

eBook



Maximising Seller Effectiveness

Turn your Salesforce data into revenue intelligence and guide sellers on their path to deal success



Salesforce's CRM is the world leading CRM platform, used by more than 150,000 businesses to nurture prospects, drive the sales process, close deals and manage existing customers. It's a fantastic tool, when used to its full potential. However, a large proportion of businesses are yet to capitalise on all the benefits the application brings.

With the rise in digital selling, the volume of data resources available to sales teams continues to increase – and the CRM should be the foundation for an intelligence driven sales process. Maximising the value of the CRM investment needs to be a priority.

In this eBook, we discuss why companies are yet to realise their CRM dreams and outline the value of AI and behavioural science techniques to:

- Unlock hidden revenue intelligence from your existing CRM data
- Alleviate sales team pressure of CRM by automating data capture
- Motivate sales reps and help them increase close rates
- Improve pipeline visibility and achieve forecast accuracy of 95%
- Hit your ideal customer profile (ICP) for long-term value
- Maximise ROI on the CRM investment



Why sellers do not value their CRM.

Too many companies are failing to maximise ROI from their CRM investment. This has been acknowledged for years, as salespeople have always questioned the value of filling in pages of data within their CRM.

However, the increasing impact on the bottom line has been starkly highlighted by recent shifts in buyer and sales team behaviour. With the support of revenue leaders, CRM data can help sellers drive high-value daily activity and contribute to their overall productivity and success.

Digital technology dominates both buying and selling behavior.

Buyers are undertaking far more research up front, which changes their expectations of the sales process. Sales teams now have access to a phenomenal depth of information relating to prospects and the ability to interact via video has transformed the number of conversations possible each day.

With purchasers now making decisions by committee, salespeople cannot rely on one-to-one relationships. Yet as collaboration has become ever more important, remote working has hindered the use of prospect information and exacerbated protectionist attitudes, as salespeople keep their valuable contacts list close at hand.



Not planning for change.



No clear view of every angle.



Poor quality data.



Insufficient staff training.



No incentives for employee usage.



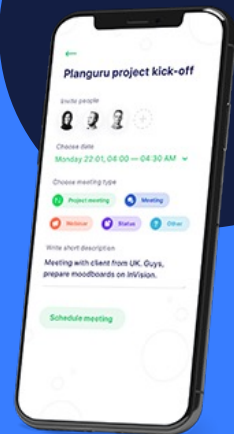
Impact of poor data.

Businesses across every sales landscape are missing out on revenue opportunities because they don't have access to data insight at every stage of their selling journey. Why? This can be due to a simple lack of enthusiasm, incentive or training when it comes to salespeople inputting data into the CRM.

Often individuals only load information about prospective deals once they have a 'sure thing'. Valuable information is kept secret in spreadsheets and Google Docs. The business has no knowledge of the 80% of prospects that were not closed; no insight into the steps – good or bad – taken to engage the prospect during the sales process; and no chance to ensure prospects are being nurtured in the right way.

If salespeople can't see the value of updating Salesforce, and don't have the time to do so, the information will be incomplete and the CRM will fail to provide the insight required to create an intelligence driven sales model. The reliance on salespeople to input more and more information into the CRM needs to change.

“Companies are potentially losing business by not tracking sales throughout every stage of the process and not following the right steps at the right time.”



Transform your CRM to add value to your sellers.

Businesses need to be respectful of the quality and timeliness of the information demands placed on salespeople. What's more, they need to ensure that information delivers real value to the sales process and, as a result, creates a truly motivated and effective sales team.



Improve customer retention.



Increase business revenue.



Refine communications.



Improve work efficiency.



Gain deeper data insights.



Enhance customer service.

Automating data entry to alleviate the sales team burden.

With the depth of data now created throughout the digital selling process, salespeople have never had more power to prioritise and focus. But they need support.

Growing numbers of businesses are exploring technology to minimise the data challenges created by often over-specified CRM solutions. For example, capturing information including account, industry, SIC code etc, and preloading it into the CRM will reduce some of the sales team burden.

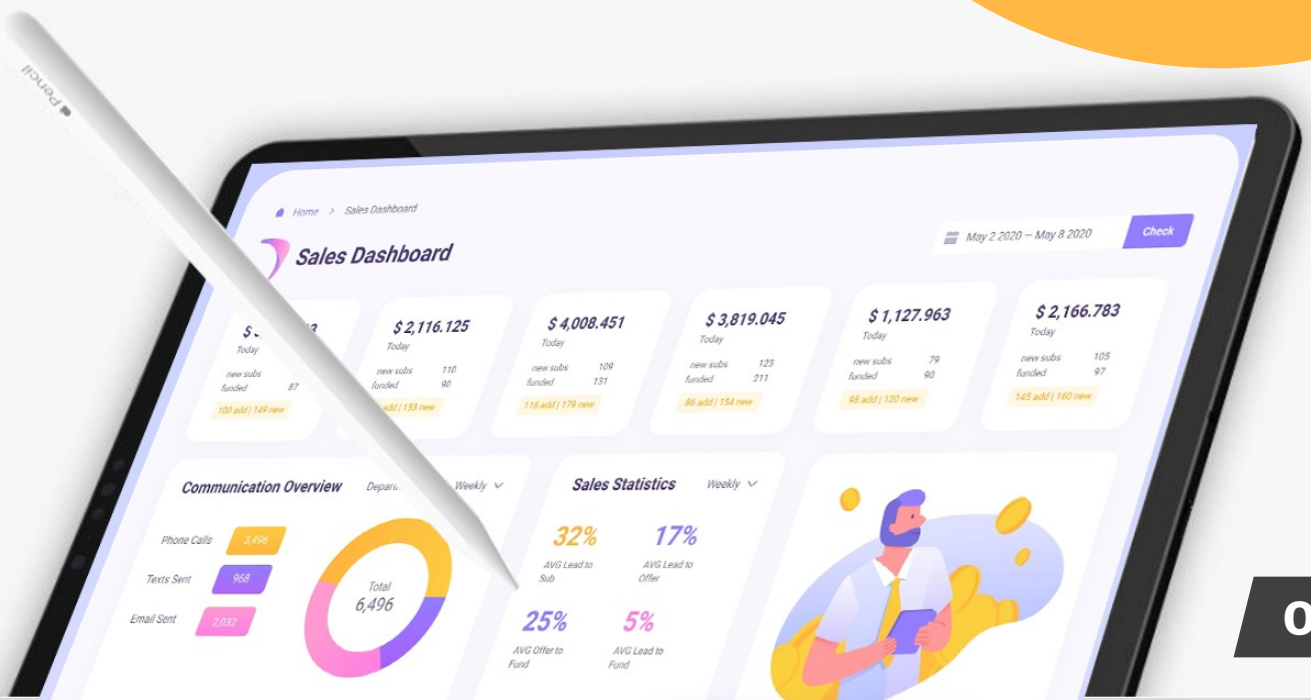


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Revenue intelligence and activity intelligence tools capture and record video connections, not only linking the record to the CRM but also automatically generating useful insight – including call attendees, length of meeting, and even sentiment – that takes the onus off the salesperson and provides even more valuable information.

Using AI to then ensure the sales team can rapidly understand the implications of this ever-expanding data resource is hugely valuable. Which activities have been successful? Does that sales process transfer effectively to other clients? Is the use of specific competitor names a possible red flag to closing the deal?

“Rather than relying on salespeople for information, providing them with all the insight required to make their individual sales business the best it can be, will transform their perception of data value.”



Unlocking hidden insight already within the CRM.

The data already within a business's CRM is better than most revenue leaders would believe. AI can access new layers of useful, hidden information within Salesforce to accurately predict deals and improve forecasting.

Combined with behavioural science techniques, it can also rapidly identify successful behaviours across the entire sales team. By using gamification and nudge techniques, a business can propagate these optimal behaviours across the team to accelerate change. For example, by reminding individuals to focus on the ICP, a company can minimise the chance of individuals reverting to type or being distracted by what appears to be a great opportunity.

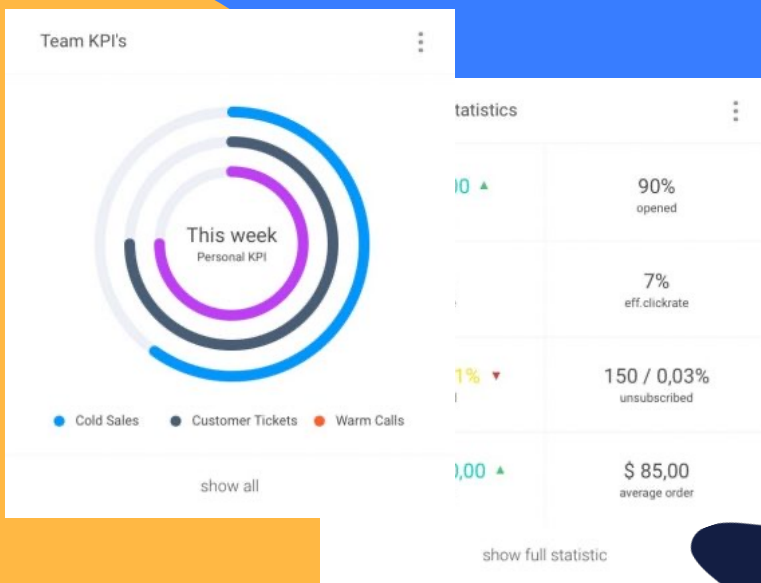
This technology can also provide a far more nuanced insight into the performance of less successful individuals. Who is failing to master the new behaviours – and in which areas? By extending the focus beyond a sales only approach and tracking the entire revenue process, a business can rapidly highlight problems – such as individuals straying away from the ICP and those failing to qualify out potentially toxic deals.

Using gamification-driven data capture, AI-led interpretation and constantly optimised behavioural changes means the business is learning and improving constantly.



Demonstrating a value exchange through gamification and nudge techniques.

Sending salespeople on a Salesforce training course is not going to make a difference to a team that's already time-poor and under increasing pressure to sell in a rocky economy: learning how to update the information is not the problem. Nor is it likely that linking the compensation plan to inputting data will work – indeed it can have the opposite effect and further demotivate staff.



The key is to acknowledge that the CRM has been designed by management for management, with a focus on collecting information to support organisational processes and improve forecasting. CRM is not delivering tangible benefits to each individual salesperson, and this needs to change.

Good data can ensure poor prospects are qualified out sooner, minimising time wasters and allowing a salesperson to focus on the best opportunities. With the right model, salespeople should directly benefit from CRM, which will encourage them to supplement it with even more data. The earlier in the process the data is shared, the more help and support salespeople should receive.

Using gamification to deliver marginal gains.

Only once salespeople are seeing the value of CRM data will they be encouraged to input more. This new behaviour can then be reinforced through gamification and by nudging change through rewards, such as promoting success throughout the sales process, not just celebrating closing the deal. Celebrate behaviours such as adding a competitor to the opportunity, introducing product expertise earlier in the sale process or adding a decision maker.

Who is onboarding fastest? Who is routinely collecting the depth of data required to improve forecasting? Who is adhering most closely to the Ideal (ICP)? Gamification can transform the speed with which new salespeople become confident and productive.

Gamification is about encouraging the behaviours that deliver marginal gains – gains which add up to significant revenue and a rapid ROI.



Fun learning environment.



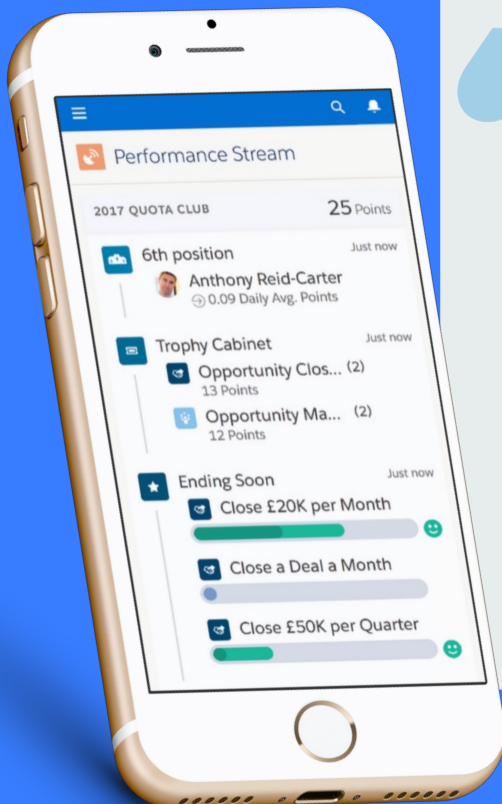
Increases in motivation.



Improved user experience.



Faster staff onboarding.



"We identified an issue with converting leads and engaging with prospects throughout the sales cycle. Integrating revenue intelligence into our CRM has been vital in tackling this; we have been able to pinpoint key behaviours that correlate with greater sales success. In 2021, the average number of these behaviours performed by our salespeople was 3,000.

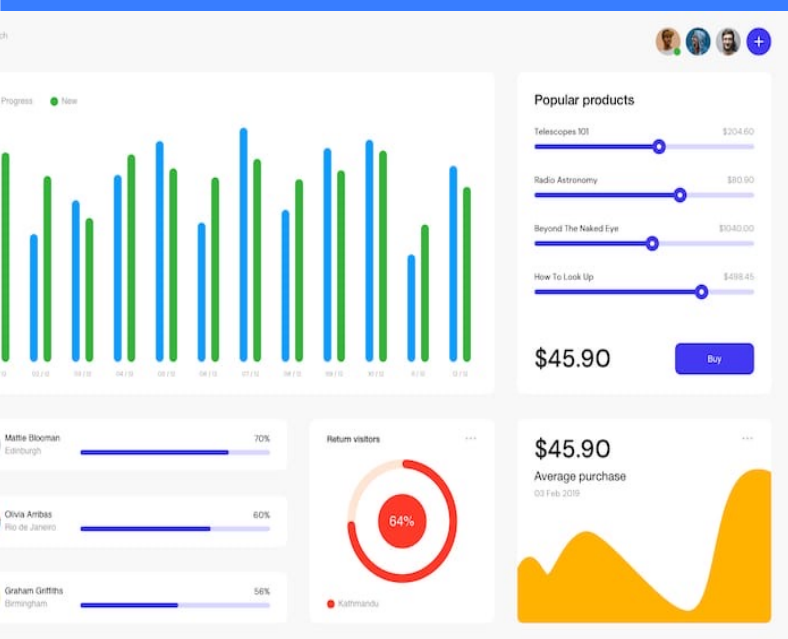
Those who performed more than the average achieved at least 93 per cent of their sales target. This is a clear correlation between the behaviours identified by the revenue intelligence platform and the upskilling of our team to close more deals."

- Schuyler Michael, Head of Sales Operations, EC.

Empowering Sales managers to nurture staff.

Sales managers need to shift their focus from negotiating deals to managing salespeople – and that means ensuring everyone has the support needed to be productive and valuable. How many of the senior team have the skills now required in a digitally enabled B2B buying journey?

How many are confident in their solution selling capability, with strong product knowledge and solution design as well as account-planning skills, cited by **85% of sales leaders** as key to B2B revenue growth? Sales managers must be empowered to learn from the intelligence within their CRM to ensure their teams are confident to do the same.



It is not just salespeople who need support to prioritise the ICP. Sales managers need help in nurturing their sales talent and ensuring they are encouraged to concentrate on the top tier.



Increase in employee motivation.



Better retention & less resignations.



Improved staff loyalty & engagement.

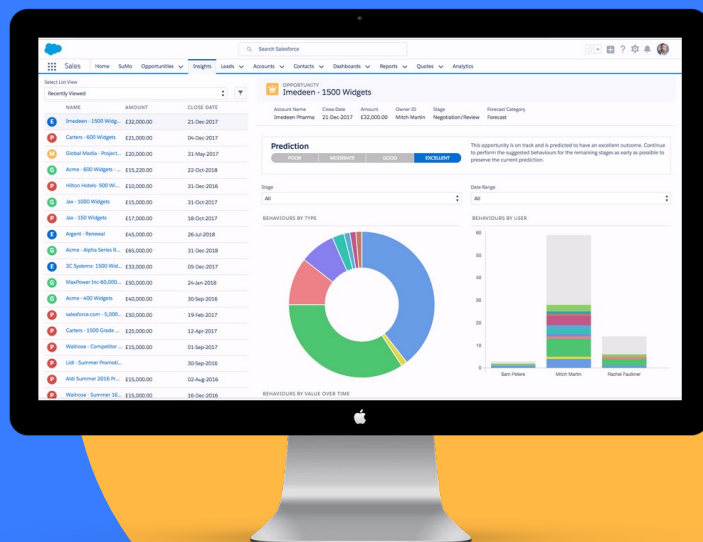
“In order to grow, it’s not uncommon for businesses to crank the handle faster. While short-term gains are possible, there’s a matter of sustainable scale to consider and importantly, the wellbeing of colleagues. Our strategy was to find a platform of tools we could use to support sales teams and existing procedures. One method we were already exploring was the possibility of harnessing AI and behavioural science techniques to identify and promote successful behaviours within teams. We had a technical discussion with the Cloudapps team to see what they could do for us and came away excited at the prospect of working together.”

- David Turner, Chief Marketing Officer,
IRIS Software Group

Conclusion – closing the deal.

The need to drive CRM value for salespeople is nothing new, but the acceleration of digital selling and remote working has contributed to the widespread demotivation of sales teams globally.. Businesses need urgently to turn the CRM investment around and that can only be achieved if the system delivers tangible benefits to the people using it: the sales team. That's where Cloudapps can help.

By changing the approach and using AI and behavioural science to both understand and reinforce success, the entire sales model improves. Salespeople are more motivated. The business has not only complete visibility of the pipeline but up to 95% forecast accuracy of current opportunities. Plus, not only will the close rates increase, but those deals hit the ICP, which will ensure they deliver long term value to the business.



Transform your CRM into a full-funnel revenue intelligence engine with Cloudapps:



Predict deal outcomes.



Identify opportunities for new revenue.



Improve forecast accuracy.



Increase sales productivity & performance.

