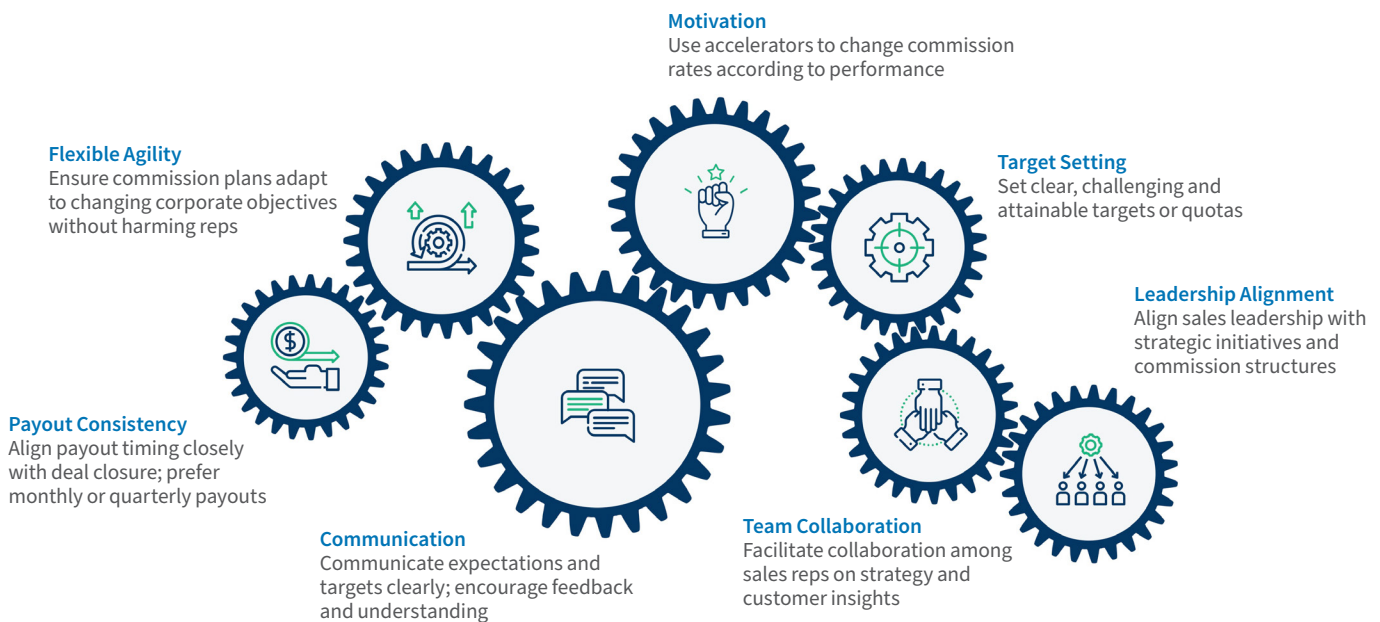
Step 4: Sales Incentive Design

Designing incentives is not just about motivating teams but about reinforcing strategy. Compensation is your most powerful performance lever. Incentive structures should drive the behaviors that matter most: profitable growth, cross-sell expansion and long-term account value. The best plans strike a balance between simplicity, fairness and strategic focus. Alignment of incentive structures with overall company goals enables dynamic and creative approaches to driving desired behaviors. This rewards not only what gets sold, but how it gets sold.

Why This Matters

Incentives shape how your teams show up every day. Thoughtfully crafted plans can ignite high performance, align effort to enterprise value and ensure sales motions are both disciplined and scalable. When incentives drive the right behaviors, growth follows.

Fig-4 : Key Drivers of Effective Sales Incentive Design

Motivation
Use accelerators to change commission rates according to performance

Flexible Agility
Ensure commission plans adapt to changing corporate objectives without harming reps

Target Setting
Set clear, challenging and attainable targets or quotas

Leadership Alignment
Align sales leadership with strategic initiatives and commission structures

Payout Consistency
Align payout timing closely with deal closure; prefer monthly or quarterly payouts

Communication
Communicate expectations and targets clearly; encourage feedback and understanding

Team Collaboration
Facilitate collaboration among sales reps on strategy and customer insights

Key Checkpoints

— Are your incentive benchmarks and KPIs defined using internal and external data with realistic targets?

— Is the plan aligned with company goals and does it incorporate industry best practices?

— Are tools like commission calculators accessible and adopted by both leaders and reps?

— Is the sales incentive plan easy for reps to understand to the point where they can easily calculate their commission earnings?

Step 5: Demand Forecasting & Strategic Planning

Accurate demand forecasting is the backbone of successful sales planning, as it enables organizations to anticipate demand, set informed targets and allocate resources strategically. When paired with integrated planning, these forecasts translate into actionable goals across your segments and teams. A critical part of the process is monthly tracking of actuals against forecast, which helps teams quickly adapt strategies and stay aligned with market conditions. This ongoing review turns forecasting into a dynamic management tool, ensuring that sales planning is aligned with strategy to ultimately sustain sales growth.

Why This Matters

Without detailed demand forecasting and ongoing performance tracking, sales plans risk falling out of sync with reality. Monitoring actual performance vs. forecast each month provides early visibility into gaps or upside opportunities, enabling faster, smarter adjustments across sales motions.

Fig-5 : Integrated Demand Forecasting and Strategic Planning Process

Baseline Forecast (Historical Seasonality and Trend Adjusted)	Seasonality-trend indexed monthly forecast based on past volume
Market Adjustment	Outside-in adjustment to baseline forecast
Customer Input (Sales Rep Template)	Gather and analyze customer data to inform next year's sales forecast
Sales Leadership Validation	Meet with Sales Leadership to adjust where needed
Operational Feasibility Calibration	Confirm feasibility of meeting demand forecast
Top-Down Reconciliation	Address additional opportunities and reconcile demand forecast into next year's sales planning

Additional opportunity identification to drive alignment to top-down goal

Key Checkpoints

— Have "stretch" growth opportunities been clearly defined and allocated to appropriate sales segments?

— Have cross-functional teams validated the forecast against budget and operational capacity?

— Are bottom-up forecasts reconciled with board targets and supported by defined gap-closing strategies?

Step 6: Quota Setting

Quotas are the operational translation of your growth strategy. Effective quota design balances realism and ambition, factoring in market potential, rep capacity and white space opportunity to drive accountability and momentum. Ongoing monitoring ensures quotas are both ambitious and achievable, with most representatives ideally attaining 80–100% of target.

Why This Matters

Bad quotas create chaos. They misalign effort, distort forecasts and drive talent churn. Strategic quota setting focuses your team, protects margin and builds the confidence needed to scale, internally and in the market, while effective quota setting balances ambition with achievability, directly driving rep performance and organizational momentum while driving the business forward.

Key Checkpoints

— Are sales quotas aligned with company goals and broken into individual targets based on role, territory and product?

— Can you produce a quota attainment model showing performance distribution across the team?

— Do you have dynamic scenario calculators for team to simulate earnings/potential?

Step 7: Sales Governance and Execution

Sales strategy only works if it's executed with precision. This means implementing structured meeting cadences and standardized reporting mechanisms to drive accountability, ensure visibility and keep sales performance on track throughout the fiscal year. A strong governance framework provides the necessary rhythm for sales leaders to monitor progress, coach effectively and intervene early when adjustments are needed.
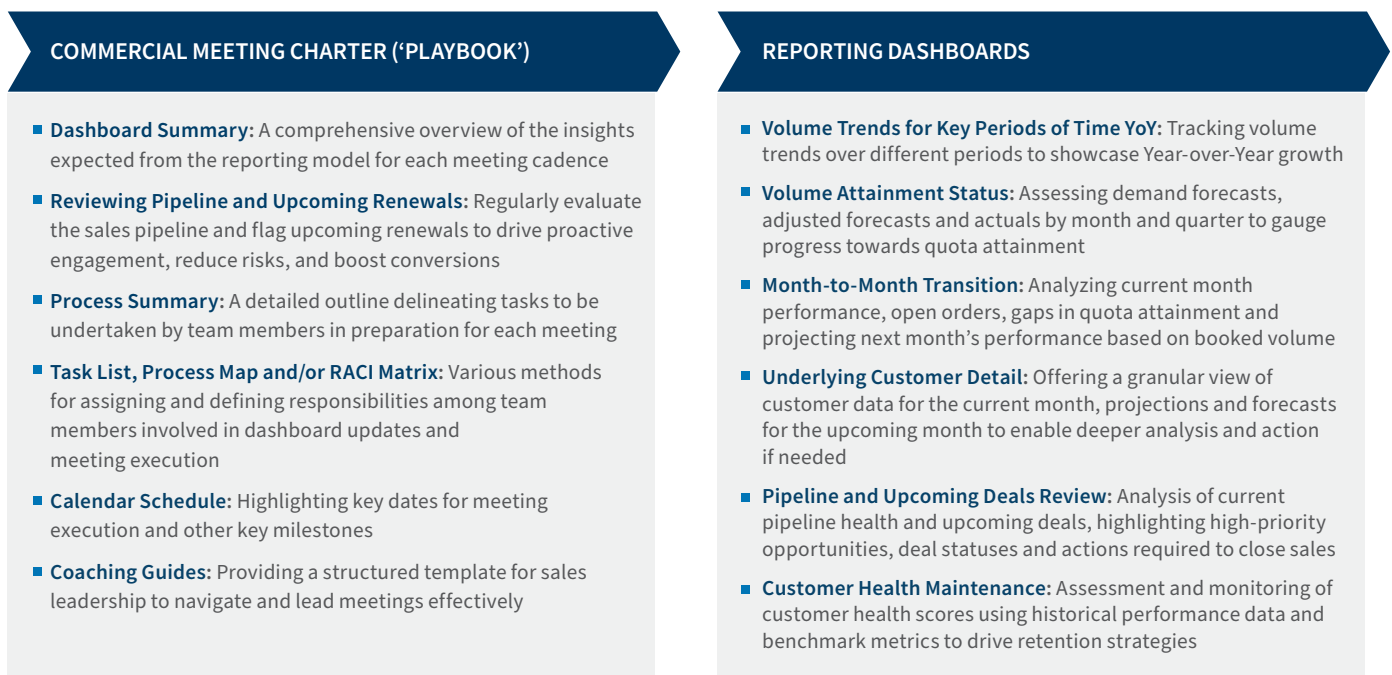
Why This Matters

Without governance, execution becomes inconsistent and unpredictable. CROs who institutionalize sales governance enable faster decisions, consistent execution and alignment with enterprise goals, ensuring strategy is measured, refined and delivers tangible value.

Key Checkpoints

— Are reporting dashboards in place and consistently refreshed to track metrics like volume, attainment and forecasts?

— Are templates and tools standardized, accessible and aligned with your sales readiness framework?

— Are sales managers equipped with clear cadences and uniform coaching guides to run meetings that drive accountability?

Fig-6 : Commercial Sales Meeting Best Practices

COMMERCIAL MEETING CHARTER ('PLAYBOOK')

- **Dashboard Summary:** A comprehensive overview of the insights expected from the reporting model for each meeting cadence

- **Reviewing Pipeline and Upcoming Renewals:** Regularly evaluate the sales pipeline and flag upcoming renewals to drive proactive engagement, reduce risks, and boost conversions

- **Process Summary:** A detailed outline delineating tasks to be undertaken by team members in preparation for each meeting

- **Task List, Process Map and/or RACI Matrix:** Various methods for assigning and defining responsibilities among team members involved in dashboard updates and meeting execution

- **Calendar Schedule:** Highlighting key dates for meeting execution and other key milestones

- **Coaching Guides:** Providing a structured template for sales leadership to navigate and lead meetings effectively

REPORTING DASHBOARDS

- **Volume Trends for Key Periods of Time YoY:** Tracking volume trends over different periods to showcase Year-over-Year growth

- **Volume Attainment Status:** Assessing demand forecasts, adjusted forecasts and actuals by month and quarter to gauge progress towards quota attainment

- **Month-to-Month Transition:** Analyzing current month performance, open orders, gaps in quota attainment and projecting next month's performance based on booked volume

- **Underlying Customer Detail:** Offering a granular view of customer data for the current month, projections and forecasts for the upcoming month to enable deeper analysis and action if needed

- **Pipeline and Upcoming Deals Review:** Analysis of current pipeline health and upcoming deals, highlighting high-priority opportunities, deal statuses and actions required to close sales

- **Customer Health Maintenance:** Assessment and monitoring of customer health scores using historical performance data and benchmark metrics to drive retention strategies

Step 8: Sales Kick-off and Communication Plans

A sales kick-off is a leadership and team-building moment that allows everyone to share successes, ideas and solutions around gaps. It strategically aligns and energizes the team around key priorities for the new fiscal year. Executive communications and targeted manager engagement ensure clarity on goals, tools and expectations, while supplemental resources and formal sign-offs drive accountability and unified execution.

Why This Matters

A sales kick-off is a catalyst that drives alignment, momentum and execution across teams. For CROs, it is the key lever to unify teams, clarify expectations and accelerate revenue by setting the tone, aligning priorities and energizing the sales force for high performance from day one.

Key Checkpoints

— Is the sales kick-off structured to align the team with the company's vision and priorities?

— Are enablement materials prepared to support adoption of tools, incentives or structural changes?

— Is there a clear, ongoing communication plan for reinforcement and support?

Final Thoughts

Sales readiness evolved from just a commercial priority to a key strategic lever for enterprise value. Organizations that align data, talent, incentives and execution will not only grow faster, but more profitably. By treating sales readiness as an ongoing capability, leaders can unlock performance, drive better financial outcomes and turn their commercial function into a catalyst for transformation. Now is the time for leaders to elevate sales readiness as a lever for enterprise performance and sustained competitive advantage.

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