THE SMB's GUIDE TO OPTIMIZING SALES & TECHNOLOGY

Canadian Professional Sales Association
L'association canadienne des professionnels de la vente
Since/Depuis 1874

By The Canadian Professional Sales Association

How do you know if sales productivity is an issue for your organization?

Built within the foundation of any proper business strategy, the relationship between sales and technology needs to be constructed with an overarching goal of increasing profit on revenue generating activities. However, balancing sales and technology, while maintaining efficiencies and reducing redundancies elsewhere, is often extremely challenging.

There are several tell-tale signs that your company is experiencing strained productivity in sales. Close rates may take too long, or processes may be inefficient. Perhaps poor conversion rates are bumping up your cost per acquisition, while administrative tasks and order processing are consuming time you could have spent selling. No matter your scenario, finding that sweet spot between sales and technology is integral to empowering your sales team toward success, rather than hindering them.

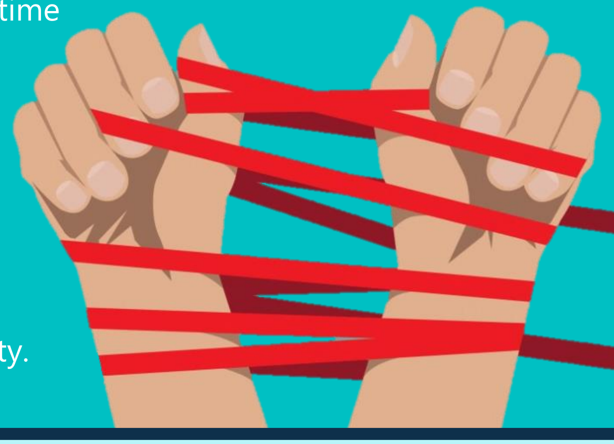
Use this guide to identify the 6 key areas in which technology and people solutions can be used as tools to balance and optimize sales, as you strive to boost your bottom line.

6 Areas for Sales & Technology Optimization

1) ADMINISTRATIVE DUTIES

Performance Gap

When your sales team is overwhelmed with administrative tasks, the time that should be dedicated to prospecting, nurturing leads and closing sales becomes overshadowed. Trying to keep track of emails and voicemail messages, in addition to other administrative tasks throughout the day, distracts your team from optimizing their time effectively. As a result, analyzing employee or company performance gaps in administrative work is the first step towards increasing sales productivity.



Up to
55%
of a salesperson's average day is spent on non-selling activities[1]

Technology Solutions

Programs that allow sales managers to automate sales funnel management are ideal for tracking tasks, as they're built to manage schedules and oversee deals from lead to close. In addition to these tools, basic systems such as the Outlook Scheduling Assistant will enable your team to keep their schedule and appointments up-to-date, so they can minimize the time it takes to get organized and maximize their time with the customer. Remember, to get the most out of your investment, regardless of what software you select, invest in training so that your team can manoeuvre through the software to the best of their abilities.

Solution #1

The Salesforce cloud is an enterprise customer relationship management solution with capabilities that span sales management, marketing automation, partner relationship management and customer service. Using the Salesforce lead management system, teams can make smarter administrative decisions about where to invest their time, by tracking leads from click to close, while continually optimizing opportunities across every channel.

salesforce

Solution #2

Infusionsoft is a customer management software that combines marketing automation and e-commerce into one system. With Infusionsoft's opportunity management function, sales teams can simplify their sales cycle by managing their pipeline and track deals to forecast future opportunities. With the addition of such functions, sales reps can spend less time working deals and more time closing, boosting administrative efficiency.

Infusionsoft.

www.cpsa.com
1-888-267-2772 | 416-408-2685

Solution #3

Microsoft Dynamics is a customer relationship management solution that drives sales productivity and marketing effectiveness through social insights, business intelligence, and campaign management in the cloud, on-premises, or with a hybrid combination. It helps automate administrative tasks such as real-time funnel tracking and revenue reporting, that can extend beyond the office through their mobile CRM apps. These apps enable you to manage your customer relationships on your mobile devices, along with tools that integrate data and reporting from social media directly into your CRM application.

Dynamics is proven to increase[2]...

Sales up to: **29%**

Productivity up to: **34%**

Accuracy up to: **42%**

Microsoft Dynamics CRM

People Solutions

In organizations with smaller budgets, or that only need a subset of CRM functionality, people can be a valuable complement to technology.

If possible and appropriate, designate an administrative professional to alleviate tasks from your sales team's workload. This will give your team the opportunity to focus on prospecting and selling, while their broad organizational tasks are covered.

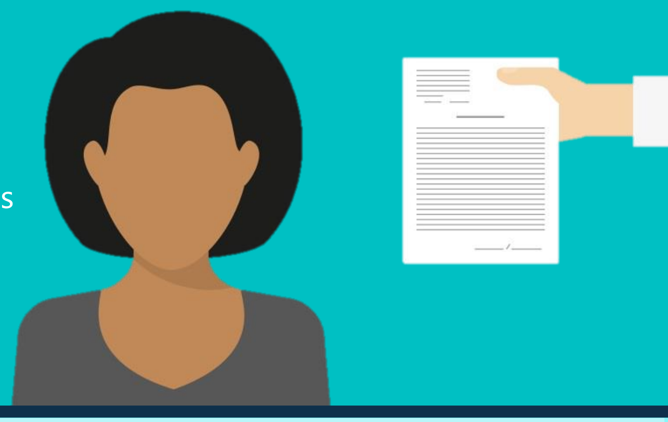
What to Avoid

While technology can be a useful addition to your current system, it is important to avoid over-complicating the sales and management process. When learning about your chosen software, identify the aspects that will be helpful to your process and eliminate the ones that will be a hindrance to your operations.

2) PROSPECT ALLOCATION & PRIORITIZATION

Performance Gap

After the prioritization and classification of prospects is complete, accounts can be distributed to the appropriate representative for follow-up and eventual closure. By randomly allocating leads or prospects to the members of your sales team, you disjoint the sales process, rather than streamlining it. Although the initial prospect allocation time can be lengthy, by qualifying and allocating leads based on analytics, setting out a standard process will increase productivity and save time in the long run.



Technology Solutions

Marketing automation refers to the use of software that allows users to automate their marketing processes, which includes customer segmentation, customer data integration, and campaign management. Lead scoring is a key component of marketing automation. It ranks prospects based on their perceived value and determines how salespeople can engage and at what level of priority. By automating lead scoring based on predetermined rules and tracked activities such as, clicks, page views or other interactions, you will be able to better evaluate your lead's interest before assigning them to a sales rep. When this type of marketing data is centralized and easily accessible to sales people, they can use it to nurture prospects with highly personalized and useful content.

Solution #1

Microsoft Dynamics Marketing enables your marketing team to plan, execute, and measure campaigns across channels, from start to finish, to bring your marketing vision to life. You can engage customers, build your sales pipeline, integrate planning, budgeting, and tracking across all channels, collaborate and manage processes and workflows across your team—from a single platform.

Microsoft Dynamics

Solution #2

Pardot is designed to allow organizations to automate and streamline their prospecting strategies, as well as keep their sales pipelines fully stocked with a steady flow of high-quality leads. This lead generation tool gives users the ability to sort through unique lists of prospects, so that communication can be personalized and targeted in a way that generates high-quality leads right from the get-go.

salesforce pardot

www.cpsa.com
1-888-267-2772 | 416-408-2685

Solution #3

ActiveCampaign is an email marketing system, which allows users to automate their sales process, so they can provide the most time effective and user friendly experience. In an effort to increase the inflow of leads and close deals faster, users can apply ActiveCampaign's marketing and sales automation capabilities. Its advanced segmentation and targeting abilities are powerful tools when aiming to maximize your response and prioritize your sales focus based on user data. Once contacts have been loaded into ActiveCampaign, users can segment contacts into individual lists, and assign basic or advanced logic such as location, past purchases or history. Using segmentation tools allow you to better target your email marketing messages.

ActiveCampaign >

People Solutions

Although integrating lead and prospecting solutions is an effective way of streamlining your sales strategy, it is also useful for organizations to educate their sales teams on how to track their return on time invested (ROTI). This type of tracking can be used in order to see the return in revenue based on time spent by type of lead, account, or channel. Additionally, it is important to keep your sales team accountable for understanding standard marketing data and how it integrates with their lead nurturing activities on a basic and day-to-day level. Actions like reviewing communication history, interactions, and preferences can provide insights into user behaviours, interests and help guide talking points in sales calls.

What to Avoid

As with the integration of any new software, proper training is essential to its success. Ultimately, if salespeople know how to use their software, and it is built into the sales process, adoption rates will be greater.

Additionally, endeavour to reduce overlap in lead and prospect assignment, by making selection criteria exclusive. While lead scoring is a helpful tool, it should not be solely relied upon when deciding which accounts to pursue and whom they will be assigned to.

3) INTERNAL COMMUNICATIONS

Performance Gap

As the saying goes, 'a chain is only as strong as its weakest link'. Regardless of how well you technically integrate your sales process, the need for proper internal communication and collaboration amongst team members is essential. In order to reduce the performance gap and make each department collaborate as effectively as possible, aim to develop a cross-functional strategy that organizes communications in an easily accessible way for all parties, through the use of internal file sharing and collaborative technologies.

Technology Solutions

When integrated correctly, there are a variety of technological solutions that can assist teams in creating a stronger and more unified level of communication. Effective technologies available to better adopt departmental communications include, sharing team goals across software dashboards, wikis, forums, intranets, shared calendars through programs such as the Outlook Calendar, and the use of platforms that designate tasks and roles to team members. Tools like these make it easier to distribute tasks and foster trust with transparency. Video conferencing is also helpful when attempting to ensure colleagues stay in touch remotely.

Solution #1

Yammer is a cloud-based internal collaboration tool. When salespeople update activities, contacts, and opportunities on the go, they and their team get real-time insight and increase productivity while away from the office. Yammer provides an in-context social feed within a flexible workspace for teams to find related documents, conversations and people. Posting a question to Yammer during a meeting can result in an instant response and customer resolution. All this also helps organizations stay current on the sales activities of their people.

yammer
The Enterprise Social Network

Solution #2

SMART™ Board Interactive Whiteboard System allows users to work together and interact with files and applications in real time. A projector connected to the computer displays the desktop image on the interactive whiteboard, which is controlled by touch. The SMART™ Board has many features that enable users to share information, capture brainstorming results and distribute action items instantly. Multi-touch support also means two people can write, erase and manipulate objects simultaneously.

SMART Board™
interactive whiteboard

www.cpsa.com
1-888-267-2772 | 416-408-2685

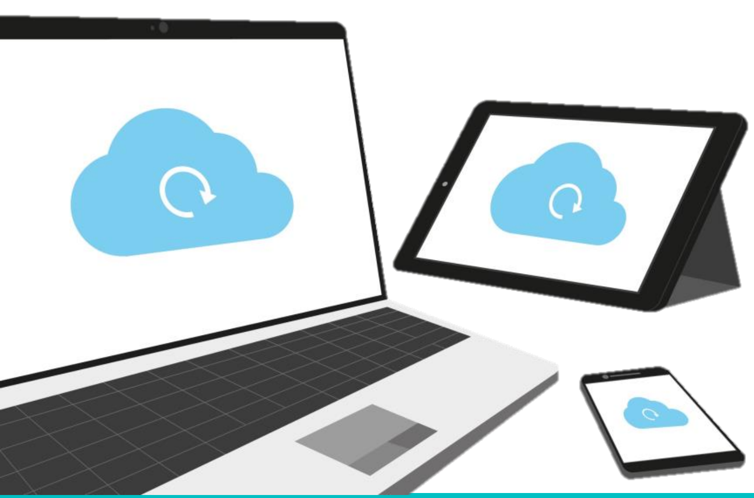
Solution #3

Skype for Business provides a powerful and simple way to interact with colleagues, partners, and contacts. Salespeople can quickly find subject matter experts or decision-makers and bring them into meetings to answer questions and get deals closed. Users see presence icons within CRM and can initiate an interaction with just one click. Skype for Business blends the familiar Skype interface with enterprise-grade Lync capabilities for a powerful communications tool.

Skype for Business

People Solutions

Software aside, internal communications are often most successful when they come from a more personable level. Creating a culture of collaboration over competition is paramount because it establishes a sense of comradery and trust, which encourages team members from all departments to work towards a common goal. Try to implement adaptable communication techniques that can be adjusted to different personalities and communication styles.



What to Avoid

With so many technologies at our finger tips, it can be easy to let digital communication replace face-to-face conversations. Success is best accomplished through team interaction, so it's critical that the appropriate balance is found between technology and human based connections. While email, forums, shared calendars, CRM tools and dashboards are beneficial, none should entirely replace real and raw interaction.

4) PROSPECT COMMUNICATIONS

Performance Gap

Given the majority of prospect communication is conducted on the fly; many gaps in performance can occur with mishandled messaging. While you can't always rely on a script for every conversation and interaction, by creating consistent message points that can be utilized regardless of the communication channel, it allows you to build a strategy that maintains branding and allows for a personalized and flexible sales approach. Keeping your message constant helps convey to your prospect or client that you are a reliable, knowledgeable and trustworthy.

Technology Solutions

From webcasting tools, to video conferencing solutions, solving the performance gap within your prospect communications can often be rectified through connective technologies. Online conferencing tools for example, eliminate the cost of business travel and can expedite meetings, while call recording software can be used to recall important information as needed or to train sales teams. In addition to these technologies, digital proposal, contract and invoice sign-off programs make closing deals a faster and simpler process for both parties. Through electronic signature software's like DocuSign, companies can reduce document turnaround time by as much as 90%[3]. By closing more deals faster, gaps in performance caused by long closing processes can be alleviated.

Solution #1

RingCentral Office is an advanced call management system that records client calls or meetings held over phone or via email. RingCentral stores calls for playback and can be download by need, which allows sales teams to review calls for individual and group training purposes, as well as keep important conference material or verbal agreements on hand for replay. RingCentral's recordings can be gathered instantly after recording and can be distributed to users as needed.

Solution #2

GoToMeeting is an online meeting, desktop sharing, and video conferencing software that enables groups of up to 25 to meet through the computer, or over the phone in real time. Users can see who is talking with speaker identification, share their screen, record meeting sessions, share keyboard and mouse control and even draw or highlight on screen. GoToMeeting can also be used as an online administration centre to allocate seats and monitor usage.

Solution #3

DocuSign is a digital transaction management software that allows users to easily sign documents electronically and send forms for electronic signature in minutes. DocuSign's eSignature solution is safe, secure and legally binding and is accessible from your computer or mobile device. With the click of a button, users can sign and send documents, as well as gain instant visibility into their status.

DocuSign®

People Solutions

Technical solutions to your communication inconsistencies should begin with an audit of the current process, which will work to seek, identify and remove weaknesses, while highlighting how you can strengthen your process to benefit both you and your prospect. Therefore, when endeavouring to resolve the performance gaps in your prospect communications, it is important to start from the base of the issue; training. Salespeople should be trained appropriately, so that they can easily identify the stage of the sales process their prospect is in at any given time.

Call shadowing is a useful tool when working to strengthen the individual skills on your team, in addition to setting a call standard across the board. Phone scripts are also useful when teaching salespeople how to react in various call scenarios. To ensure reps are communicating to the principles set by your organization, sales managers can also create templates for emails, proposals and presentations, to help keep their messaging clear, cohesive and on-brand.

What to Avoid

Rather than creating a large list of templates for every foreseeable conversation your sales team may encounter, build a condensed template list that covers the most typical sales scenarios and most frequently encountered objections. By creating fewer and more common templates, not only will your team begin to build strength and confidence in their conversations, but searching for the documents they need at a moment's notice will be much easier.

5) CLIENT AND REP RELATIONSHIP

Performance Gap

Solid relationships are built on a foundation of trust, and this is especially true in sales. Shallow relationships between sales reps and their clients translate to transactional sales. By developing deeper connections, salespeople will create greater opportunities for collaboration in the future.

Technology Solutions

When building relationships with new prospects, gathering sufficient information on their background and potential product needs is essential. Not only does researching clients allow you to nurture relationships, but it builds the potential beyond what you could otherwise accomplish by blindly contacting potential leads. Consequently, by making client research a part of your basic sales preparation, you will begin to open deeper relationships built on open communication and trust. To uncover this information, there are a variety of powerful solutions that can be easily integrated into the sales process, which can reveal details such as product interests, demographics and changes in business that can help you strategize the best approach.

Solution #1

Google Alerts is a content detection and notification service offered by Google, that sends emails to the user when it finds new results such as web pages, newspaper articles, or blogs that match the user's search term. In order to gain visibility on potential prospects, users can set up alerts for their dream clients or hot leads, so they can monitor news and announcements that could act as a gateway for establishing contact.

Google

Solution #2

LinkedIn is an online social networking website, which acts as a prime source for discovering sales leads and connecting with potential business partners on a new level. Through LinkedIn people search, you can find contacts based on specific characteristics relevant to your business. Additionally, LinkedIn's company search function is a useful tool when tracking down leads within companies you have not interacted with in the past. By researching these new prospects, you can uncover the unique identifiers that connect you, so you can reach out with purpose.

LinkedIn

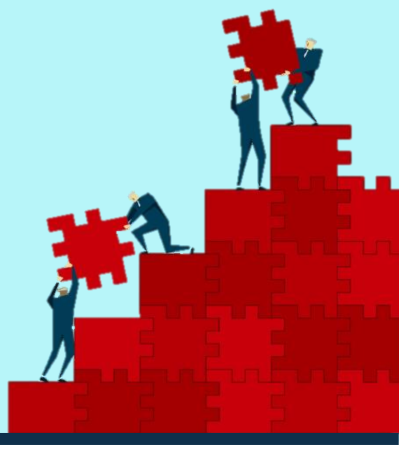
Solution #3

Lead Forensics is a cutting edge technology solution that enables you to maximize the value of every visitor to your website, by identifying prospects that have already showed interest in your company in the form of website visits.

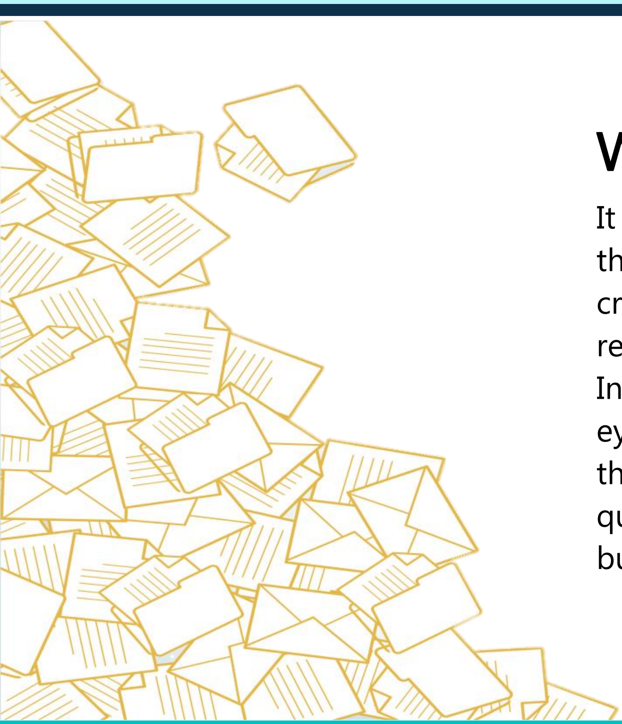
Through Lead Forensics online tracking and reporting solution, users can access real time intelligence about their prospects, including which companies visited, when they visited, what they searched for, and the pages they viewed. This information is incredibly powerful as it helps prioritize new and quality sales leads quickly, in addition to cross selling opportunities with existing clients.

LEAD FORENSICS

People Solutions



Success in sales relies on a perfect combination of research, questions, customized solutions and interaction. In order to achieve this, salespeople should be trained on the consultative sales process, meaning each salesperson's primary focus should be listening and delivering value to the client. Work on training your team towards a goal of understanding each customer's unique set of needs, so they can become trusted advisors.



What to Avoid

It is important that users of client tracking functionalities don't abuse the software to over analyze prospects. Not only can excess knowledge create an unsettling feeling for the prospect, but it will strain the relationship, break the delicate trust barrier and hinder any future sales. Instead, be transparent by indicating that you've been keeping a close eye on their industry trends or even that you noticed someone from their company recently visited and you wanted to address any questions they may have had. This shows a keen interest in their business, but doesn't overstep boundaries.

6) THE SALES PROCESS

Performance Gap

Regardless of what you determine is the best sales strategy and process for your team and your organization as a whole; remember the key to continued success is setting an initial performance standard that breeds success from the prospecting stage all the way to close. A lack of strategy at any stage in the sales cycle can be detrimental, not only to the deal you're working on, but to future relationships as well. Always deliver consistency and check in to make sure best practices are being upheld.

Technology Solutions

Process mapping helps define what an organization is currently undertaking, who is responsible, the standard in which the process should be completed, as well as how to determine the success of the endeavor as a whole. Additional methods of closing the performance gap during the sales process include the organization of data into an internal user flow chart and the integration of sales management technologies.

Solution #1

Professional Selling Online takes the CPSA's best-selling sales training program into an online training course you can complete over an 8 week period with complete flexibility to organize your learning around your own personal schedule. With a focus on instilling the Consultative Selling process, Professional Selling Online leaves participants understanding they key aspects of effective selling, so they can own the sales process.

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Solution #2

ProcessMaker is an open source business process management (BPM) or workflow software application that assists organizations with designing, automating and deploying business processes or workflows of various kinds. ProcessMaker workflow software features an extensive toolbox, which lets users create digital forms and map out fully functioning workflows. The software is web based and can also interact with other applications such as ERP, business intelligence, CRM and document management.

ProcessMaker®
Workflow Simplified

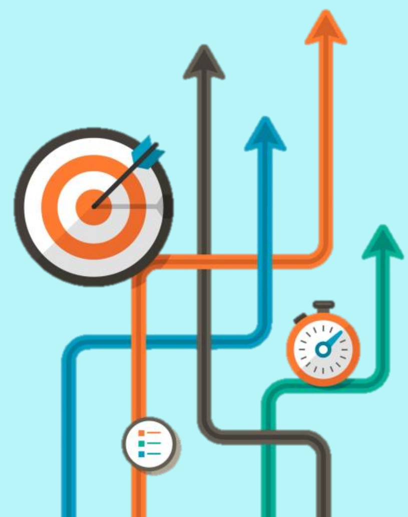
Solution #3

With a Microsoft Sales Productivity Solution, salespeople gain the support of their data and their entire team while they are on the road. Key insights aren't lost, questions are answered immediately, and data is entered accurately. Microsoft Dynamics CRM Online and Office 365 deliver an intuitive, process-driven user experience that guides salespeople through the tasks and information they need to stay focused on closing deals. With Microsoft Outlook, Skype for Business, SharePoint, and Yammer all part of the CRM experience, the people and information you need are only a click away. Sales reps are no longer flipping from application to application to perform all of their sales activities. All of their important information is presented contextually in a simple user experience.

Microsoft

People Solutions

In order for sales performance to function across the board, sales managers should strive to onboard efficiently and thoughtfully, in order to ensure sales reps not only acknowledge your process standards, but also have an understanding of how to navigate them. This includes ensuring your sales team is comfortable utilizing the software solutions that your team depends on for continued success. To successfully onboard new reps to your team, training manuals, one-on-one and group training sessions, shadowing and regular progress meetings should become a standard practice.



What to Avoid

Although intimidating, user interface and process flow should be simple enough to follow intuitively, and ultimately allow participants to track their performance against pre-determined standards. Proper training is a sound investment when implementing such software, making unawareness your biggest detriment.

CONTINUING THE OPTIMIZATION OF SALES AND TECHNOLOGY

The key to efficiency in sales relies on the implementation of solid processes that have solutions rooted in both technological and people based concepts. Remember, the question of productivity may not always lie within technical or human inefficiencies as individual issues; rather it relies on finding the optimal balance between both, that empowers your sales team to reach continued success overtime. By working to decrease redundancies and smooth otherwise lengthy manual processes, you will be able to streamline, simplify and have more impact with less effort.

Resources

[1] Ellwood, Mark. "How Sales Reps Spend Their Time" Pace Productivity Inc.

[2] Salesforce. "Quickbooks CRM: How Salesforce and Accounting Software Can Increase Sales" Salesforce.com.

[3] DocuSign. DocuSign eSignature Solution. Docusign.com.

Over 14,000 Professionals Have Benefited from the CPSA's Professional Development Programs

1. Recruit and assess the right sales professional the first time.

CPSA provides you with tools like psychometric assessments to alleviate these human resource challenges. Our wide range of employee assessments help organizations reduce turnover, select the right candidate for their team, and increase productivity and retention.

2. Train and coach your team to increase sales productivity.

Invest in your most valuable asset through ongoing sales training with the Canadian Professional Sales Association (CPSA). We can help you better understand, service, and communicate with clients and prospects in order to develop more profitable, long-term relationships.

3. Certify your sales professionals to gain a competitive edge.

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4. Develop your sales team on an ongoing basis to stay current and strengthen their skills.

Demonstrate your commitment to sales excellence by continuing to provide development opportunities for your sales professionals that keep them at the top of their game professional.

To learn more about CPSA's sales training or other products mentioned above, contact us at:
SalesSuccess@cpsa.com or visit www.cpsa.com/training.

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Our travel, insurance, auto, and business benefit programs provide savings that will fall right to your bottom line. Over 70% of CPSA members save more than $1500/year in travel-related costs alone! Explore our member benefit programs.

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Sign up to start saving!

Travel Save Pro>>

Save up to 60% off corporate hotel rates at over 1,000 hotels across Canada, up to 30% off car rentals, 25% off at Park'N Fly, and discounts with VIA Rail.

Auto Save Pro>>

Receive fuel discounts of up to 3 cents off per litre, consistent car rental discounts of up to 30% off and discounts on other services.

Insurance Save Pro>>

We've partnered with Manulife Financial, Cornerstone and Reliable Life to offer members between 20% - 40% off typical insurance premiums on travel, home, auto, business, disability, health, and dental.

Business Save Pro>>

Save on business services and lifestyle services. Receive up to 35% off on shipping, 20% off professional development, and up to 15% off services with DocuSign and Lead Forensics.

The way people buy has changed…

9 of 10

business buyers say they'll find you when they are ready to buy

IDG Enterprise, "Lead Generation Marketing Trends", 2013, link

57%

Customers are 57% through the buying process before they talk to you

CEB, "The New High Performer Playbook", 2012, link

…shouldn't you change the way you sell?

3% vs. 67%

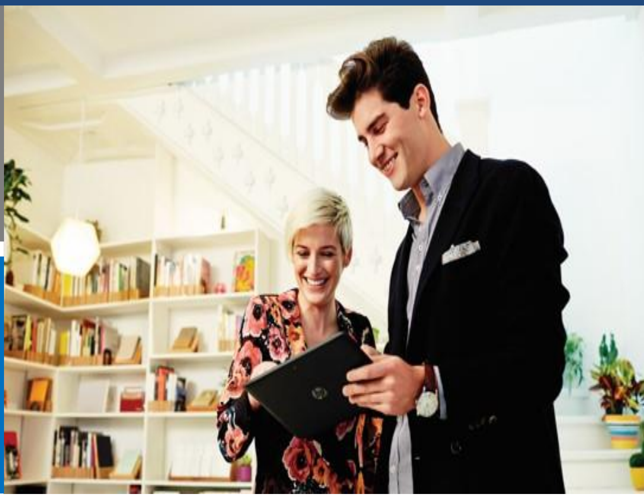
3% of cold calls vs. 67% of second-degree LinkedIn referrals result in appointments

Microsoft, "The Dynamic Sales Team", 2013, link

73%

of sales people using social media to sell outperform those who don't

A Sales Guy Consulting and Social Centered Selling, "Social Media and Sales Quota", 2012, link



Microsoft Sales Productivity Solution

Microsoft provides a single user experience with Microsoft Dynamics CRM Online and its interoperability with Microsoft Office 365 and Power BI for Office 365.

Sales reps can go to one place for all of their tasks, like viewing sales leads, researching companies, finding social connections, communicating with prospects, reviewing sales insights, and creating sales proposals.

Eliminate application-flipping by giving sales reps contextual information in a simple user experience.

- ✓ Outcome-driven user experience drives adoption
- ✓ Business and social data power insights
- ✓ Easy collaboration wherever you are

CRM Online Free Trial Experience the difference yourself with a 30 day free trial.

See it in Action with our guided demo

Learn more at www.microsoft.ca/sales

Microsoft

About the Authors

Holly Speers

Holly Speers is the Senior Coordinator of Marketing & Communications at the CPSA. Through the management of e-mail communications, e-newsletters and whitepaper publications, she uses her strong background in writing and passion for marketing to continually advance CPSA resources, offering new and exciting ways for sales professionals to stay at the top.

Sharlene Fernandes

Sharlene Fernandes is the Professional Development Manager at the CPSA. She manages the operations and marketing of the CPSA's training, development, and certification programs. She is an avid writer and editor, who is constantly looking for new ways to highlight sales and business issues that impact today's sales professionals.

About The Canadian Professional Sales Association (CPSA)

The CPSA is Canada's leader in developing and serving sales professionals. We are dedicated to enhancing the effectiveness, efficiency, and professionalism within the sales community. Since 1874, our 27, 000 members have been selling more, and saving more. Become a member today, and enjoy special travel and business discounts, as well as access to exclusive sales and business resources.

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