Digital Sales Transformation: The Shift to Intelligent Selling

An interactive workbook designed to support modern sales organizations & their shift to digital selling.

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Introduction

As our world progresses with an ever-changing landscape of technology and our attention shifts to digital channels, we are challenged as organizations try to keep up. Data and attention have become the currency of modern corporations, and as a friend of mine at Accenture once shared, "The pace of change will never be as slow as it is today."

In this perfect storm, we find ourselves facing challenges that fundamentally change what has worked and what is working in our modern business environment. From decreased quota attainment across sales organizations to the increased difficulty to cut through the noise, technology is making it both harder and easier to connect in a meaningful way with prospects and customers.

Just as our strategies and solutions must continually be re-assessed, this workbook is designed to be iterated. It is not a one size fits all solution for Digital Transformation. Nor is it an answer to all questions and challenges you might have, or be facing within your organization. It is instead, a reset — a way to evaluate where your organization is today, and a tool to help you dream up where it could be in the months and years to come. I challenge you to share this workbook and bring up the questions within its pages to members across your organization to spur deeper discussions and drive a want for continuous improvement.

In my time as a marketing professional, I have worked with and sold to sales organizations ranging from Fortune 500 companies to lean hyper-growth startups. Many of the challenges they face are similar and fall into the categories identified in this book. We look forward to sharing our findings and thoughts with you and hope this workbook finds a place within your sales strategy and adds value across your organization.

Tim Harris
Vice President of Marketing

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The Shift to Intelligent Selling

A digital disruption has occurred within the sales profession.

The rising costs and diminishing profit margins associated with outside sales have led sales leaders to look for alternative ways to improve performance. As these challenges persist, we bear witness to emerging startups embracing digital that have rivaled market leaders with sales forces a fraction of the size. These organizations have learned to leverage data and new technology in ways that multiply productivity and increase their engagement with buyers. Now this shift has spread, challenging organizations of all sizes to evolve or become obsolete. As a result, we have witnessed both the changing demands of the customer and a necessary shift toward a more intelligent way of selling.

Accenture research found that customers are 57% through their buying process by the time they take their first meeting with a sales representative. Changing B2B buying behaviors and increased competition are the driving forces for digital selling. Ultimately, sales reps need to adapt to B2B buyers, and teams must shift to accommodate a new B2B buying process. B2B buyers are now self-reliant, meaning they do most of their research across social and digital channels before deciding to engage with sales. In a world where the B2B buying process is increasingly going social and digital, sales reps need to be equipped to evolve their engagement strategies as intelligently and efficiently as possible. A new era of sales is upon us, and we must adapt.

Customer service SaaS platform, Gladly, reported that 71% of consumers want a consistent experience across all channels, but only 29% say they get it. Intelligent selling has also naturally resulted in a shift toward data-driven decision making. Customer engagement now takes places across social and digital channels — creating massive amounts of personalized data points. Sales leaders must rely on marketing and sales operations to capture accurate and relevant data to help sellers provide the best customer experience possible. Buyer characteristics, engagement insights, and data analytics are foundational to powering an intelligent B2B customer buying journey. Leaders must continuously look for ways to get a step ahead on the trail. Are you ready to face these challenges and take your organization to the peak of sales performance?

> ## 88% of B2B transactions start online.
>
> - Accenture

Six Current Day Challenges in Modern Sales

Six Current Day Challenges in Modern Sales

01

Enabling your sales force with the tools needed to drive success in an increasingly digital age.

$66 Billion spent annually on sales training and enablement technology with unsatisfying results. (Emplay)

Too many tools deployed without clear architecture. 80% of organizations have at least ten disparate sales tools, all creating siloed data and acting independently. (Dreamforce Survey)

Current tools need major redesigns to be effective. 56% felt sales tools not customized to their needs. Many sales reps see these tools as a barrier rather than an enhancer. (Accenture Survey)

02

Better aligning sales and marketing teams to ensure efficiencies, reduce costs, and drive results.

Sales and marketing teams tend to think they are responsible for different parts of the sales funnel, confusing roles, definitions, and Service Level Agreements (SLA).

Create the Sales Development Representative role. The SDR function has become a necessary role for companies adopting a digital sales model. The SDR role sits in the middle of Sales and Marketing and helps further qualify marketing-generated leads to identify sales opportunities faster.

03

Using data to gain greater insight into opportunities, track performance, and improve forecast accuracy.

Data was the number one challenge faced by salespeople of the 1,700 companies surveyed. (Forbes).

Research by the Aberdeen Group found companies with accurate sales forecasts are 10% more likely to grow revenue year-over-year.
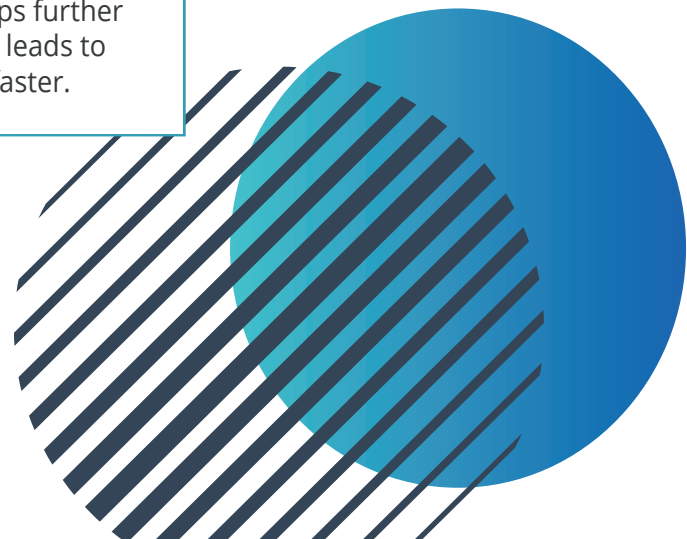
04

How do you drive transformation through a sales organization?

Forming your strategy around adopting a new tool or technology will not lead to a successful transformation.

Gartner reported that nearly half of companies undergoing digital transformation projects have no metrics or KPIs established.

05

Cutting through the complexity of the purchase journey and reducing customer friction.

Customers switch vendors as often as they'd like until they find a solution that not only solves their problem but also continues to help them evolve through market shifts.

In The State of Sales Report by Salesforce, 78% of business buyers reported they seek trusted advisors — not just salespeople — that add value to their business.

06

Ensuring the right organizational structures are in place to attract, retain, and develop top sales talent.

The World Economic Forum recommends that organizations beginning their digital transformation journey should invest in a holistic talent strategy that takes into consideration a multidisciplinary approach, including leadership, technical, and behavioral traits.

At a higher level, organizations should also consider investing resources into creating an organizational culture that puts people first, and that understands how technological change affects employees first-hand.

Why is Digital Transformation Such a Challenge?

Digital transformation across revenue teams is not an easy feat.

Challenges often arise within large change initiatives and sales leaders must become aware of these challenges in order to better address organizational needs. It will take more than just Sales to develop a formal plan and confront the larger obstacles affecting digital transformation.

> **84% of digital transformation projects fail to deliver their expected benefits equating to colossal missing ROI, as well as the collateral damage to business strategy, shareholder value, and team morale**
>
> *- Forbes*

Along with knowing your team and their current sentiment toward change, make sure to review the following four obstacles to digital transformation and incorporate these topics into your discussion and planning.

Four Obstacles Affecting Digital Transformation:

Digital sales transformation strategy misaligned with broader business strategy: The biggest challenge that sales leaders face is struggling to align the digital sales transformation strategy and objectives to the overall business strategy. When these objectives

are misaligned, the lack of support from executive leadership results in limited investment in the resources required to affect change. Therefore, aligning on top-line objectives, focusing on your customer, and developing an aligned view of the customer experience is an excellent place to start as it takes into consideration both net-new customers and retention or expansion of opportunities.

Lack of executive support: You need the buy-in of your entire executive leadership to build cross-departmental alignment because each function has a role to play in building out the customer journey. Typically marketing and sales teams lead the shift to digital, but the proliferation of data, increase in capabilities and complexities of technologies, and the digitization of information causes a significant skills gap that requires the help and alignment of additional functions. Managing the data, processes, and technology that makes up the customer experience engine is no easy task and has forced many organizations to rethink the structure and alignment of their revenue teams.

Not willing to adapt to change: Digital transformation starts with people who are willing to adopt a new mentality and culture to do things differently. As with any transformation, change can be unsettling for different people at different times. It isn't just about adopting a new tool or system that will automate everything. Your sales team and project stakeholders need to be open-minded about going digital, and understand that there will be challenges and unknown obstacles to solve along the way. It will take teams from multiple departments to solve these challenges — some of whom may see things from opposing sides, and some that may need help in understanding the interdependencies needed to successfully solve certain challenges.

Not taking into consideration post-launch execution: Most organizations focus only on the planning and launch of digital sales transformation and forget to invest time and resources to ensure adoption and scalability post-launch are successful. If your planning and initial execution do not support long term success and continual improvement, realizing ROI from digital transformation will be a challenge. Digital transformation is not a one and done process; it requires constant adaptation and iteration for refinement. Setting up continuous feedback loops and benchmarks toward your objectives are critical.

Understand Your Current Landscape

Developing a Path Toward Clear Communication

If you have not realized this by now, successful digital transformation requires a significant commitment around organizational alignment. Clear communication is vital at every step of the process. Before any change takes place, it is essential to gain buy-in and effectively communicate the changes taking place. Where this seems to be a struggle always is within the alignment of marketing, sales, and customer success. These are the three departments that have the most significant impact on customer experience and also where goals should be aligned and transparent, but rarely are.

> ## The single biggest problem in communication is the illusion that it has taken place.
>
> - George Bernard Shaw

It can feel like a big game of finger-pointing between Marketing, Sales, and Customer Success teams. Marketers generate qualified leads, but tend to think Sales never manages marketing leads correctly. Sales tend to think marketing leads are poor quality, so they decide to only self-prospect without validating or sharing feedback. Alternatively, Sales has a prospect that closes in less than 30 days, but if the customer becomes dissatisfied, they blame Customer Success.

The finger-pointing becomes an issue when departments are misaligned, or miscommunication arises. This results in fractured customer experiences and disconnected processes. The handoff of information between teams tends to be where these issues occur and cause miscommunication. A critical question to answer will be, "How do you improve communication between different roles?"

The Game of Finger Pointing

Marketing

Sales

Customer Success

Revenue + Insight

Generate Leads

Sales never manages our leads correctly.

Why is sales not doing their job?

Sell Products/ Services

Marketing leads are horrible. I'll find my own.

It was a perfect fit, they purchased in less than thirty days. Why is that new customer unhappy?

Retain Customers

This customer has no understanding of our product.

Who told this client that we could do that?

Grow Revenue & Intelligence

Why are you sending that email to this prospect while I'm on a demo with them?

Where can I find the notes about this customer's use case?

Three Guiding Principles To Help Overcome Objections

Still stuck in a game of finger-pointing across teams? Team alignment and continued focus are never easy. Trying to agree upon a central point of truth, shared dashboards and reports, or a single technology solution to use across departments can cause frustration and sometimes a complete stalemate.

Many of these challenges can be avoided if you first establish your guiding principles for transformation. At the start, try using these three principles (or modify them to fit your organization better) to refocus discussions and help drive alignment when the going gets tough.

Integrated Marketing, Sales & Support

We believe in a seamless integration of the revenue team across marketing, sales, and customer support activities and opportunities. The opportunity cost of not connecting the customer experience is too great not to solve for today. This objective is critical to our organizational success and continued growth, and will be a mentality we foster across all teams.

Data Driven Strategy

We will make decisions based on data and will work with the best information we currently have available while continually identifying gaps for future iteration and improvement. Relevant and actionable data from a single point of truth (our CRM) will drive revenue decisions and strategy. Buyer characteristics and smart engagement analytics will power an intelligent B2B customer buying journey.

Intelligent Sales Engagement

We will focus on the metrics that guide intelligent sales engagement and quantifiable outcomes rather than purely activity. To better understand what works, we will focus on capturing both quantitative and qualitative data points to help drive decisions.

Tomorrow's leaders need a system that is intelligent enough to look across all existing data and recommend next steps. To do this, your organization needs high-quality data that captures both quantitative (activity-based) and qualitative (context-based) data points. From that foundation, prescriptive selling and AI can then be added to drive a dynamic, digital, and automated customer-centric B2B sales experience.

Aligned Teams Create Growth

As a buyer, our best buying experiences are those that are cohesive from end to end. They are curated to meet our individual needs and are supportive of our goals and objectives. Many organizations oversimplify the work and commitment it takes to create a cohesive buying experience.

Marketing, sales, and customer success are all roles that impact revenue and play a crucial part in this experience. Many organizations are now interconnecting these three departments and working to define a shared set of KPIs and objectives through the use of Revenue Operations. Some organizations are even developing a Chief Revenue Officer role within the executive team to help guide this alignment. Tasking these customer-facing departments with the same metrics for success forces them to build a shared vision and align on goals.

Alignment between revenue teams is critical to avoid miscommunication, increase alignment, and help Sales gain greater visibility and understanding into marketing and customer success processes and vice versa. You can create better interdepartmental visibility by understanding each team's challenges.

Sirius Decisions found that B2B organizations with aligned revenue teams achieved 24% faster growth and 27% more rapid profit growth over three years.

Essentially, digital sales transformation is about each team learning to work collaboratively with other departments to improve the customer experience and increase revenue faster. Sales leaders should focus on developing a streamlined process that makes communication transparent and easier between departments to help Sales embrace the digital paradigm. Sales leaders can start by getting buy-in from each department leader so that the entire organization can fully support sales reps at any point in the customer journey.

A Collaborative Process Across Revenue Teams

Marketing

Sales

Customer Success

Revenue + Insight

Generate Leads

Industry, account and persona specific engagement & messaging across all channels.

Provide support across the entire sales process.

Engage new and current customers with value-add content.

Sell Products/ Services

Drive use-case defined engagement that is aligned to specific products & services.

Stay engaged and work with additional business units as the account grows.

Retain Customers

Continuous engagement orchestrated across multiple levels of the organization with role-based messaging.

Create additional revenue opportunities and capture referrals

Grow Revenue & Intelligence

Data-driven decision making & investments based on prior success & identified opportunities.

> **An astonishing 90 percent of companies that embrace this new approach are not only delivering above-market growth but also sustaining it over time.**
>
> - McKinsey & Company
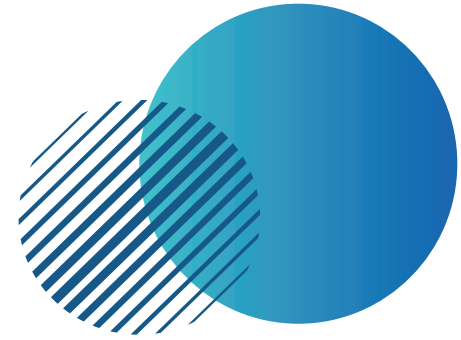
Essential Components of a Digital Sales Transformation Approach

Planning for Transformation: 5 Essential Components of Any Digital Transformation Process

Organizations need to think carefully about the transformation they are attempting. A clear and defined business strategy needs to be decided upon with all stakeholders before investing any resources. Your organization's broader business strategy should be the guiding force of your digital sales transformation journey. From there developing and executing the changes will be easier to manage.

Objectives

A shared set of objectives and KPIs for the project and its expected results.

Process

A clearly defined and understood process shared with all members of the team.

People

Aligned departments with the correct talents, skills & abilities.

Technology

The tools used to support people & their process.

Results

What are the expected and measured results.

Objectives

Set Clear Objectives and Key Performance Indicators (KPIs).

The biggest reason digital transformation initiatives fail is that most organizations lack clearly defined objectives that align with that business's broader strategy and goals. The purpose of transforming Sales, or even an aspect of Sales, should be to solve at least one of the higher business goals in the organization.

Taking on digital sales transformation is overwhelming for sales leaders. In the journey itself, many sales leaders forget one essential component in their digital transformation initiative — maintaining a data-driven mindset throughout the entire transformation journey. This includes setting benchmarks in the beginning and utilizing Key Performance Indicators (KPIs) to guide your progress.

Gartner reported that nearly half of companies undergoing digital transformation projects have no metrics or KPIs established.

Leading with a data-driven mindset will increase efficiency and agility throughout every step in the journey. KPIs must be created, continuously monitored, and be relevant to the objective. Only then can a KPI be a good indicator of success.

Your digital sales transformation objectives should center around accelerating the buyer journey and improving that experience. As we reviewed in the previous section, focusing on improving the customer journey will also create objectives that span into both Marketing and Customer Success. This type of objective setting is healthy for the organization. Although it will cause a more complicated process, it can make a much more significant impact on higher-level business objectives.

Objective Setting

WHERE DO YOU SEE THE BIGGEST CHALLENGES FOR FRONT LINE EMPLOYEES SUCH AS SDRS AND AES?

WHAT KPIS DO YOU CURRENTLY TRACK AND MEASURE AT EACH ROLE?

WHAT DATA POINTS WOULD HELP YOU MAKE MORE INFORMED DECISIONS AS A LEADER? AS A FRONTLINE SELLER?

WHERE IS THE MOST TIME TAKEN UP IN YOUR DAY? IN YOUR TEAM'S DAY?

WHAT IS ONE IMPROVEMENT THAT WOULD MAKE A MATERIAL DIFFERENCE IN YOUR SALES ORGANIZATION?

Process

Define Your Lead To Revenue Process

The next step is to begin to identify and then refine your digital process. Consider in-depth customer interviews to help you learn where your current sales process might have gaps or weaknesses. Start to look at simple or transactional tasks first. These tasks can quickly be automated, and can almost immediately support the enablement of your people. Ask your current customers for feedback on your business's strengths and weaknesses. If that isn't possible, consider using focus groups of your ideal customer profile to identify potential gaps in your sales process and the overall buyer experience. What questions are they left to figure out? Where are they looking for more or less engagement from sales? Is there a gap in skills that can you can identify? Digital transformation in Sales should always begin with a diagnostic type of assessment to understand what phase in the sales process might require more investment and resources.

Once you identify gaps or weaknesses in your current sales process, consider taking a multi-phase approach in your transformation. Every Sales organization has some sales process they follow. Consider mapping each of the proposed stages to your sales process, and then map them so they align to your customer journey. A multi-phase transformational approach allows you to break the larger project into smaller, more manageable steps. Don't forget to work with Marketing, Customer Success, and other departments that have an impact on your sales organization. Both handoffs are critical to the success of the organization. Each department can benefit from each other's insights when a process is followed and measured. Working with Marketing and Customer Success will give you the resources you need to enhance the customer experience. Marketing has a significant role to play in a digital engagement strategy, and sales should make sure they are leveraging their resources.

Process Discovery

IS YOUR SALES PROCESS CLEARLY DEFINED AND DOCUMENTED?

WHAT ASPECTS OF YOUR SALES PROCESS ARE TRANSACTIONAL OR RELY ON VERY LITTLE HUMAN CUSTOMIZATION OR INTERPRETATION?

WHAT PART OF YOUR PROCESS IS LEAST LIKED BY THE TEAM MEMBER EXECUTING IT?

WHAT STEP IN YOUR PROCESS HAS THE BIGGEST DRAG ON DEAL VELOCITY?

People

Identify Talents and Provide Support

Digital transformation is driven by people and supported by culture. It will require alignment across different levels of your sales organization as well as collaboration across departments and business units. Communication will be critical to help your organization navigate the challenges that digital can present as well as a commitment to change when challenges seem daunting or alignment unreachable.

Many employees often fear digital transformation because many still believe that going digital means losing their jobs to automation. Sales leaders must create a supportive organizational culture that fosters the willingness to adapt to change. Communicate with your sales reps that undergoing a digital sales transformation will not take their jobs away. They'll learn new selling skills, and potentially new sales technology expertise that will prepare them for any future sales role. Helping them see the potential for increased sales and commissions will garner their buy-in to transform sales into an intelligent, digital-first sales model.

> **78% of business buyers seek trusted advisors — not just salespeople — that add value to their business.**
>
> - Salesforce State of Sales Report 2018.

Once you have buy-in from your stakeholders and your team, you can start with identifying what expertise you may already have on your side. Rely on those experts who may have already gone through a digital sales transformation at a previous job or who have in-depth industry knowledge in a particular segment. They could help you make informed decisions by sharing what may or may not work to help avoid any possible setbacks. Some members of your organization will adapt quickly and will help support the changing dynamics within each role. You may also have sales reps that will take longer to grasp new digital sales concepts. A large part of your transformation journey should include investment in training your sales reps on the fundamentals of your customer journey and sales process. Does your organization have a sales enablement team that can help develop training materials? If not, bring in inside sales experts to help train your reps for success.

People Discovery

WHO WITHIN YOUR ORGANIZATION IS DIGITALLY FLUENT OR AN EARLY ADOPTER OF TECHNOLOGY?

WHO MIGHT BE A DETRACTOR WITHIN YOUR ORGANIZATION?

WHAT DEPARTMENTS WILL NEED TO BE INVOLVED TO COMPLETE YOUR OBJECTIVES?

DO YOU HAVE A FORMAL PLAN FOR CHANGE MANAGEMENT, TRAINING, AND FEEDBACK?

WHAT ARE THE CURRENT PAIN POINTS FACING YOUR TEAM TODAY?

Technology

Use technology to enhance people and process.

Most organizations believe that digital transformation happens simply by adopting new technology and creating simple automation. That is where many organizations fail to make change successful. Technology will not fix broken processes or alleviate the need for training your people. It should only be applied to enable new capabilities for your people or enhance a current process. Once you have defined your process, you can determine if your existing tech stack will integrate with your established process and business objectives.

Technology should first focus on enabling the front lines of your sales organization rather than merely being a tool to manage and monitor their activities. Take time to understand what a day looks like for each of the roles within your sales organization. Use feedback from your team to better understand the sticking points and challenges they face in completing their job each day. Also, construct a technology stack with a holistic view and make sure to confirm that each layer of technology that you add will work with your existing solutions.

Shy away from trying to find a single solution that solves all of your problems. Instead, look for solutions that build out a complete ecosystem for your sellers. Keep in mind that your data, and typically your CRM, are at the foundation of this technology stack. When evaluating tools, make sure to develop a diverse buying group that can represent the user, the manager, the technical administrator, and a security and compliance officer to support any changes. Technology should simplify agent workflows. Simplifying basic things like the number of platforms, logins, and windows needed to perform their daily jobs should be limited as much as possible.

Technology Discovery

WHAT ARE THE BUSINESS ISSUES YOU ARE TRYING TO SOLVE WITH TECHNOLOGY?

WHAT TECHNOLOGY IS CURRENTLY PART OF YOUR TECH STACK?

HOW DO YOU ASSESS YOUR CURRENT TOOLS AND EVALUATE NEW TECHNOLOGY?

WHAT TOOLS DO YOU HAVE THAT YOU FEEL ARE UNDER UTILIZED?

WHAT TOOLS HAVE MADE THE BIGGEST IMPACT WITHIN YOUR ORGANIZATION?

DO YOU USE TOOLS THAT ARE SHARED ACROSS OTHER DEPARTMENTS?

DOES YOUR ORGANIZATION CURRENTLY LEVERAGE CRM TO ITS FULL POTENTIAL?

✔ Results

Measure what matters.

Engage your executive team or board members to find out what is important at a top-level. Leadership will often look at high-level metrics associated with benefits, costs, and risks when looking to track progress following a digital transformation plan.

Digital initiatives are the top priority for 2019, according to Gartner's latest CIO survey. Only 4% of organizations have no digital initiative at all, which signals a shift from digital as an option to digital as a mainstream platform.

To accomplish this, you will need a set of key performance indicators (KPIs) to measure digital transformation progress. Work to keep it simple when it comes to measuring and monitoring digital KPIs. Pick four to eight KPIs to measure and report on to monitor progress toward your objective. Make sure all departments align on a single point of truth at the start of an initiative, and throughout the transformation process.

When defining KPIs, look at the specifics of your organization. KPIs should not come from a pre-set list —instead, they should be customized to fit your specific objectives. That said, we have a few guidelines or questions for you to consider. (To the right)

It is important to note that not all initiatives may have an absolute goal of 100%. Take this into consideration when tracking toward objectives. For example, a KPI may be to increase digital touchpoints across your outbound prospecting cadence by 50%. You may not want to exceed 50% because of the known effectiveness of direct mail or phone outreach in your specific target market.

Validating Results

WHAT KPIS AND METRIC ARE YOU MEASURING TO TRACK RESULTS?

WHERE ARE WE TODAY? DID WE ESTABLISH A BENCHMARK TO MEASURE PROGRESS?

WHAT IS OUR TARGET GOAL? WAS IT CLEARLY DEFINED WITHIN OUR OBJECTIVES?

HOW DO THE KPIS ALIGN TO OUR DESIRED BUSINESS OUTCOME/BENEFIT?

WHAT IS OUR BALANCE POINT?

Applying Your Digital Transformation Process to Sales Challenges

Now that we've covered the essential components, let's dive deeper into the steps you can take as you aim for a complete digital sales transformation.

05
ENABLEMENT

Align with revenue teams to improve messaging, customer intimacy, alignment & overall collaboration & growth.

CONTINUOUS IMPROVEMENT

04
QUALITY

Leverage CRM data to create coaching plans based on sentiment analysis & key words to improve messaging & performance.

03
VOLUME

Motivate teams to work toward defined targets. Push for an increase in activity volume and track it against transparent KPIs & goals.

02
ENGAGEMENT

Prescribe activities, prioritize leads & reduce keystrokes to enable reps to better engage with more prospects.

01
PROCESS

Define your lead to revenue process. Establish & leverage CRM to support visibility across the sales process.

DATA

Set a firm foundation to build upon. Create & maintain a single source of accurate, meaningful data.

Discovering Digital Transformation

Data

The Foundation of Digital Sales Transformation

Data management and governance need to be at the foundation of your digital sales transformation program. The ability to rely on the data in your CRM for all business decisions will provide you with actionable insights. A central point of truth is essential for both finding alignment and tracking progress. Your key objectives should focus on setting up a firm data foundation to build on. Creating and maintaining a single source of accurate, meaningful data leads to higher quality sales engagement and data-driven decision making.

Conduct a CRM audit to identify where duplicate or inaccurate data exists, and use data enrichment providers to fill in the gaps. The goal is to get to a point where you have a continuous process maintaining a clean database. Check for duplicates, implement automation, and optimize your CRM one to two times a year to ensure your revenue organization has meaningful data to leverage with prospects and customers. This will enable automation and engagement tools to support personalization at scale for both digital and account-based campaigns.

01. How would you rate your organization on the following:

Accuracy: Low Accuracy (1) High Accuracy (10)

| 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |

Usability: Low Data (1) High Data (10)

| 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |

Security: At Risk (1) Secure (10)

| 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |

02. How do you measure sales effectiveness?

_____

_____

_____

03. What metrics would give leadership better visibility?

_____

_____

_____

04. Have you ever done an a CRM audit to analyze the health of your CRM data?

_____

_____

_____

05. What data points would be critical to your organization to improve:

Sales engagement _____

Sales coaching _____

Sales enablement _____

06. What data points are critical to create the customer experience you are looking to build?

_____

_____

_____

07. What are the critical data points that must be captured pre-sale / post-sale?

_____

_____

_____

08. During critical handoffs, what are the data points required and wanted from each department?

_____

_____

_____

09. What data is sales solely responsible for capturing and maintaining?

_____

_____

_____

10. What data are you currently entering manually but need / want to automate?

_____

_____

_____

11. Where does your data live and where are you creating reports?

_____

_____

_____

12. Are our current data management or enrichment tools meeting our needs?

_____

_____

_____

Discovery Questions

WHAT ARE YOUR OBJECTIVES RELATED TO DATA?

_____

_____

WHAT KPIS DO YOU CURRENTLY HAVE IN PLACE?

_____

_____

WHO AT YOUR ORGANIZATION IS RESPONSIBLE / IMPACTED?

_____

_____

_____

WHAT TECHNOLOGY DO YOU CURRENTLY USE?

_____

_____

BASED ON YOUR OBJECTIVES, WHAT ARE THE EXPECTED RESULTS?

_____

_____

_____

Sales Process

The Customer Journey from Lead to Revenue

Defining your lead to revenue process is the most critical piece of a digital sales transformation. It should be a representation of your actual sales process. Your objective should be to establish customer lifecycle stages to track progress and KPIs across the sales process. Start with identifying the critical steps in your sales cycle. Then work with sales operations and your entire revenue organization to decide on Service Level Agreement (SLAs) between marketing, sales, and customer success. Ensure that the human steps of your process can be completed manually before diving too deep into automation and tools. The process needs to be clear, and all members of the team understand the process and expected outcomes.

Your CRM and marketing automation platforms are excellent tools to automate the handoff process between teams. Automation will improve your lead to revenue process, maximize sales effectiveness, and strengthen customer intimacy.

01. How simple is your sales process: Transactional (1) Complex (10)

1   2   3   4   5   6   7   8   9   10

02. How does your organization develop process? What steps do you take?

_____

_____

_____

03. How do you receive process feedback?

_____

_____

04. Is your customer journey clearly documented and shared with all members of your organization?

◯ Yes   ◯ No   ◯ Unsure

05. Is your sales process documented and shared with all members of your organization?

◯ Yes   ◯ No   ◯ Unsure

07. Are you able to measure lead and opportunity velocity at each stage of your sales process?

◯ Yes   ◯ No   ◯ Unsure

08. Is your current sales process defined within your CRM?

◯ Yes   ◯ No   ◯ Somewhat   ◯ Unsure

09. Are you able to currently measure revenue efficiency?

Sales Efficiency = (revenue / sales cost) x 100

_____

_____

10. What level of automation and intelligence is applied to your sales process for these roles:

○	○	○	○	○
Manual	Simple Automation	Complex Automation	Machine Learning	AI

B. SDR

C. AE

11. Where does your team spend the majority of their time each day?

_____

_____

12. How many steps do you currently have within your sales process?

_____

_____

NOTES

_____

_____

_____

_____

Discovery Questions

WHAT ARE YOUR OBJECTIVES RELATED TO YOUR SALES PROCESS?

_____

_____

WHAT KPIS DO YOU CURRENTLY HAVE IN PLACE?

_____

_____

WHO AT YOUR ORGANIZATION IS RESPONSIBLE / IMPACTED?

_____

_____

WHAT TECHNOLOGY DO YOU CURRENTLY USE?

_____

_____

BASED ON YOUR OBJECTIVES, WHAT ARE THE EXPECTED RESULTS?

_____

_____

Sales Engagement

Multi-Channel Communication for Increased Engagement

Once you have a better understanding of your lead to revenue process, identify areas for improvement for sales engagement at each stage of the sales cycle. Work with your sales managers and get feedback from your sales reps on the front lines to audit potential bottlenecks and gaps. Their insights will help you decide what engagement tools and processes can be implemented or optimized. Without enterprise solutions such as computer telephony integration (CTI) or sales engagement platforms, sales teams end up spending loads of time doing inefficient, non-sales-related activities for most of their working day.

> **On average, sales reps spend a mere 34% of their time actually selling.**

-Salesforce State of Sales Report 2018.

Investing in sales engagement and CTI solutions can help your sales reps prioritize incoming calls, respond to calls faster, and mitigate time spent in leaving (or responding to) voicemail. These solutions will result in accurate CRM data entry and enhance the overall customer experience because reps will have the resources to meet the needs of B2B buyers today.

01. What communication channels are currently used in your sales process?

02. What communication channels have the best conversion rate at your company?

03. Which channels are leading indicators of engaged buyers?

04. What does your buyer expect / demand?

05. What channels do your buyers prefer to engage on?

06. What data points will drive the desired outcomes?

07. What is the role that you have defined for your seller? Prescribed, transactional, relationship-driven, consultative?

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08. Does this role align with your buyers expectations?

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09. Are you satisfied with the current outputs of each role today? Where would an increase in output make a difference?

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10. Do any challenges fall into bigger, organizational challenges?

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11. How do channels shift across the sales process?

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Discovery Questions

WHAT ARE YOUR OBJECTIVES RELATED TO SALES ENGAGEMENT?

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WHAT KPIS DO YOU CURRENTLY HAVE IN PLACE?

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WHO AT YOUR ORGANIZATION IS RESPONSIBLE / IMPACTED?

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WHAT TECHNOLOGY DO YOU CURRENTLY USE?

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BASED ON YOUR OBJECTIVES, WHAT ARE THE EXPECTED RESULTS?

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Quantitative Sales Performance

Motivate Your Team To Increase Benchmarks

As sales leaders, one of your biggest responsibilities is to motivate your reps. Your reps are your biggest asset. You can empower your teams to succeed by driving them to perform their best every day with continuous training and coaching. Capturing key call metrics will give your team insights into process improvements and coaching opportunities that can increase sales even further. You need visibility into sales reps performance data such as call volume and speed-to-lead metrics to understand where your reps need the most training and coaching.

Hubspot research found that continuous training can result in net sales increase by as much as 50% per rep.

With the right add-on tool and processes, CRM platforms can become a tremendously useful tool for sales managers to evaluate these types of metrics. Consider developing some friendly competition and incentives to motivate your reps further to hit and continuously surpass their goals. There are sales performance platforms out there that easily allow you to gamify the sales process to keep your reps engaged and motivated.

01. **What KPIs do you use to measure performance?**

02. **Out of these KPIs what data points are manually entered by the rep?**

03. **What data points are you missing from your reports?**

04. **What level of trust do you have in the accuracy of your activity metrics?**

Sales leadership: Low Trust (1) High Trust (10)

1	2	3	4	5	6	7	8	9	10

Account Executive

1	2	3	4	5	6	7	8	9	10

SDR

1	2	3	4	5	6	7	8	9	10

05. **Can you associate sales activities to outcomes?**

06. Do you have prospecting benchmarks related to:

Number of outbound calls?

Number of emails sent?

Number of meetings booked?

Number of outbound call connects?

Number of LinkedIn connects?

Number of meetings attended?

07. Are you measuring how many touch points it takes to connect with a prospect?

08. What metrics help improve your pipeline reporting and estimating?

09. How do you share these metrics with your organization and team?

10. Do you use a sales scorecard?

Discovery Questions

WHAT ARE YOUR OBJECTIVES RELATED TO SALES PERFORMANCE?

WHAT KPIS DO YOU CURRENTLY HAVE IN PLACE?

WHO AT YOUR ORGANIZATION IS RESPONSIBLE / IMPACTED?

WHAT TECHNOLOGY DO YOU CURRENTLY USE?

BASED ON YOUR OBJECTIVES, WHAT ARE THE EXPECTED RESULTS?

Qualitative Sales Performance + Coaching

Improve the Quality of Sales Engagement

In addition to measuring key call metrics, sales leaders can benefit from implementing processes to support sales development further and improve the quality of sales engagement. Shifting to a digital sales model allows you to measure qualitative aspects of engagement — which is hard to measure in an outside or field sales model.

Standardizing conversation outcomes, tracking talk time, and analyzing conversation quality using Call Recording Analysis technology gives your sales management team a data set for which to measure what is hard to quantify. Conversation outcomes provide you with actionable insights that can help tailor coaching to each individual's reps way of selling. Measuring talk time and conversation outcomes make it possible to identify talk trends to accelerate opportunities and prescribe next steps.

01. Do you capture call recordings in CRM?

02. Do you analyze call recordings?

03. Do you leverage live coaching?

04. Do you measure talk time?

05. How much time does it currently take to coach one call?

06. Do your managers and reps understand the value of coaching?

07. Do you have a process for measuring & reviewing call quality with your reps?

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08. Do your reps grade their own calls?

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09. Do you have a standard scorecard associated to your coaching initiatives?

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10. Can you measure and score conversation quality in CRM?

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11. Do you currently have standard conversation outcomes for each stage of the customer journey set up in CRM?

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12. Do you save examples of good and bad calls for training purposes?

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Discovery Questions

WHAT ARE YOUR OBJECTIVES RELATED TO QUALITY ENGAGEMENT?

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WHAT KPIS DO YOU CURRENTLY HAVE IN PLACE?

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WHO AT YOUR ORGANIZATION IS RESPONSIBLE / IMPACTED?

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WHAT TECHNOLOGY DO YOU CURRENTLY USE?

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BASED ON YOUR OBJECTIVES, WHAT ARE THE EXPECTED RESULTS?

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Sales Enablement

Delivering Actionable Sales Content + Resources

The final piece in transforming your sales team into a modern, digital-first sales organization is to arm sales reps with thought leadership and product knowledge. It could be challenging for sales reps to keep up with recently published marketing content. Consider creating or adopting a sales enablement tool that serves as an internal content library for your customer-facing reps.

Collaboration and alignment with marketing, product, and customer success will play a critical role in making sure your sales force aligns outreach to the brand and product strategy. In addition to providing sales collateral, guided training and discussions should also be regular events to help reps become your product and industry experts. Keeping your sales team up-to-date with what messages work and don't work will prove extremely valuable. Whether you train them on general sales strategies or industry best practices, it's time well-spent.

01. Does your sales team have access to a sales content library?

02. Does Marketing provide campaign updates for Sales?

03. Does Marketing and Sales collaborate on outreach templates and messaging?

04. Do your reps have an internal point-of-contact for questions and help?

05. Do your reps have the flexibility to customize touchpoints on the fly?

06. Are your reps skillful in personalizing outreach on their own?

07. Does your organization provide in-depth internal product training to everyone in your organization?

Discovery Questions

WHAT ARE YOUR OBJECTIVES RELATED TO SALES ENABLEMENT?

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WHAT KPIS DO YOU CURRENTLY HAVE IN PLACE?

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WHO AT YOUR ORGANIZATION IS RESPONSIBLE / IMPACTED?

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WHAT TECHNOLOGY DO YOU CURRENTLY USE?

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BASED ON YOUR OBJECTIVES, WHAT ARE THE EXPECTED RESULTS?

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Continuous Improvement in Digital Sales Transformation

B2B sales leaders are constantly challenged to keep up with the pace of digital innovation in B2B markets. New and improved digital buying experiences are getting the attention of your B2B buyers, and attention is what will influence the next wave of B2B sales trends and best practices. The role of the sales professional has shifted from someone who can memorize call scripts, send templated emails, and rattle off price sheets to one that must be engaged in their buyer's journey. Today's sales professionals must first focus on being helpful, trusted, solution-oriented, and most importantly, human.

Digital transformation is about empowering this cultural shift with data and tools to support it. As organizations, we must embark on this journey with a mindset for continuous improvement and iteration with a focus first on our people and culture, and then on results. As advancements like automation and artificial intelligence begin to remove some of the burdens from sales professionals, we as leaders can focus on the parts that matter most—developing our people for this modern landscape.

- Set clearly defined objectives.

- Engage multiple layers and departments within your organization.

- Work diligently to develop your people.

- Document, simplify and align around your process.

- Focus on incremental growth.

- Measure and analyze your KPIs.

- Optimize and iterate on each component of your digital sales transformation.

Developing people and processes while maintaining an ever-changing relationship with data and tools requires innovation, flexibility, and a mindset for continual improvement. This is where the rubber meets the road in any digital transformation. This is also why we have broken this workbook out into transformational steps for your organization. The journey ahead can be an arduous one. While the pace of change across our industries will likely never slow, it is our commitment to growth and adaptation that will help build successful organizations now and into the future.

We challenge you to hold onto this workbook and revisit these final questions as you continue to grow and develop your sales organization.

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Discovery Questions

HOW ARE YOU DRIVING CHANGE IN YOUR ORGANIZATION?

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WHERE ARE YOU IN YOUR DIGITAL TRANSFORMATION JOURNEY?

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WHAT CAN YOU DO TO BETTER ENABLE YOUR REPS AND IMPROVE THEIR DAILY WORKFLOW?

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WHAT ARE THE BIGGEST GAPS IN YOUR SALES EXPERIENCE?

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WHAT KPIS HAVE PROVEN TO MATTER MOST AND HOW HAS THAT CHANGED MY DECISION MAKING?

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ABOUT US

We are here to change the way businesses communicate.
We believe in the power of the human voice to solve the world's most complex business problems. Our technology optimizes the power of CRM to accelerate the building of relationships, drive efficiency, and increase revenues.

DialSource is a leading software-as-a-service (SaaS) technology company that enables organizations to gain back hours of productivity by communicating more efficiently with prospects and customers. DialSource Denali transforms your CRM into an engagement platform and improves sales and service communications. Keep your teams focused on selling, simplify your tech stack, and maintain all your data securely with Denali for Salesforce or Microsoft Dynamics. DialSource powers millions of interactions at the world's leading brands including ADP, Waste Management, Paychex, Madison Square Garden, and VSP.

Learn more about DialSource Denali for Salesforce and Microsoft Dynamics at **www.DialSource.com**.