

## Five Factors for Inside Sales Success

B2B sales is undergoing a transformation. Big ticket sales traditionally sold via field sales teams are moving to Inside Sales. This trend from field to inside sales is unstoppable - it's growing 15 times faster than the traditional field sales according to a study by InsideSales.com.

Changes in customer buying behaviours are driving this change. Availability of online information means customers are more informed and already through the buying process before they engage with a sales person.


The case for inside sales teams is compelling – they are less expensive and easier to measure and scale. Yet some companies seem to be succeeding well and others failing. This article looks at approaches companies can take to increase Inside Sales success.

The Inside Sales model requires more discipline, focus and rigor than field sales. It needs less friction. Done well it feels like a well-oiled industrial machine. Done badly it feel likes mayhem.

The key is to create an Inside Sales Playbook, which should be the code for your reps success every day. Consider the following five elements when creating your Inside Sales Playbook.

1. Messaging
2. Sales Process
3. Talent
4. Metrics
5. Technology

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### Insight in brief

B2B sales are undergoing a transformation. Sales, which were traditionally sold via Field Sales teams, are moving to Inside Sales.

The case for inside sales teams is compelling – they are less expensive, and easier to measure and scale. Yet some companies seem to be succeeding well and others failing. The key is to create an Inside Sales Playbook.

### Insight in Action

When creating your Inside Sales Playbook consider the following 5 elements:

1. Ensure the sales

## **1. Ensure the sales team has the marketing messages right**

This is the foundation of any good Inside Sales Playbook. Remember the sales team doesn't have the same opportunities as field sales to build rapport with the customer. Understand your customers pain points and equip your team to deliver your message in 30 seconds or less.

Build buyer personas in the marketing process and ensure your inside sales reps understand these deeply. Equip them with questions that move opportunities forward. Make sure they are clear on your key measurable value, features and differentiators from the competition.

Get the right lead nurturing tactics in place for different stages of the sales funnel. Figure out what content and tools like whitepapers, online demos, videos, webinars, ROI calculators etc. are needed to help them deliver the right message at the right time.

## **2. Get everybody using the same winning sales process**

Ensure the hand-off process is clear and well documented between inside sales and marketing. Like a good relay team, the baton must be passed securely.

Good sales performers figure out what it takes to get customers to buy. Initially, they use trial and error to work out the sequences of emails, demos, who to call, referral approaches and sales tools. Then they settle on their own 'best practice'. Find what your best reps do (the top 20%) and codify it into best practice.

Make sure that you have clear definitions. For example – what does a qualified lead actually mean? Does that mean it has been qualified by marketing or is it a sales team qualified lead? Ensure that your sales process is totally integrated and updated with your CRM system.

## **3. Hire the right talent and on-board them religiously**

Based on experience (of good and bad reps), pick the top profile characteristics and behaviours needed in a successful rep. Keep it to less than 5 that are specific to your company, (e.g. competitive and focused on quota

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2. Get everybody using the same winning sales process
3. Hire the right talent and on-board them religiously
4. Figure out the right metrics to make your business successful
5. Get the right technology and tools and ensure the whole team uses them

attainment, ability to learn quickly, etc.)

Build discipline into your hiring process e.g. an integrated set of questions and activities, which test for the profile you specify. Reference check thoroughly (at least 5). Use psychometrics to gain additional insights into candidate fit.

Once you've selected a sales rep make sure they really understand customer pain – rotate new reps through support for a number of days as part of their onboarding. Use the Playbook as your tool to ensure reps know, understand and are equipped to succeed. Support them with good quality coaching that can guide them towards high performance.

Think through your compensation package carefully.

Keep it:

- Simple
- Variable e.g. based on the behaviours you want to incentivize
- Motivational e.g. pay close to the behaviours and metrics you want

#### **4. Figure out the right metrics to make your business successful**

Figure out the number of calls reps should be making per day. Is it 40, 50 or 60? Understand your key metrics, goals and identify best practices followed by the whole team. Some reps may take 7 calls to close a sale, others 4. Figure out why. Work to establish the right quotas for your team.

Seek commitment from the team on metrics for qualified opportunities, sales closed, upsells made etc. Use external performance benchmarks to keep on track? Think about fun competitions to engage your team.

Publish leading and lagging metrics on a clearly visible dashboard to ensure a competitive environment: e.g. key sales won, quota made, time to close, pipeline value and actual versus forecast. Analyse the key data – what sales tools are being used most? Where are clients spending time on your website? Where are the bottlenecks?

Get the right atmosphere and fast track the development of high performance with experienced managers. Ensure reasonable manager/rep ratios in small groups focused on particular market segments.

#### **5. Get the right technology and tools**

Work towards consistency in what you do and how you do it. Use technology to automate routine tasks and eliminate unproductive time.

Make sure all contributors have access and know how to use the right tools and training. Ensure you have:

- A team-wide CRM system with the right application of sales process and workflows, pipeline values and forecasting
- A good telephony system, which tracks phone performance
- Prospect intelligence tools, like Hoovers and One Source

Consider using technology tools, like Hubspot, to help reps focus on opportunities that are 'most likely to buy' based on scoring mechanisms, which track digital activity on your website, email open rates, social look ups, YouTube channel, Twitter activity etc.