MarketStar

Optimizing Your Sales Pipeline Velocity For Top Performance With Molly McKinstry

Introduction

[0:17] Joy Dumandan: Hi, everyone, and welcome to the CXO Masterclass: Future-Proof Your Sales Organization – Preparing for Change and Uncertainty.

In this episode, we're focusing on sales pipeline velocity and how to optimize it for top performance.

Joining us today is Molly McKinstry, Head of Sales at Calendly.

[0:35] Joy: Welcome, Molly.

[0:36] Molly McKinstry: Hi, Joy. It's so nice to see you.

Thank you for having me. I'm really excited about our conversation today.

Section 1: Calendly's Evolution and the Changing Sales Landscape

[0:42] Joy: Let's start by talking a little about Calendly. For those who may not be familiar with it, can you tell us about the company?

[0:47] Molly: Absolutely.

Calendly is a scheduling automation platform, but we're certainly much more than that.

Organizations use Calendly across sales, customer success, marketing, recruiting, and virtually every function to streamline and automate scheduling.

[1:13] It's not just about scheduling a meeting—it's about managing the entire meeting lifecycle.

Anyone who hosts external meetings knows how complicated it can be to coordinate calendars, align availability, and schedule multiple attendees across different organizations.

[1:38] Calendly automates that complexity behind the scenes, saving time on scheduling logistics so people can focus on having more productive conversations instead.

[1:52] Joy: How did that change during the pandemic? Did you see demand for Calendly increase as organizations looked for online collaboration tools?

[2:03] Molly: Absolutely. So much changed as a result of the pandemic, and the business environment was no exception.

From a sales perspective, we've seen a significant shift in how organizations sell in the post-pandemic world.

[2:23] One of the biggest changes is that asynchronous collaboration tools have become essential.

Before the pandemic, teams often worked side by side and met prospective buyers face to face. Today, with remote and hybrid work becoming the norm, that's much less common.

[2:50] While every industry is different, the need for asynchronous collaboration, digital tools, and technology investments has accelerated dramatically—and I don't see that slowing down anytime soon.

[3:08] We've also seen that demonstrating business ROI is more important than ever.

That's driven not only by the pandemic but also by today's broader macroeconomic environment. Organizations are under increased pressure to ensure every investment delivers measurable business outcomes and improves the bottom line.

[3:40] That focus on ROI existed before the pandemic, but today's environment has intensified it.

If you're selling today, your ROI story needs to be crystal clear, and the business impact you're delivering has to be immediately evident.

Section 2: Building an Effective Sales Pipeline Management Process

[4:03] Joy: When it comes to sales pipeline management, what are some of its key characteristics?

[4:05] Molly: I love this topic. Maybe that just means I chose the right profession.

There's a well-known Harvard Business Review study that found an 18% difference in revenue growth between companies with a defined, formal sales process and those without one. That doesn't surprise me at all.

[4:32] I'm a strong believer that every sales organization needs a clearly defined sales process with specific stages throughout the buyer journey.

Having that structure is critical because it allows you to scale, evaluate, and consistently move opportunities through the sales pipeline.

[4:55] People often say sales is both an art and a science. While that's true, from a pipeline management perspective, it's absolutely a science.

I'm a huge advocate for using clear, consistent language across the sales organization and defining every stage of the sales process.

[5:20] People also say sales is a numbers game, and while value messaging and selling skills certainly matter, pipeline management ultimately comes down to how effectively you manage the process and move opportunities through the forecast.

[7:37] As organizations grow, consistency becomes even more important.

If you're working in an organization with multiple sellers—whether that's dozens or hundreds of reps—you need a standardized system that everyone follows consistently.

[7:53] If you asked me which part of the sales process is most important for pipeline health and revenue predictability, I'd say it's the top of the funnel: qualification and discovery.

Getting that stage right is absolutely critical because you first need to determine whether you've truly qualified the opportunities in your pipeline.

[8:22] That means asking questions like:

- Are the right stakeholders involved?
- Have we identified the customer's business needs and objectives?
- Do we understand their budget?
- Do we know their timeline?

[8:37] If your team isn't consistently gathering that information and being coached on the same qualification standards, your pipeline may look healthy on paper, but your conversion rates will likely fall short because the foundational work wasn't done upfront.

[9:07] Early in the sales journey, it's important to differentiate both your organization and your product.

Just as importantly, you need to develop a deep understanding of the customer's challenges so you can clearly position your solution as the best way to solve them.

Section 3: From Qualification to Close: What High-Performing Sales Pipelines Do Differently

[9:27] Joy: Can you share what success looks like at each stage of the sales process and how sales leaders can achieve it?

[9:35] Molly: Absolutely.

Using the Winning by Design framework, a typical sales journey consists of four key stages: qualification, discovery, validation, and proposal, leading to close. Each stage has its own objectives and success criteria.

[10:01] The first stage is qualification, and it's one of the most important.

At this stage, you need to determine whether the prospect—or an existing customer in an expansion scenario—has a genuine business need that should be addressed right now.

Questions like these are critical:

- Is this the right time to have this conversation?
- Are we a good fit to solve the problem?
- How urgent is the need?
- Who are the stakeholders involved?
- What has already been done to address the issue?
- What is the cost of doing nothing?

[10:51] Qualification is ultimately about confirming there's a genuine business need, an available budget, and agreement that the problem needs to be solved.

Once that's established, you can begin positioning your solution as the right fit.

[11:15] The next stage is discovery.

This is where you develop a much deeper understanding of the customers' challenges and begin connecting your solution to their specific business needs.

One mistake many sales teams make is hearing a high-level problem and immediately jumping into a product pitch.

[11:38] Instead, you need to keep asking thoughtful questions to uncover the true business impact.

By working through the discovery process thoroughly, you position your solution not as one of many options, but as the one best suited to address the customer's needs.

[12:17] From there, you move into validation and proposal.

You'll likely bring additional stakeholders into the conversation and revisit the pain points and desired business outcomes you've already uncovered.

If you've done the hard work during qualification and discovery, these later stages become much easier because the customer has already acknowledged both the problem and the value of solving it.

[12:51] By the proposal stage, the conversation should focus less on convincing the buyer they need your solution and more on finalizing the details—pricing, implementation, and rollout.

That's really the icing on the cake.

[13:03] I recently listened to a call from one of my team members where the prospect said:

"You've already sold us on Calendly. We know we need it. We know we need automation. We know it needs to be part of our tech stack. Now we just have to figure out how to make it happen."

For me, that's exactly what success looks like.

[13:32] When your buyer reaches that point, the remaining conversations are simply about packaging, pricing, and implementation—not whether they should buy in the first place.

That only happens when you've invested the time upfront to deeply understand their challenges and clearly demonstrate how your solution will deliver meaningful business results.

Section 4: The Role of Personalization in Modern Sales

[14:02] Joy: Molly, what level of customization or personalization should sales teams be applying at each stage? And how critical is that to the overall sales process?

[14:13] Molly: It's extremely important.

I realize I've said everything is important, and I'm certainly not trying to suggest that sales is easy—it isn't.

But personalization and customization are essential because you want your prospect—or your customer, in the case of an expansion opportunity—to know that you truly understand their business and what their day-to-day looks like.

[14:37] Think about a cold outreach scenario.

Your BDR or SDR is contacting someone who isn't expecting to hear from you, so how do you stand out?

One of the things I love seeing right now is the creativity in outbound prospecting, especially through personalized video messages.

People are doing incredibly thoughtful research.

[14:59] You can learn a great deal from LinkedIn—their background, education, previous roles, and mutual connections.

I always celebrate team members who create highly personalized outreach because that's what gets a prospect's attention.

[15:17] I'm sure both of us receive prospecting emails every day.

When I see a subject line like, "Molly, your time at the University of Florida," or "Molly, your time at Glassdoor," I immediately know the sender has done their homework.

At the very least, they've earned a minute of my attention to read what they have to say.

[15:42] That's why personalization and customization matter so much.

[15:46] But here's my other point, Joy.

Once you've captured a prospect's attention, you've accomplished the hardest part.

Now it's about making it as easy as possible for them to meet with you.

[15:55] This is where technology and automation become incredibly valuable.

Without a scheduling tool, you're often stuck in a back-and-forth exchange trying to find a mutually available time.

[16:14] Instead, if you include a scheduling link on your website or in your email signature, that personalized outreach you've invested time creating can immediately turn into a booked meeting.

That's how you efficiently move prospects into the top of your sales funnel.

[16:32] I can't emphasize enough the importance of leveraging technology and automation throughout that process.

Section 5: Thriving in Economic Uncertainty: Maximizing Pipeline Velocity

[16:46] Molly: This is certainly an interesting time to be in sales and technology, but I don't see that as a bad thing.

This is where the rubber meets the road. It's a real test of your sales team's stamina, your sales process, your value messaging, and your ability to differentiate your product.

[17:13] There are still plenty of opportunities to stand out.

We know buyers are facing budget constraints. We're seeing layoffs, tighter spending, and greater scrutiny around every technology investment.

As a result, buyers need to build a strong business case for every purchase, and every decision is being evaluated more carefully than ever before.

[17:44] Organizations are going to have to be increasingly innovative to secure new budgets and create room for additional technology investments.

[17:56] As a sales organization, your focus has to remain on ROI.

Throughout qualification and discovery, you need to clearly articulate the business impact your solution will deliver.

[18:10] For my teams—and for anyone I talk to in sales—your ROI story has to be crystal clear.

If buyers are requesting new budget or reallocating existing budget, you need to equip them with the data and insights that give them confidence your solution will move their business forward.

[18:39] That means selling more than product features.

It's about demonstrating how your solution will help customers operate more efficiently, drive stronger business outcomes, and ultimately achieve greater success.

[18:57] Finally, don't underestimate the importance of the user experience.

Asynchronous work is now the norm, and people simply don't have time for friction in either the customer journey or the user experience.

They expect experiences that are simple, fast, and seamless.

[19:15] As you invest in technology and refine your sales process, make sure you're eliminating anything that creates unnecessary friction—for both your customers and your internal users.

Today, more than ever, your product should be a pleasure to use, and your sales organization plays a critical role in communicating that value to buyers.

[19:55] If you're experiencing pipeline stagnation or low conversion rates, there are several areas to evaluate.

The first is your sales process itself.

[20:06] It's incredibly difficult to diagnose problems if you don't have a clearly defined sales process.

When each stage—from qualification and discovery through validation and proposal—has well-defined criteria, you can use CRM data to identify exactly where deals are stalling.

[20:39] For example, if you're consistently losing deals during the proposal or pricing stage, you can investigate that specific part of the sales journey.

Without clearly defined stage criteria, it's much harder to identify and fix bottlenecks.

[21:01] Maximizing pipeline velocity also requires acting quickly.

As soon as a prospect expresses interest and your solution is top of mind, you need to engage them without delay.

Those moments are too valuable to miss.

[21:30] Investing in technology that makes scheduling and engagement fast and frictionless increases your chances of connecting with prospects, growing your opportunity pipeline, and maintaining momentum throughout the sales cycle.

[21:45] Ultimately, clear pipeline definitions combined with the right technology help sales teams save time while driving stronger, more measurable business outcomes.

Section 6: Leveraging Technology to Improve Sales Execution

[22:06] Molly: Technology isn't just about saving time. It also plays a critical role in strengthening your demand generation strategy.

For example, my sales teams rely on several tools that connect directly to our demand generation efforts.

[22:19] Our marketing team works hard to build awareness and generate interest in Calendly—just like any organization looking to grow revenue.

It's essential that the sales organization knows where those leads are coming from, how they're being scored, and how to follow up effectively.

[22:42] If you're not using sales engagement platforms such as Outreach, Salesloft, or HubSpot.

These tools help improve top-of-funnel conversion by ensuring the demand your marketing team creates is captured, prioritized, and acted upon by the sales organization.

[23:16]Automation is only going to become more important.

One of the reasons I joined Calendly was because, in my previous sales leadership role, I kept thinking how valuable a scheduling automation platform like this would have been in solving many of the challenges my team faced.

[23:36] We're certainly not the only player in the market, but we're proud to be the market leader, serving more than 50,000 companies and over 10 million users.

I strongly believe every sales team should have scheduling automation in its technology stack because you want to make it as easy as possible for prospects to book time with your team.

[23:57] You never want scheduling delays to stall a deal.

That means including scheduling links on your website, in email signatures, and anywhere prospects are likely to engage with your sales organization, creating a frictionless experience from the very beginning.

[24:17] Another category of tools I highly recommend is revenue intelligence and revenue forecasting platforms.

Solutions like Gong, Clari, and Chorus have become incredibly valuable for sales organizations.

[24:43] These platforms do much more than simply record sales calls.

They use AI to analyze conversations, identify patterns, and provide insights into deal health and forecast accuracy, helping sales teams understand how likely opportunities are to progress through the pipeline and ultimately close.

Section 7: Metrics That Matter for Pipeline Performance

[25:58] Joy: What metrics should sales leaders focus on to improve pipeline performance?

Molly: It starts with understanding that you're never going to win every deal from the first conversation. That's why measuring activity throughout the funnel is so important.

When you consistently track your pipeline, you begin to understand your conversion rates and what it takes to generate predictable outcomes.

For BDR and SDR teams, I recommend measuring:

- Number of conversations held each week
- Outreach volume across calls, emails, and cadences
- Sales-qualified opportunities (SQOs)
- Discovery meetings booked
- Email engagement metrics

If you're not creating enough opportunities at the top of the funnel, you simply won't generate enough pipeline further down the sales process.

[27:23] As opportunities progress, the focus shifts from activity to execution.

This is where sales skills matter most—how you present pricing, who you involve in pricing conversations, and how effectively you connect your proposal back to the customer's business challenges.

I'm a strong believer in walking prospects through proposals live rather than simply emailing pricing. Those conversations should reinforce the business problems you've uncovered and clearly demonstrate how your solution addresses them.

Tracking proposal conversations is equally important because it helps establish performance benchmarks.

For example, if you know each seller needs to conduct four proposal reviews per week to achieve quota, you can measure progress long before the quarter ends.

Without those benchmarks, it's impossible to define success.

Metrics such as:

- Four discovery calls per week
- Two proposal conversations per week
- 2× pipeline coverage

provide a baseline that helps teams understand where they stand and where they need to improve.

[29:00] Today's economic environment makes these benchmarks even more valuable.

Budget constraints mean sales teams may need to generate more activity to achieve the same results.

But when every stage of the sales process is clearly defined, leaders know exactly where to invest coaching and resources.

[29:41] Joy: If you had to prioritize just two or three metrics, which ones would you recommend sales leaders focus on?

Molly: For account executives, the single most important metric is the number of discovery conversations they conduct each week.

A well-executed discovery conversation uncovers business pain, desired outcomes, and buying intent.

If your team follows a consistent discovery framework, you can measure how many discovery calls typically lead to a closed deal and use that as your operating benchmark.

If a seller isn't meeting their discovery targets, that's an early indicator they're likely to miss their revenue goals later in the pipeline.

For BDR and SDR teams, I focus on sales-qualified opportunities.

Their role isn't to run full discovery calls—it's to qualify prospects against a consistent framework and pass high-quality opportunities to account executives.

Strong qualification at the top of the funnel lays the foundation for healthier pipeline conversion throughout the rest of the sales process.

Section 8: Expanding Customer Relationships to Drive Growth

[32:08] Joy: With so much uncertainty in today's market, do you think expansion within existing accounts is still an achievable growth strategy?

Molly: Absolutely.

Expanding within your existing customer base is one of the smartest strategies during periods of economic uncertainty.

Rather than relying solely on acquiring new customers, organizations should look for opportunities to deepen existing relationships through upselling, cross-selling, and broader adoption.

When budgets are tight, winning net-new business becomes more difficult because customers often have to replace an existing solution rather than add another one.

Existing customers already understand your product and trust your organization, making expansion conversations far more productive.

The key is delivering an exceptional customer experience.

If customers genuinely enjoy working with you and see value in your solution, they naturally become advocates for your business.

Sales teams should proactively engage customers and ask:

- How can we help you succeed this year?
- What new challenges are you facing?
- Are there additional ways we can support your business?

These conversations often uncover opportunities to consolidate vendors or introduce capabilities customers may not realize they already have access to.

[35:36] Joy: You mentioned fracking. How can sales leaders leverage that strategy during periods of change?

Molly: I think of fracking as finding new sources of growth within your existing customer base rather than constantly searching for entirely new opportunities.

For sales and RevOps leaders, success starts with having a clear playbook that identifies the signals indicating when customers may be ready to expand.

Every business has different indicators.

At Calendly, for example, product adoption is one of our strongest expansion signals.

When we see widespread adoption across an organization, it's a natural opportunity to ask who else could benefit from using the platform.

Every company should identify similar product or customer signals that prompt proactive outreach.

Rather than waiting for customers to ask for more, sales teams should reach out with insights, demonstrate an understanding of how customers are using the product, and explore ways to deliver even greater value.

Ultimately, expansion depends on trust.

Customers need to believe that you understand their business challenges and are committed to helping them succeed—not simply selling another product.

Strong relationships become especially valuable during difficult economic periods.

When organizations need to reduce vendors or rethink spending, they naturally turn to partners they trust to help solve those challenges.

[39:04] Joy: Building those relationships really does make customers feel valued and creates long-term loyalty.

Molly: Exactly.

One of the best habits sales professionals can develop is giving customers value without asking for anything in return.

That could mean sharing a useful article, recommending a helpful resource, introducing them to someone in your network, or offering insights that help them succeed in their own role.

These "gifts" strengthen relationships over time and build trust.

Then, when customers need advice or are ready to expand their partnership, they already view you as a trusted advisor rather than simply another vendor.

Section 9: Final Recommendations for Building a High-Velocity Sales Organization

[40:43] Joy: As we wrap up, what are your top recommendations for sales leaders looking to improve pipeline velocity and build a stronger sales organization?

[40:56] Molly: No matter the size of your company or the average deal size, every sales organization needs a defined sales process.

If you've hired people to drive revenue, you need a clear framework they can follow from start to finish. The complexity of that process may vary depending on your business, but having one is essential.

[41:18] I'd also encourage sales leaders to invest heavily in qualification and discovery.

Your best sellers should be able to guide customers through a business outcome-focused discovery conversation that uncovers clear pain points, business impact, and ROI.

Every stage that follows—from pricing discussions to contract negotiations—should consistently tie back to the customer needs and business objectives identified early in the process.

[41:57] Finally, invest in the customer experience.

Differentiate your organization through a seamless buying journey, an exceptional user experience, and authentic relationship-building.

If you combine a strong discovery process with a customer-first mindset throughout the customer lifecycle, you'll create stronger customer relationships and significantly improve retention.

[42:34] I'm naturally optimistic, but I also believe challenging economic conditions create the greatest opportunities for sales teams to stand out.

When the market is booming, success comes more easily. But when budgets tighten and competition increases, the best sales organizations distinguish themselves through preparation, persistence, and execution.

[43:10] Within our team, we constantly emphasize grit—doing the hard things, going the extra mile, and making no excuses.

For sales professionals who embody those qualities, this is the time to shine and separate themselves from the competition.

Fortunately, I believe we're building that kind of culture at Calendly.

[43:43] Joy: Molly, thank you so much for sharing these valuable insights. I'm sure they'll help sales organizations optimize their pipeline and drive stronger performance.

[43:48] Joy: Molly McKinstry, Head of Sales at Calendly, thank you for joining us.

[43:51] Molly: Thank you.

Joy: And thank you for watching this episode of the CXO Masterclass.

[END]