Inside Sales Success:
A Guide for Global Leaders
by Anneke Seley and the Reality Works Group team

(510) 749-9073
http://realityworksgroup.com
info@realityworksgroup.com
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Introduction: **Shifts in the Sales Profession**

The sales profession is not what it was 10 years ago, or even five years ago. The globalization of the economy, rapid and pervasive advancements in technology, rising sales costs, and shifts in buyer behavior have had a dramatic influence on the way sales organizations operate. These shifts have challenged long-held assumptions and misconceptions about what it takes to achieve sales success.

For example, consider the perceived value of field sales reps versus inside sales reps. Sales leaders have traditionally looked to their top performing field reps to leverage a mix of strong people skills, competitive drive, and a well-stocked list of contacts to make sales magic happen quarter after quarter. As any sales leader can attest, however, the superstar rep is difficult to find and expensive to retain. Even with the backing of great training and the proper mix of incentives and compensation, a strong field sales rep is no silver bullet.

The bottom line is that pervasive changes in buying and selling behaviors have forced us to rethink the way we build and operate winning sales organizations. The winning formula now involves adopting and implementing new practices and tools, specializing and segmenting your sales force, and automating many of your sales processes – all of which you can accomplish best by building a powerhouse inside sales team. That’s why we’re seeing a growing dependence on inside sales to carry revenue. According to a joint study conducted by InsideSales.com and InfoUSA, **the inside sales model is growing 15 times faster than the traditional sales model** (“Remote Sales Trends”).

**Remote Sales Industry Study**

![Remote Sales Industry Study Graph](image-url)
“As head of strategy and business development for inside sales in my division, I feel it’s important to learn about inside sales structures and best practices not only from inside sales leaders outside our company, but also from my colleagues around the globe within our own company. We meet virtually monthly, but we also aim to meet at least once yearly face-to-face to discuss everything from leadership training to technologies to social selling support to recruiting.”

– Erik Hammar, Global Head of Direct Inside Sales, Thomson Reuters, Financial & Risk Division

Inside sales teams are not only helping companies transform the way they sell; they are also adding millions in incremental and sustainable revenue to the top line of global businesses. Inside reps can help you engage more buyers, increase chances of winning more deals, and accelerate sales cycles. They can also help you create more predictable revenue streams and forecast revenue with greater accuracy. And all at a far lower cost than what it takes to run a typical field-sales organization.

There’s still a place for the field sales superstar in the sales profession. But by shifting opportunities to a high-level inside sales organization, best-performing companies focus their most senior (and expensive) salespeople on negotiating and closing only the largest, most resource-intensive opportunities without missing out on smaller, higher -volume, or easier-to-close business. Inside sales assures these opportunities are covered through a disciplined and consistent process of engagement and follow up. That means your company leaves less money on the table and delivers a better customer experience.

The implications of developing a highly effective inside sales team are enormous for global businesses. In fact, some companies consider their inside sales strategy and execution a major competitive advantage. This eBook will illustrate the many ways in which an inside sales group can make your organization quantitative, predictable, measureable, and scalable. You’ll learn how to identify trends, make better business predictions, and set better expectations with your board of directors and shareholders (to the delight of CFOs, CEOs, and managing directors everywhere). Most important, you’ll find out how you can replicate the success of top performing inside sales teams that are achieving a competitive advantage in today’s technology-enabled, data, and metrics-driven selling environment.

Continue reading, forward this eBook to the members of your executive team, and begin your implementation plan for building a top performing inside sales organization – before losing business to your competitors.
Part I: Adapting to Today’s Buying and Selling Cycle

How can we blend the “art” of selling (the skills we use to connect with today’s buyers) with “science” (revenue delivery that’s measurable, predictable, scalable and sustainable)? These chapters review the organizational structures, roles, and responsibilities that have emerged to make both sellers and buyers more effective and efficient and outline two key concepts that a growing number of global companies have embraced – most often driven and proven successful by their inside sales organizations.
Chapter One: Specialized Sales Roles

To engage effectively with your customers at all stages of their buying cycle, you need to segment your sales force. Quota-carrying field reps, for example, will naturally gravitate to large, high-revenue opportunities that are likely to close soon – as they should. Often, however, this leaves customers that are too small, too remote, or too early in their decision process out in the cold. Inside sales teams give you the coverage you need for all kinds of buyers at all stages of buying – and even before a buying cycle begins – that could otherwise be vulnerable to the influence of your competition.

As you map roles, responsibilities, and compensation for your sales team, keep the perspective of your customer in mind and you’ll be rewarded with your customer’s attention, trust, and ongoing business.

A coordinated, cross-departmental approach, starting with education from marketing and sales development (lead qualification) can help shape the buyer’s vision. Customer service and other groups dedicated to customers are also an integral part of selling, because the customer’s experience determines long-term allegiance and propensity to buy additional products or renew services or subscriptions.

CSO Insights’ survey shows that the majority of sales executives recognize the revenue potential and competitive advantage of specialized roles within inside sales. Over 58% of their survey respondents have outbound inside sales functions and over 55% use inside sales to sell to existing customers. But there is still room for improvement in many companies to add inside sales functions or optimize and grow existing ones.
Simplified Buyer’s Steps

**Ideation and Research**

- Consider and Identify Initiatives
- Define Budget and Requirements
- Research and Evaluate Options
- Select Vendor

**Ready to Buy**

- Approve and Sign Contract
- Implement and Measure Results
- Renew or Buy More

**Marketing and Lead Qualification**

- Lead Qualification and Sales

**Sales and Legal**

**Sales and Customer Service**

**Team Approach to Buyer - Collaborate - Communicate - Well-Defined Two Way Hand-offs**

**Integrated Cross-Functional Engagement**

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info@realityworksgroup.com

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Sales Development Team
Engages and educates early-stage buyers, nurtures buyers that are not yet ready to buy, qualifies prospects, and builds a pipeline of qualified leads for quota-carrying sales reps. Sometimes reports to marketing rather than sales. Many sales development teams contribute large gains in productivity and results by allowing quota carrying inside sales reps to concentrate on buyers who are ready to buy. Companies have seen millions of dollars in incremental revenue as a result of creating sales development teams.

Also known as: Lead Generation, Lead Qualification, Lead Development, Business Development

Old-school name: Telemarketing

Roles within Sales Development Teams:

- **Inbound.** Responds to Web leads/search, inbound marketing response (phone and online).
- **Social Listening.** Watches social media for potential buyers.
- **Chat.** Interacts real time online with online prospects (e.g. visiting web site).
- **Outbound.** Uses phone, email, and/or social media channels to engage, educate and prospect.

Understanding Specialized Sales Roles in Segmented Sales Forces

What’s the difference between an inside sales team, a sales development team, and a hybrid sales team? Although there are no universally recognized naming conventions, here are some general guidelines.
Inside Sales Team
Uses phone, email, social media to close business. Organized by territory, carries a sales quota, has a commission plan.

Also known as: Corporate Sales, Account Management, Virtual Sales, Remote Sales

Old-school name: Telesales

Roles within Inside Sales Teams:

• New Business. Sells to new customers that are comfortable buying online or by phone, or that are not cost-effectively handled by field sales.
• Client Success. Sells additional products to existing customers, renews services, and sells to new departments with customer accounts.

Hybrid Sales Team
A cross between inside sales and field sales. Uses mostly phone, email, and social media to close business but travels to visit prospects whenever appropriate and necessary to close business (e.g. whenever the opportunity is large or the customer is strategic and the cost of travel is justified).

New concept: In some organizations, inside sales and field sales are combined and referred to simply as “sales.”

Field Sales Team
Sells mostly in person. Typically closes complex deals and handles large, strategic accounts.
Inside Sales Success: A Guide for Global Sales Leaders

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The Buyer’s Journey in Six Stages

Successful sales teams think more about the buyer’s journey than the traditional sales cycle. In other words, it’s all about the buying cycle. Consider what inside sales – along with sales development – can do to enhance the buyer’s journey at various stages.

Stage One: Pre-Awareness
Buyer recognizes there is room for improvement but hasn’t identified a project or initiative yet.

What sales development can do: Ask the right questions and provide the right education to help shape the buyer’s ideas about your solution. Using business intelligence and social connections, suggest new ideas that could help the buyer’s business, share information about best practices or research in the buyer’s industry that could motivate change or make an introduction to a person the buyer perceives as a valuable connection.

Stage Two: Awareness
Buyer starts online searching, research, and engagement with trusted community.

What sales development can do: Continue providing valuable information and contacts without pushy selling. At this stage, the buyer will typically appreciate learning about pertinent online communities and content as well as in-person events that can provide additional perspectives from expert sources and peers.

Stage Three: Consideration
Buyer defines initiatives and requirements, develops funding options.

What sales development can do: Ask qualifying (BANT) questions and bring inside sales into the conversation when customer has been qualified as a buyer. If the buyer is not ready to buy, continues to nurture along with marketing.

Stage Four: Ready to Buy
Buyer asks detailed questions regarding product, competitive advantage, pricing, terms.

What inside sales can do: Address open questions and issues and confirm results needed for customer’s success (along with field sales if selling in team model).

Stage Five: Purchase
Buyer finalizes internal approvals, contracts and schedules delivery or start date.

What inside sales can do: Assist customer in streamlining purchasing process, schedule internal resources to insure a successful project start. New business rep can bring client success rep into the conversation.

Stage Six: Post-Purchase/Re-Purchase
Buyer begins using product.

What inside sales can do: Client success rep stays in contact with customer, addresses open questions and issues, helps track results and experiences, nurtures relationship with customer and understands when it’s valuable to introduce additional products that can help customer’s business – or another business within the customer’s company.
Quick Tips

Create a sales development group. Many sales development teams contribute large gains in productivity and results by focusing on early-stage buyer education, prospecting, and qualification, allowing quota carrying inside sales reps to concentrate on buyers who are ready to buy. This is especially true if you are asking inside sales to generate and qualify early-stage buyers as well as close sales. Companies have seen millions of dollars in incremental revenue as a result of creating sales development teams.

Separate new business and existing customer territories. “Hunters” (those who close net new accounts) and “farmers” (those who renew services or subscriptions, find new opportunities, and sell additional products to existing customers) generally have different skills. Align these reps with territories that suit their strengths, and you’ll see revenue improvements. One technology company selling software as a service (SaaS) saw double-digit percentage improvements in productivity and revenue per headcount within one year by making such territory splits.

Add a human element to your website with chat. Invest in a team to engage prospects on demand when they are visiting your web site. And don’t go with the lowest-skilled, lowest-cost resources that are limited to a script. Remember, this is the first impression your buyer will have of your company. Deals can be lost or won by differentiating with an exceptional customer experience at the earliest stages of the buying cycle.
Chapter Two: How Data and Metrics Impact Productivity

If you want your sales team to consistently hit the numbers each month, your reps have to maintain high levels of productivity. And, for most businesses, inside sales is the area to focus on if you want to push productivity to the next level.

Data-driven inside sales organizations contribute a more predictable number of forecasted opportunities than field sales forces every month. When you track quantitative and qualitative information, you gain better visibility into your funnel and pipeline as well. C-level executives rely on forecasted numbers from the sales team to predict revenue streams, make strategic business budgeting decisions, and set expectations with shareholders.

Inside sales teams typically work with a high volume and a wide variety of information about prospects and customers – both inside and outside the company’s information sources. Increasingly, inside sales teams are using big data and analytics to take advantage of that volume and variety. Specifically, they’re tapping masses of information to understand who is most likely to buy from your company, when they’re most likely to buy, and why. Analytics can help make visible trigger events, buying patterns, products to bundle together or upsell, optimal number of connection attempts, and more for different kinds of buyers. As a result, you can theoretically predict who your most likely next set of customers will be, as well as which existing customers are likely to make repeat purchases and when.

Millions of data points can be processed to predict likely customer acquisition rates and the estimated value of each potential account.

For example, companies are using analytics to attract higher volumes of new customers from outbound contact efforts. Millions of data points can be processed to predict likely customer acquisition rates and the estimated value of each potential new account. The results? Companies are seeing 75% more pipeline growth, tripled sales cycle conversion rates, and doubled win rates.
Instead of playing the numbers game and starting at top of list with a database full of contacts, you’re using technology to create a prioritized list, starting with the people who, according to analytics, are most likely to buy (and buy soonest). The end result is a huge productivity gain; not to mention the end of grueling and inefficient smile-and-dial tactics for inside reps.

Data and metrics can also help managers quickly identify the differences between top performers and middle-of-the-pack reps by comparing measurable KPIs (Key Performance Indicators) and using coaching to raise the overall team’s results. Great managers spend time with their team members; and, given the nature of inside sales, that time doesn’t have to be in person, thanks to technology. Sales leaders are moving away from the “big brother” approach of previous decades and toward the collaborative perspective of “How can I help you succeed?”

“…technology to tell the sales professional whom to contact, when to contact and how to tailor the message for the sales target. The tool integrates with our CRM. It’s gotten our sales teams into more contacts more quickly, increased effectiveness in data capture and increased satisfaction among our sales team. Within 90 days, we have seen a lift in contact rate, activity, sales dollars — and shorter sales cycles.”

– Liz Gelb-O’Connor, VP, Inside Sales Strategy & Growth Initiatives, ADP

### Tracking Key Metrics

Experienced inside sales managers track key metrics to help them assess their progress toward monthly and quarterly revenue results, predict their performance against qualitative and quantitative objectives and measure sales productivity and financial improvements at both organizational and individual rep levels. Some of these metrics include:

1. Sales performance-to-quota
2. Pipeline added
3. Sales activities (calls/emails/social connections/meetings)
4. Win rates
5. Average sales price (ASP)
6. Average sales cycle length
7. Average discount percentage
8. Accuracy of sales forecast
9. Variation in monthly and quarterly sales
10. Revenue per headcount
11. Churn (lost customers)
12. Customer acquisition cost (CAC) and average payback time (APT)

*(Telebusiness Alliance meeting, 2013, Q1)*
Quick Tips

**Track outcomes as well as activities.**
Meaningful inside sales KPIs (Key Performance Indicators) are not just about numbers of contacts and “talk time.” Focus your team on having meaningful conversations and converting prospects into qualified buyers and ultimately customers and repeat customers. With the right set of integrated tools, pre-contact research can turn “cold calling” into relevant messaging. With this approach, you’re measuring success based on outcomes (such as numbers of new opportunities identified and dollars in the forecast) and not just on the number of contacts made per day.

**Prioritize calls and online connection attempts.**
If your data show that new prospects are very likely to buy from you when their business has certain characteristics or a combination of characteristics (for example, multiple international locations, a complex website, a growing number of job posts in a certain function, or a subscription-pricing model) guide your sales team to reach out to companies that fit those criteria first. Reps who ask the right questions can uncover and develop a qualified prospect even before he or she has contacted the sales department.

**Leverage your sales operations team.**
Many companies have trusted sales operations with goal setting, tracking and reporting of data and metrics as well as the evaluation and implementation of sales productivity technologies such as analytics. Sales operations teams can also be entrusted with many executive-level responsibilities such as structuring sales territories, recommending new sales strategies, calculating commissions, and determining the business return on new initiatives.

**Tap integrated, back-office systems.**
For existing customers, integrated back-office systems and analytics can reveal pertinent information about purchase history and timing. Such systems will also help you identify prime opportunities for service or subscription renewals, upgrades, and additional products.
Chapter Three: Embracing Social Selling

If sales reps are going to adapt to the way customers buy, they need to harness the incredible potential of social media and social connections to enhance their sales efforts. These days it’s difficult to find an individual or company that doesn’t maintain some sort of social presence online. Whether it’s a LinkedIn profile, company or personal blog, YouTube channel, Facebook page, or Twitter account, customers and prospects are actively asking questions, broadcasting information, sharing referrals, and voicing their opinions across vast networks online.

Successful inside sales teams around the world are figuring out how to leverage social media to engage with customers in more authentic, timely and relevant ways, and they’re seeing real results. Recent research from Aberdeen shows that social selling organizations had superior results across a number of sales effectiveness measures, such as team and individual quota achievement and renewal rates, compared to companies who do not use social selling approaches (“Social Selling: Leveraging the Power of User-Generated Content to Optimize Sales Results”). Research from IBM found that more than half of global CEOs who participated in their survey expect social channels to be a primary way of engaging customers within five years (“2012 Global CEO Study”).

“When we launched our social selling program, we made the decision to do a pilot with a small, specialized team. We wanted to identify a process, work out the kinks and show a return on investment before unleashing a new way of selling on our global sales force. A year later, we were able to show significant returns on leads generated through social listening and outreach. We have begun rolling out these practices to additional members of our sales team.”

— Natasha Sekkat, Global Director, Inside Sales Centers of Excellence, EMC
What is Social Selling?

Social selling is a highly customer-focused approach to selling, enabled by business intelligence, social media, and social networks, that helps reps better understand their prospects and customers and communicate with them in a more trusted, personal, relevant, and valuable way. Social selling is not just about using social media and networks to close business. In fact, companies seeing the biggest revenue results engage in a combination of social listening, research, education, collaboration, and communications – at all stages of the buying cycle – to generate qualified opportunity and revenue results. In combination with other selling and account management practices, social selling ultimately results in qualified opportunities and sales for the seller and a positive customer experience for the buyer. When customers share those experiences with their own internal and external networks, you gain even greater influence in the market – which translates to new and repeat business opportunities.

Sales leaders who want to pave the path for increased productivity and job satisfaction find that one of social’s greatest attractions is that it turns the traditional cold call into a “warm call.” When your reps integrate the use of social media for both pre-call research and outreach with their existing sales process (phone, email, and even in-person contacts), you can make social selling measurable and scalable.

50% of global CEOs expect social channels to be a primary way of engaging customers within five years.
Quick Tips

Use social to learn about your prospects.
Buyers are informed and empowered, and they’re using social tools to conduct research about products and services they might want to buy. Because many of them are also sharing not only business updates but also personal information about themselves on social channels, there’s no excuse for a lack of insight about what their wants and needs are. Stale, generic sales pitches that fail to take into consideration each customer’s unique business challenges and goals won’t cut it. Aberdeen’s research on Social Selling reports that 70% of Best-in-Class companies (the top 20%) are training the sales team on the use of external social media tools compared to 50% of Industry Average (middle 50%) and 30% of Laggards (bottom 30%) (“Social Selling: Leveraging the Power of User-Generated Content to Optimize Sales Results”).

Integrate social with existing selling processes.
Social can and should be measurable and scalable across your organization and built into your playbook. A large global technology company used a social approach with its inside sales team to sell solutions to clients in a market that has readily embraced social media. A pilot program involving a small team of reps quadrupled order volumes in a single quarter.

Leverage CRM to measure revenue impact of social engagement.
Whenever prospects respond to a link or engage otherwise in social media, that information should be recorded and the prospects should go into your CRM system as leads. Be sure to indicate that these leads came via social media channels or that social was part of the sales cycle. This not only indicates a potential preference of your customer to communicate in social media; it also makes it easier to track your social activity through the pipeline and connect it to a business return. It also gives marketing visibility into what kinds of content, messages and campaigns are resonating with your potential customers.

Encourage inside sales reps to maintain active social media profiles.
When prospects research your company, they often also research individuals. If your reps don’t have a presence online, they’re invisible to prospects. Think of the competitive edge your rep might gain if he or she has a professional, active, and appealing LinkedIn page or other online social presence.
Part II: Empower Inside Sales to Achieve Peak Performance

How can you empower your inside sales team to achieve peak performance? This juggling act requires a combination of the right tools, processes, training and support from other departments. These chapters outline how you can set up your inside sales team to succeed using sales enablement best practices, playbooks, and collaboration with marketing.
Chapter Four: Sales Enablement and the Role of the Sales Playbook

Training – including initial onboarding, ongoing education, and coaching – is a key element of sales enablement. In addition to providing product knowledge and sales skills training, you can help your inside sales team speed up sales cycles, increase opportunities and deal size, and generate predictable revenue by including sales tools and resources and documenting day-to-day responsibilities and actions they need to perform consistently and efficiently.

You can do this in a sales playbook. Whether you’re training new reps, introducing new offerings or giving experienced team members a refresher, playbooks support training in a variety of ways. As good sales leaders are well aware, the faster you onboard new reps and get them up to speed on sales process training, product knowledge, internal systems and resources, and other vital elements, the faster they can start pulling their weight and contributing to top-line revenue. Sales playbooks help in new hire training by answering the question, “What does an inside sales rep need to do every day, how, and in what order to be successful?” For experienced reps, playbooks can be used as a coaching resource within the context of a campaign. They can also be used as continuing education to help reps reach out to or respond intelligently to new buyer needs at different times in their decision cycles. Training and playbooks, when presented together, help reps improve their pre-call research, answers to common objections or questions about competition, as well as manage their own performance against individual improvement or team goals.

“When I built the inside sales team, I wanted to generate sales results quickly. We hired experienced reps, and now that we have measurable success in our first year, we are hiring more junior reps. We have a 4-week training and onboarding program to introduce new recruits to our culture. Our ‘Champions program’ supports these less-costly entry-level sellers with mentors assigned to each of our solutions or product areas, as well as our sales processes, tools and internal systems. In this way, we get them to full on-quota productivity in less than two quarters.”

– Chris York, Director of Inside Sales, Fujitsu
In summary, sales playbooks support a consistent, measurable and scalable selling process that is highly customized to your company and customers. They may include:

- Job descriptions and measurable expectations (KPIs)
- Buyer personas and the buyer’s point of view
- Key questions to ask buyers
- Sales-process steps
- Sample voicemails, emails, social connection invitations, and tweets
- Content that can help buyers in education and decision making
- Answers to common questions or objections
- Competitive information
- Step-by-step instructions for using CRM and other systems and tools

According to research by IDC, a full one-third of potential selling time is wasted due to poor sales enablement. Specifically, IDC reports that reps spend 26% of the week on administrative tasks, 2.3 hours a week looking for marketing materials, 5.8 hours a week searching for customer-related information, and 6.4 hours a week creating presentations (IDC Sales Advisory Service).
This means it’s worth your investment to integrate systems – including training and playbooks modules – with CRM. This way, reps can avoid performing manual, offline research or repeating their data entry (both of which add time to sales cycles). Integrated systems that give your inside team a 360-degree view of customers at the right time in their buying cycle are powerful for enhancing productivity, responsiveness, accuracy, and service. High-volume sales teams can rapidly accelerate revenue growth with real-time, customized information access, pricing, quoting, and sales orders. When activity tracking is easy and fast in CRM systems, reps will be more inclined to enter information that allows them to benchmark themselves versus top performers and best practices.

Including a description of how to use tools for sales-related tasks such as generating quotes, proposals or researching inventory and orders in sales playbooks can help insure consistency and adoption as well as underline how they help sales reps sell. This can address the common challenge of CRM adoption. CSO Insights research reveals that almost one quarter of sales executives surveyed said 75% or fewer of their sales reps use CRM as part of their daily work flow.
Gamify Your Inside Sales Team

Some companies are experimenting with adding a gamification element to CRM and other sales technology usage to make adoption not only less onerous but outright fun. Gamification – using game theory, scenarios and mechanics in a business setting to motivate productive behavior – can also help improve sales metrics that are critical to revenue production but aren’t specifically included in sales commission plans.

“Within one quarter, gamification helped drive a 200% increase in call activity across my sales team, a 50% increase in meetings with targeted prospects and a 100% increase in pipeline.”

– Chad Burmeister, Director of Corporate Sales, ON24
Quick Tips

Offer on-demand training.
Quarterly sales kickoffs are great for team-building and bonding, but they are time-intensive and expensive, especially when your inside sales force is global. Many sales leaders are moving toward video-based training that is always available online. Taking a page from “flipped” educational models employed by the popular Khan Academy among others, they are breaking learning into shorter segments, offering quizzes immediately after the material is consumed, and providing opportunities for reps to ask questions and engage with each other as well as instructors and experts in online forums in addition to face-to-face meetings.

Create a collaborative culture.
Reps can learn a lot from each other, especially when your team consists of both junior and senior sellers. Provide an easy-to-use platform – and incentives – for reps, subject matter experts and other sales and marketing professionals to share success stories, ideas about selling situations, and best practices as well as ask questions about products, internal processes, customer references or other inside-sales-specific topics. Provide tools that enable sales teams, internal experts, marketing, and partners to collaborate in the context of account and opportunity information.

Develop special playbooks for senior reps.
An inflexible process and verbatim “scripts” can kill creative approaches to customers. It’s best to develop flexible materials for senior reps. Use guides or customizable templates to make sure experienced sellers follow process without micromanaging their communications. Checklists are also a good idea (that’s why airline pilots use them.) Incorporate them into each opportunity stage in your CRM system.

Keep your playbook current.
As your business changes, invest in sales enablement resources to keep playbooks current and relevant. Ask reps what should be included and how they should be organized to make them most useful in selling situations. Playbooks should be attractive, intuitive, and immediately accessible during a sales conversation.
Chapter Five: Supporting Inside Sales with Content and Marketing

Many sales leaders want to hire inside sales reps, give them a list to call against, and watch the revenue come rolling in. But the best inside sales teams get heavy support from marketing departments. Unfortunately, many companies don’t fund – or underfund – marketing campaigns aimed at the customers inside sales serves. In these cases, sales reps ignore leads from marketing and instead pursue their own avenues to find new sales opportunities.

In the picture-perfect scenario, marketing – with the support of a sales development (lead qualification) team – delivers a consistent flow of highly qualified leads (gleaned from smart campaigns, targeted to the right market segments with the right messages) to sales, and uses input from sales teams to adjust messaging and marketing content accordingly.

Sales leaders who invest in establishing a robust inbound marketing program get a leg up when it comes to feeding reps with high volumes of well-qualified leads. A CEB study of more than 1,400 B2B customers across industries revealed that 57% of a typical purchasing decision has already been completed before a sales conversation happens (CEB Customer Purchase Research Survey). And the Wall Street Journal has reported that 92% of buyers have more confidence in information found online than they do in anything from a sales rep or other source (“New Info Shoppers”).

If the prospect has already heard of your company and finds the information you distribute valuable, reps don’t have to work as hard to establish rapport when they make that all-important initial contact. That’s why the best inside sales groups are supported by marketing teams that produce high quality content (for example, eBooks, online demos, white papers, videos, on-demand podcasts, and webinars).
How to Help Sales and Marketing Work Together

Marketers fail to help reps sell when they focus only on “branding and awareness” and don’t talk with sales to uncover what actual customers and prospects are concerned about. Both teams feel frustrated; meanwhile, sales and marketing leaders watch some of their most expensive resources circle the drain. Without agreement on what constitutes a qualified lead, and without continual collaboration on how to best attract and nurture qualified leads, sales and marketing teams cannot function at their maximum effectiveness. Make sure both teams implement a lead scoring program and automate passing leads from marketing to sales (and back again). Commitments to response times for both groups are important, too, as is general ongoing communication. For example, you should provide processes for sales to provide feedback to marketing such as reporting on lead sources and rating of both internal sales tools and customer-focused content in terms of quality and usefulness.

There’s an efficiency component to this kind of content generation. When you invest in resources to produce engaging materials, your sales reps don’t have to spend an hour on the phone with individual prospects to explain what your company does. Reps can instead forward a video or an eBook that showcases your expertise and thought leadership. This results in a deeper level of trust with prospects that are looking for a solution but are not quite ready to buy.

Competitive inside sales organizations do not leave content distribution to the domain of marketing alone. Customers simply move too quickly online. If reps are not sharing useful content via their social media profiles, conducting live demos and presentations, sending personalized emails with their own signature, and possibly even contributing to blog content, they’re losing out on opportunities to make direct connections with potential customers. But they don’t have to do this manually; sales leaders can help them accelerate that success with technology, by investing in tools such as marketing automation, collaboration, and sales enablement tools.

57% of a typical purchasing decision has already been completed before a sales conversation happens.
Quick Tips

Co-create a lead scoring system and establish joint ownership.
Sales must work with marketing to define the profile of buyers who are most likely to buy (aided by analytics). Once you have this definition, agree on the type of action appropriate for each lead at different stages in the buying cycle. Research has shown that 81% of top-of-funnel buyers are not yet “sales ready;” meanwhile, 50% percent will need further nurturing, and 25% may not have been an appropriate fit in the first place (“The Ultimate Revenue Engine”). Based on how a conversation between the sales rep and the prospect goes, sales might actually hand the lead back to marketing and say, “This prospect isn’t ready to buy, and we need to do more lead nurturing.” Look into how well your sales and marketing teams are passing leads back and forth; this will give you a better sense of how accurate your lead-qualification criteria and processes are.

Pay attention to volume, timing and fair distribution of leads.
Set targets for qualified lead volumes per month/quarter and identify clearly who needs to do what and when to reach established goals for the company. At the end of the month or quarter, you don’t necessarily want sales pursuing leads that still need heavy nurturing. You want them to be closing on very highly qualified leads. By thinking strategically in this way, sales and marketing leaders can budget and time campaigns appropriately to maximize sales productivity and avoid follow up delays. To solve the recurring complaint among sales teams that they lack enough good leads, some companies assign marketing qualified lead targets or ask them to produce qualified leads by territory to ensure even distribution of lead generation.

Don’t neglect existing customers.
Add-on revenue in the customer base can be significant – and churn can ruin your quarterly goals. Nurture your customers – as well as your prospects – with top-quality content that can help their business.

“I invited the sales and marketing leadership teams together. We quickly determined how best to implement changes to improve the entire lead-to-close process. The end result was improved sales and marketing alignment and better end-to-end execution of programs. Ultimately, these improvements delivered qualified pipeline opportunities and revenue.”

– Erica Schultz, EVP Global Sales and Markets, LivePerson
Part III: Growing a Highly Competitive Inside Sales Team

While process, metrics, and technology will give you an edge in inside sales, if you are expanding an existing group or starting up a new inside sales organization, you’ll need the right people to execute a truly exceptional inside sales strategy. These chapters cover some of the most important things the best companies have done when creating inside sales organizations.
Chapter Six: Better Hiring Strategies

Hiring and recruiting can be a challenge, especially in parts of the world where inside sales isn’t commonplace or where competition for candidates is fierce. But with the right approach, you can absolutely assemble and retain a top-performing team.

What does that kind of approach look like? Think of structuring your sales-hiring approach the same way you would think about prospecting. Establish a process for engagement and follow up, cultivate trust and credibility, and show how you can create a mutual value for each other.

Just as your marketing department works creatively and intelligently to engage prospects using different messages and media, you have a number of options to help you avoid the humdrum approaches of most companies. For example, consider your interview process. Ask yourself how these recruits will be spending their time. Will they be expected to use social media as part of the job? If so, use social media to find those candidates. Take to LinkedIn and Twitter to advertise job openings, and examine the social media profiles of potential candidates.

If they’ll be spending a lot of time on the phone, conduct job interviews by phone so you can gauge the quality of their phone skills. Find out how well they use video-conferencing, screen sharing, and other online tools.

You may also have to do some work to make your inside sales culture attractive to the kind of people you want to hire. Don’t underestimate the appeal of flexible work schedules, an eco-friendly office, and a demonstrated commitment to charities or volunteer organizations. Candidates are looking at the whole package. Even if your company culture is a bit more staid, you can still create a new, fun, friendly environment in inside sales.

“When hiring new reps, I advise managers not to move too quickly. There is usually extreme pressure to bring quota-carriers on board quickly, but mistakes happen when you move through the hiring process too quickly. I look for a combination of tangible and intangible traits. We’ve created a checklist to tease out critical qualities that correlate to success in our complex sales environment: intelligence, work ethic, commitment, competitiveness, integrity, attitude and creativity.”

– Amy Walsh, North America Inside Sales Director, Wind River (a wholly owned subsidiary of Intel)
Quick Tips

Clearly define roles and expectations.
Be specific. Service or subscription renewal sales reps have different skills from new business reps. New business reps often fail selling to existing customers and vice versa. Inside sales reps that have succeeded in start-ups might not fit well in large corporate environments. And field reps don’t necessarily make great inside reps. Be clear about the kind of skills and experiences the job will require so you can cull applicants who are not a good fit from the get-go.

Consider career path.
Does this job offer opportunities for growth and advancement? This can be a deciding factor for new recruits, especially younger candidates. After they’ve proven themselves in an entry-level role, what can they expect next? A majority of your inside sales team can be home-grown by promoting entry-level sales employees who start in a sales development or lead qualification role – often established as a liaison department between sales and marketing. A classic career path is starting in inbound sales development often leading to positions in outbound sales development and then into quota carrying inside sales roles. Internal promotions allow inside sales managers to grow their departments with decreased hiring and onboarding time.

Work with your recruiter.
Explain clearly to your internal recruiter what kind of person you’re looking for, what that person will need to do, and where and how to attract that type of person. Often human resources departments handle recruitment for sales positions, and the recruiters might not understand the difference between field and inside sales, for example. If you need someone proficient in phone skills and online or social media usage, then the recruiter needs to know that. It would also be helpful for them to understand what a compelling package would look like to your ideal candidate – this can help give you an edge in an era where appealing candidates may be juggling multiple job offers.

Fast-track results by hiring experienced management.
Inside sales is a specialized field and requires unique skills. If you are building a new team or expecting fast results through optimization of an existing team, it pays to hire a senior manager with the appropriate experience and instincts to avoid costly mistakes or delays.
Chapter Seven: Winning Compensation and Incentive Packages

Compensation is always an influential factor when candidates are considering a sales role. Compensation is also a critical component of business strategy, and sales incentives are especially important to get right in high-volume selling environments.

Generally speaking, inside sales reps will invest their time and energy on whatever activity will yield the highest personal return. So you need to align your comp plan with the most important measurable goals you’ve set. These goals could include increasing market share in a new industry, increasing sales of a new product line, improving customer retention, or selling new business.

Bear in mind that the wrong pay package can ultimately weaken your position in the market. Because customers have more choices, more options, and access to more opportunities, companies need to offer a truly superior experience. And unless you pay close attention to incentivizing and motivating reps, you won’t be able to hire or retain the kind of talent that can provide the kind of customer experience that stands out from the crowd.
Quick Tips

**Challenge reps to perform, but strike a balance.**
A sales target that’s too easy to achieve has obvious implications on sales productivity. Yet a quota that is so high that it is not achievable can have devastating effects. Successful companies structure plans to include bonuses or commission accelerators for “stretch goals” or overachievement.

**Compensate reps on things they control.**
Team selling models with combined quotas can work well, but if the bulk of your inside team’s income is tied to whether or not someone else – like a field sales rep – closes a deal, you’re setting up inside reps for frustration and disgruntlement. Many companies have established both individual and team targets to cover both bases.

**Automate commissions.**
No sales leaders should have to waste their time vetting Excel spreadsheets to ensure commission checks are accurate. Commission payment delays and errors are a surefire way to disrupt sales team productivity. Sales compensation automation solutions that integrate with existing CRM systems could be a worthy investment.

**Motivate the entire team.**
There are many ways to think about the art and science of motivating a sales team, but one way that’s outdated is to reward only your top selling reps. For inside sales teams, a rising tide lifts all boats – comp plans that recognize performance improvements of average reps and include incentives for team goal achievements in addition to individual performance will yield better overall results. This will also encourage collaboration and idea sharing – something that distinguishes top performing inside organizations from the rest.
How to Get Started

Leveraging an inside sales team is a proven way to achieve business growth. Here’s a quick guide on how to best use the information in this eBook to ramp up new inside sales initiatives quickly.
1. Start a conversation with your executive team and key sales leaders.  
Share this eBook, “socialize” the ideas to get buy-in from the right people, and brainstorm about improvement possibilities. A high-performance inside sales organization can be threatening to some traditional sales professionals, especially those who have sold in the field their whole careers. Be sure to address concerns to avoid distractions, conflict or sabotage.

2. Identify the areas with the most opportunity.  
Take a baseline measurement of where you are now, compare to the best-performing companies that are similar to yours, and consider key factors such as revenue potential, cost, implementation difficulty and time to results. Some things will be obvious to your internal team. It might be valuable to get an objective perspective and new ideas from experts outside your company.

3. Agree on priorities, set measurable realistic expectations and design an implementation plan.  
Get the right people to commit to a short list on which to focus and develop an implementation plan that clearly identifies accountabilities: who is responsible for doing what by when. Include a realistic budget that is easily approved within the context of expected results. Set objective and measurable targets. You will be learning things along the way – like how long it really takes to see changes and measurable return.

4. Start with a small team.  
Especially if your team is large, don’t try to get everyone on board and change your whole sales organization at once. Start with a limited number of reps or territories that are most open to change and most likely to succeed. The others will follow when they see results.

5. Take comparative measurements and publicize success.  
Set yourself up with “before and after” KPI measurements or A/B tests. This will be useful later when you report on results and ROI and can help you justify future investments. Make a big deal out of promoting the results.

6. Continue improvements.  
Once you know what works, expand to the rest of your team in a planned manner. And don’t stop experimenting with new approaches. The top performing inside sales organizations are always in optimization mode.

7. Invest in technology to give your team the best chance of success.  
The good news is that with the right integrated systems, you can increase sales productivity, improve customer response time and deliver a superior customer experience all at the same time. The best performing inside sales organizations deliver as much information about prospects and customers as they can directly to their reps’ online selling environment: the CRM. When reps have to spend time to search other systems, do research online, or perform manual tasks that could be automated (like proposals or price quotes), they spend time away from buyers. In this era, the seller who gets back to the customer first often wins the business. Budget for sales productivity systems to help support best practices and supercharge sales results.
About Anneke Seley

This eBook was written by Anneke Seley. It was first published by and contains select input from SAP. Anneke has been a creator and champion of global inside sales organizations since the 1980s, when she started and grew OracleDirect from $0 to $25M. She is the founder and CEO of Reality Works Group and coauthor of *Sales 2.0: Improve Business Results Using Innovative Sales Practices and Technology*. Anneke and her team at Reality Works have helped hundreds of global companies increase revenue by optimizing their inside and social selling teams. Anneke continues to write, speak and explore the concepts presented in this eBook and welcomes your questions and comments on her blog, “The Sales 2.0 Advocate.”

Has this eBook given you some new ideas about inside sales? Share your comments on [www.sales20book.com](http://www.sales20book.com)

Anneke Seley
@annekeseley
aseley@realityworksgroup.com
www.realityworksgroup.com
Phone: 510-749-9073
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Amy Walsh, North America Inside Sales Director, Wind River (a wholly owned subsidiary of Intel)

Chris York, Director of Inside Sales, Fujitsu