NEXT LEVEL CATAPULT

SALES OPERATIONS & CULTURE RESET PLAYBOOK

Playbook Summary Guide

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About
Sales Operation & Culture Reset

At Next Level Catapult, we believe that sales culture is not defined by motivational slogans or compensation plans, it's defined by the daily behaviors, systems, and accountability that shape how teams sell, lead, and grow. When we are brought in to "reset" a sales culture, we are helping an organization reconnect its sales motion to its mission, and align its people around shared expectations and values that drive performance.

This Sales Culture Reset Playbook is designed as our 90-day and beyond implementation guide. It walks you through how NLC partners with our client's sales leadership and executive sponsors to evaluate, realign, and activate a stronger, more disciplined sales culture. It is both a roadmap and a coaching framework designed to be read, referenced, and used actively throughout our engagement.

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Our Philosophy

We approach culture change through three beliefs:

1. **Transparency builds trust.** When everyone understands expectations and outcomes, the sales environment becomes more accountable and less political.
2. **Accountability drives growth.** Sales leaders who model discipline create teams that perform consistently.
3. **Coaching transforms capability.** Culture resets succeed only when leaders learn to coach, not just manage.

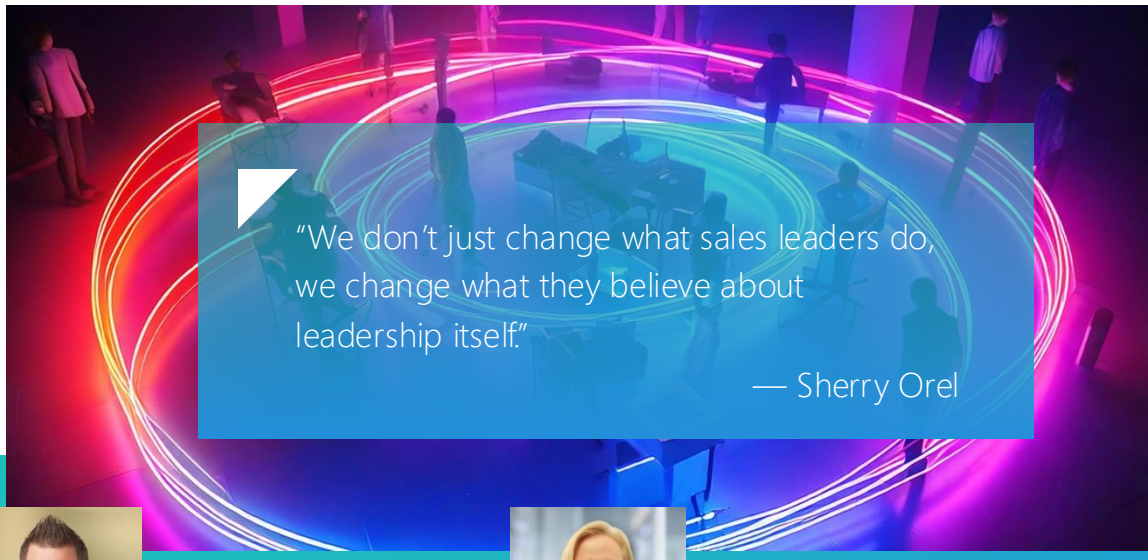
To accomplish these objectives, we understand that at the core of any desired behavior change is developing the HABITS that leads to predictable outcomes, so we embed within this journey a consideration of the human element. These principles guide every step of the 90-day reset journey.

About Next Level Catapult

Our Mission

At Next Level Catapult, we help leaders build cultures that sell with purpose, integrity, and clarity. We believe high-performing teams are built when leaders model discipline, organizations embrace transparency, and everyone understands how their work drives growth. Our mission is simple: to elevate leadership and sales performance through accountability, coaching, and clarity.

https://nextlevelcatapult.com/sales-training/



Meet The Team

Brad Hajart - Co-Founder

Brad brings over 20 years of executive sales leadership experience. His approach blends strategy with empathy, helping leaders see the patterns behind performance. He focuses on simplifying complexity and turning accountability into empowerment.

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Sherry Orel - Founder

Sherry is a 4-time CEO with 30+ years experience leading and advising high-growth organizations in both corporate and entrepreneurial settings. She is known for helping leaders translate cultural aspirations into actionable systems that sustain performance and engagement.

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What Success Looks Like

By the end of this 90-day process, you will see:

- **Clear accountability:** Every sales role knows exactly what success looks like and how it's measured.
- **Aligned leadership:** Sales leaders are equipped to coach, not just inspect.
- **Predictable performance:** Dashboards and metrics tell the truth about activity and outcomes.
- **Engaged team culture:** Sales meetings, one-on-ones, and forecasting become performance rituals, not administrative chores.

We view this as the foundation for ongoing growth, not a temporary project, but the start of a new leadership rhythm.

How to Use This Playbook

For Sales Leaders:
Use this as your roadmap for what's coming and how we'll work together.

For Executive Sponsors:
Use it to monitor progress, support leadership alignment, and ensure change cascades across departments.

For the NLC Team:
Use it to guide consistency and ensure transparency at every stage.

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Why the Sales Culture Reset Works

Most sales organizations know what they want: revenue growth, better forecasting, and more predictability. What's often missing is clarity on how daily behaviors and leadership habits connect to those results.

Our process addresses that gap by:

- Making the invisible visible, showing where culture supports or blocks sales performance.
- Establishing measurable behavioral standards that can be coached and repeated.
- Building leadership systems that sustain high performance long after our engagement ends.

Our 90-Day Framework

The reset follows three structured phases.

Phase	Duration	Primary Focus	Key Deliverables
Assessment	DAYS **0–30**	Understanding the current sales environment, systems, and leadership culture.	Findings White Paper, Sales Culture Health Index
Strategy	DAYS **31–60**	Designing the behaviors, expectations, and systems that will define the new sales culture.	Revised Sales Playbook, KPI Scorecard, Coaching Roadmap
Rollout	DAYS **61–90+**	Implementing new habits, cadences, and leadership routines that embed cultural change.	Team Training, Progress Dashboard, Executive Feedback Loops

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Phase 1: Assessment (Days 0-30)

The first 30 days of any cultural reset are about discovering the truth beneath the numbers. This phase is where we listen, observe, analyze, and begin to understand how your team, your processes, and your systems truly operate today, not just how they were designed to operate. Our goal in this phase is to uncover the realities of your sales organization so we can address them with precision.

We often tell our clients:

"You can't fix what you can't see."

In this stage, we make the invisible visible.

Objectives

- Diagnose current sales culture, behaviors, and systems.
- Identify leadership strengths, process gaps, and data integrity issues.
- Establish baseline measures of sales effectiveness and cultural health.
- Build trust and transparency with your sales leader and broader team.

This phase lays the foundation for every decision that follows. The quality of the reset depends entirely on the quality of this assessment.

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Phase 1: Assessment (Days 0–30)

Objective: Understand the current reality of the sales culture, leadership, and systems.

Task	Start	Purpose / Outcome	Frequency	✔
Conduct kickoff alignment call with executive sponsor and sales leader	Day 1	Establish scope, expectations, and communication cadence	One-time	☐
Review all relevant sales documentation (process maps, org charts, compensation plans, CRM dashboards)	Week 1	Understand context and performance systems	One-time	☐
Schedule and conduct executive interviews (CEO, CFO, Ops, Marketing, etc.)	Week 1	Capture top-down view of sales culture and accountability	One-time per stakeholder	☐
Schedule and conduct sales leader discovery sessions (2–3 sessions)	Week 1–2	Understand leader's perspective, confidence, and challenges	Weekly for first 2 weeks	☐
Observe at least two sales meetings (team or pipeline)	Week 2–3	Evaluate tone, engagement, and meeting quality	2+ meetings	☐
Conduct cross-functional stakeholder interviews (delivery, account mgmt, finance)	Week 2–3	Understand sales culture through other departments' eyes	One-time	☐
Perform CRM audit (with sales ops guidance first, then independent review)	Week 2	Assess CRM hygiene and usage patterns	One-time	☐
Develop and distribute Sales Culture Health Index (SCHI) survey	Week 2	Quantify perceptions of accountability, clarity, and leadership	One-time	☐
Begin coaching relationship with sales leader (first 2 sessions = discovery-based)	Week 2–4	Build trust and identify developmental priorities	Weekly	☐
Compile and analyze all findings into Assessment Summary / White Paper	Week 4	Document insights, risks, and cultural patterns	One-time	☐
Present Findings Review to executive sponsor and sales leader	End of Week 4	Align leadership on truth of current state and next steps	One-time	☐

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Phase 2: Strategy (Days 30–60)

By the time we reach this stage, we've earned the right to design change that fits the organization. The Strategy Phase is where insight becomes structure, where we take everything we've learned in the Assessment and translate it into behaviors, metrics, and leadership rhythms that will define the new sales culture. This is the phase that often feels like "clarity" to our clients. After weeks of uncovering what's broken or inconsistent, we start designing what good will look like and exactly how to get there.

This is not a "one-size-fits-all" redesign. It's built to fit the organization's DNA while introducing the discipline of proven best practices.

Objectives

- Define the new expectations and standards for sales performance.
- Establish measurable KPIs and leading/lagging indicators.
- Design the systems, meeting cadences, and leadership practices that sustain accountability.
- Create a coaching roadmap for sales leadership development.
- Build a cultural blueprint that connects people, process, and performance.

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Phase 2: Strategy (Days 31–60)

Objective: Turn insight into structure — define the behaviors, systems, and leadership practices that will drive the new culture.

Task	Start	Purpose / Outcome	Frequency	✔
Facilitate strategy kickoff session with sales leader	Week 5	Align on priorities, define reset goals	One-time	☐
Lead sales process review and redesign	Week 5	Document clear, stage-based sales process	Multiple working sessions	☐
Develop Sales KPI & Scorecard Framework (leading and lagging indicators)	Week 5–6	Identify key metrics that predict success	One-time	☐
Co-create Behavioral Expectations Matrix with sales leader	Week 6	Define “old vs new” culture behaviors	One-time	☐
Draft Sales Meeting & Coaching Cadence Framework	Week 6	Establish rhythm of accountability (stand-ups, 1:1s, etc.)	One-time	☐
Build 12-Month Sales Leader Coaching Roadmap	Week 6–7	Design 60-day sprints for leadership development	One-time	☐
Conduct Readiness & Risk Assessment	Week 7	Identify any structural or leadership barriers to rollout	One-time	☐
Align with executive sponsor on rollout timing and resources	Week 7	Confirm readiness before activation	One-time	☐
Deliver Strategy & Recommendations Deck	Week 8	Present the designed playbook and action plan	One-time	☐

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Phase 3: Rollout (Days 60–90+)

The Rollout Phase is where strategy becomes action. Up to this point, we've listened, observed, designed, and planned. Now, we activate, embedding the new expectations, processes, and leadership behaviors into daily routines that drive measurable improvement. This is also where we see cultural resistance and breakthrough side by side. The Rollout is about persistence, not perfection. Our job is to help sales leaders own the new way of operating and guide the team through the transition with clarity and confidence.

Activating and Embedding the Change

Objectives

- Launch the new sales playbook, KPI scorecard, and meeting cadence.
- Facilitate early adoption of new tools, dashboards, and accountability structures.
- Coach sales leadership through real-time implementation challenges.
- Establish feedback loops to refine the system as it scales.
- Begin transitioning ownership of the process fully to internal leadership.

The key word here is "modeling." We model behaviors, lead early meetings, and gradually hand off control to the client's sales leader once consistency is visible.

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Phase 3: Rollout (Days 61–90+)

Objective: Implement and embed the new systems, leadership rhythms, and cultural behaviors.

Task	Start	Purpose / Outcome	Frequency	✔
Conduct Sales Playbook Launch Session with full sales team	Week 9	Introduce new processes, KPIs, and behaviors	One-time	☐
Facilitate Daily Stand-Ups (modeling phase)	Week 9–10	Demonstrate effective tone and structure	2 weeks	☐
Lead first Weekly Sales Meeting(s)	Week 9–10	Model meeting format and coaching language	2 weeks	☐
Co-facilitate 1:1 Coaching Meetings between leader and reps	Week 9–10	Demonstrate Managing Up framework	2 weeks	☐
Review and finalize Sales Leader Transition Checklist	Week 10	Ensure ownership transfer readiness	One-time	☐
Review and adjust dashboards and trackers	Week 10–11	Ensure metrics visibility and accuracy	Weekly until stable	☐
Continue weekly coaching sessions with sales leader	Ongoing	Support leader through implementation issues	Weekly	☐
Hold monthly check-in with executive sponsor	Week 11	Share progress and alignment summary	Monthly	☐
Gather team feedback / pulse survey	Week 12	Measure early adoption sentiment	One-time	☐
Conduct post-rollout debrief with sales leader	End of Week 13	Review results and lessons learned	One-time	☐
Deliver 90-Day Progress Summary to executive sponsor	End of Week 13	Show results, wins, and recommendations for sustainability	One-time	☐

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Phase 4: Ongoing Coaching & Sustainability (Beyond Day 90)

Objective: Maintain the gains and help the leader evolve from implementation to mastery.

Task	Start	Purpose / Outcome	Frequency	✔
Continue weekly 1:1 coaching with sales leader	Day 90+	Support leadership growth and consistency	Weekly	☐
Conduct monthly executive sponsor check-ins	Day 90+	Maintain alignment and transparency	Monthly	☐
Facilitate quarterly sales strategy workshops	Quarterly	Review performance, set goals, and develop team	Quarterly	☐
Re-administer Sales Culture Health Index (SCHI)	Quarterly	Track cultural progress	Quarterly	☐
Refresh scorecard metrics and goals	Quarterly	Reflect evolving business targets	Quarterly	☐
Conduct annual reset review	12 months	Evaluate progress and readiness for new cycle	Annual	☐

How to Use This Checklist

- Treat it as a timeline and accountability tracker.
- Review weekly to confirm each milestone is completed or in progress.
- Use it during internal NLC stand-ups to ensure consistency across coaches.
- For clients, it becomes a visual roadmap of where they are in the journey.

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