SALES PRODUCTIVITY UNLEASHED:

4 TACTICS TO CLOSE DEALS FASTER

With the clock ticking on every deal, the only way to succeed in today's sales game is with tighter teamwork and collaborative selling. Learn the latest approaches to speed up deals and earn the win.

All Selling Is Now Collaborative Selling

When 57% of sales reps admit that they expect to miss their quota this year, you have to pause and wonder why. Yes, competition is fiercer than ever, **but this level of failure points to a deeper problem:**

Customer expectations and the pace of business are changing, and most sales teams haven't adapted.

Sales used to be a one-on-one engagement between a savvy sales rep and customer. Now it's a team sport, with more stakeholders weighing in on the deal, working hard to meet sky-high customer expectations. Sales reps need to coordinate and share information with more people across multiple departments and–given the speed of business and intensity of competition–complex deals need to move through the pipeline faster. The old-school tools, tactics, and processes simply can't keep pace with today's accelerated sales cycles and omni-channel customer interactions.

Collaborative Selling Produces Results

To retire quota faster and push deals over the finish line, your sales reps need to work more collaboratively, and they need the right tools and processes for the job.

25% **Increase in productivity**

25% **Increase in pipeline**

According to Salesforce's Second Annual State of Sales report report, 60% of sales professionals say that collaborative selling has increased productivity by more than 25%, and more than half (52%) say it has done the same for increasing pipeline.

Read this e-book for insight and advice on how to empower your sales teams to work more collaboratively, close deals faster, and drive your business forward.

4 COLLABORATION CHALLENGES FOR SALES PROS

Four common challenges make collaborative selling a lot harder than it needs to be.

Cat-Herding and Complex Deals

Deals are more complex and involve more people in the decision-making process.

Information Stuck in Silos

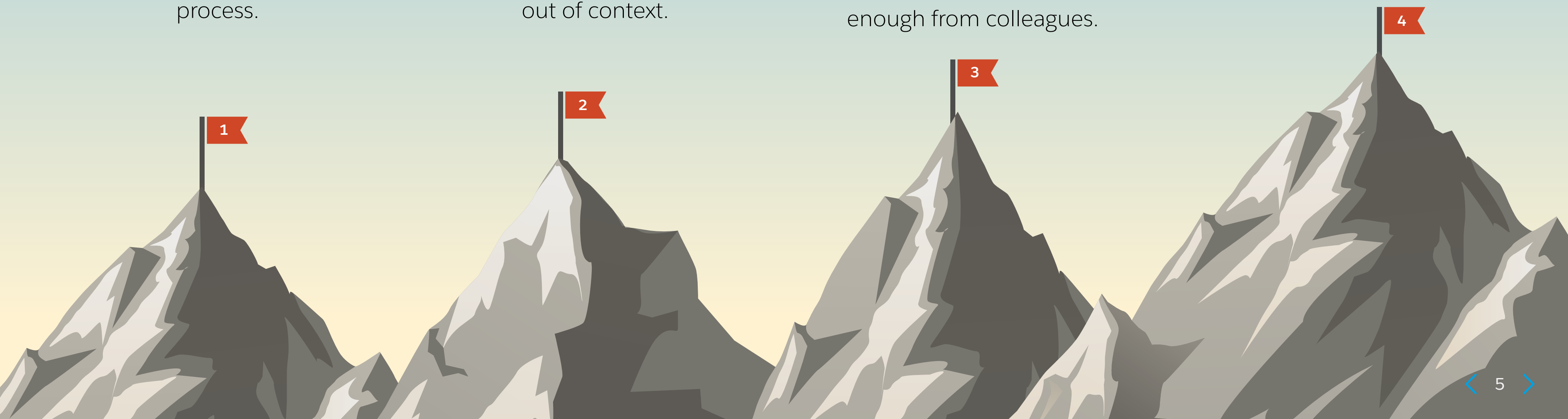
Without ready access to information, stakeholders make decisions out of context.

Fire Drills and Chaotic Communication

Urgent requests fly in and sales reps can't get answers fast enough from colleagues.

Too Much Admin, Not Enough Selling

Endless admin and account tasks mean sales reps don't have enough time for actual selling.



CHALLENGE

#1

Cat-Herding and Complex Deals

Gone are the days of straightforward, transactional selling. Today's sales teams must sell a wide variety of products and services inherited from mergers, acquisitions, and fast-moving product development. But how can one sales rep be an expert in all areas and still do right by the customer? They can't.

That's why complex deals require an array of experts: solutions engineers and technical experts, product managers, legal and finance professionals, and often senior executives at the final hour. They're all part of the sales team now.

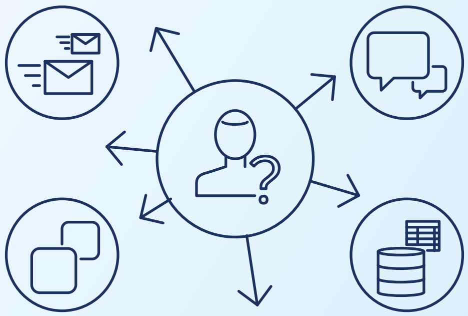
To close deals, sales reps need to solicit and coordinate input–aka herding cats–from all of these individuals in a timely, fluid fashion. Managing that complexity is a job in and of itself.

Another reason deals are more complex: customer expectations. Today's customers demand more customized, consultative engagements than ever before. High-performing sales teams are 2.8 times more likely than underperformers to focus extensively on personalizing customer interactions, according to Salesforce's Third Annual State of Sales report.

CHALLENGE #2

Information Stuck in Silos

To make good decisions and provide helpful input on a deal, all these stakeholders need immediate access to information.



Yet critical context about a deal or a customer is **often unavailable and trapped in silos**–email, apps, chat threads, CRM–rather than consolidated in an integrated system of record that can be accessed by everyone, from the sales rep to technical and product experts.

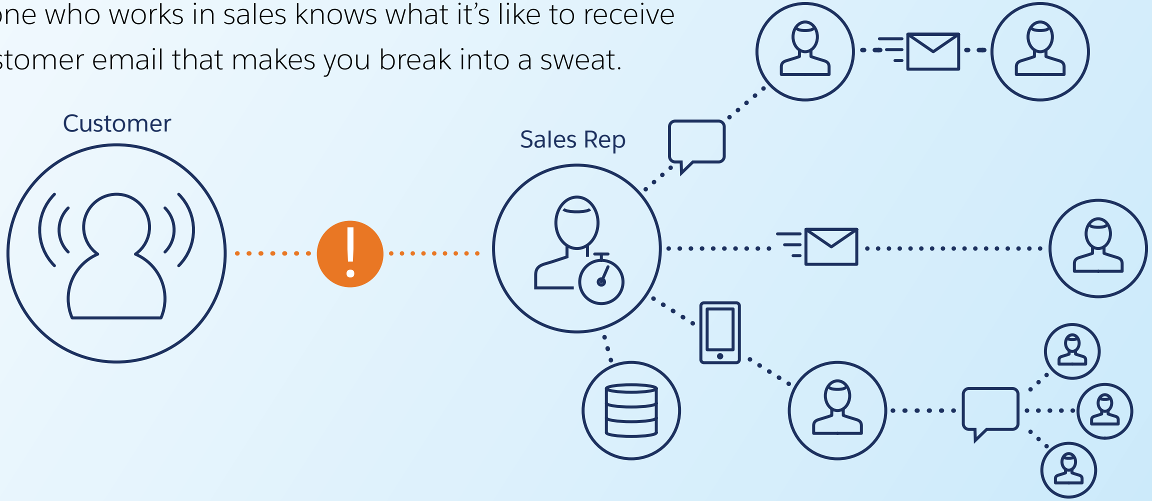
Thanks to these silos, even a sales manager can be left in the dark, unaware of customer objections, mounting friction, and stalled processes. The old-school, super-slow way to get colleagues up to speed is then via long email chains and tedious meetings that often revisit previous discussions.

Historical insights about a customer or deal are often walled off in email or apps as well. When sales reps leave a company or territories change, that information is lost and new account managers struggle to get up to speed. Then a frustrated customer must re-explain their needs and pain points.

CHALLENGE
#3

Fire Drills and Chaotic Communication

Anyone who works in sales knows what it's like to receive a customer email that makes you break into a sweat.



The customer is playing hardball on pricing, or asking a difficult question, and wants an answer immediately. Often times, the response requires a team effort and needs to go up the chain for approval.

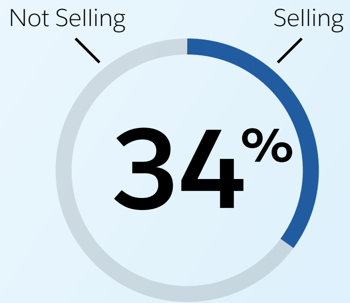
That's when the chaos begins: emergency text messages, chats, emails, and phone calls–collaboration tools that are as slow as they are disconnected.

On top of it all, you're left worrying whether all the right people are involved in the conversation and all the details ironed out in your final reply. If only these fire drills didn't happen every single week!

CHALLENGE #4

Too Much Admin, Not Enough Selling

Getting alignment on complex deals–and using slow, legacy tools to collaborate with a crowd of stakeholders–turns sales reps into project managers mired in admin tasks. Acting as account managers for existing customers and managing those relationships eats up time as well.



Today's sales teams have less time than ever for actual selling–**a mere 34% of their week.**

According to Salesforce's Third Annual State of Sales report

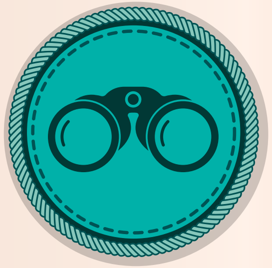
Another report by McKinsey found that sales reps spend **28% of the work day reading and answering email and 19% of their time searching and gathering information**. As a result, they have less time to engage prospects and close deals.

Team Selling Badges: 4 Keys to Earn More Wins

Communication
Consolidate internal coordination on a single platform

Collaboration
Collaborate *within* data and documents, not around them

Alignment
Align teams around the customer journey



Insight
Maintain a single, shared view of the customer

To close deals faster and speed productivity, your team must master four best practices.

High-performance sales teams have already adopted these practices. They've replaced ineffective tools and processes and embraced a more collaborative, productive, and team-based approach to selling. Curious how they did it? Read on to learn how to move faster internally, accelerate deal velocity, and clinch the wins.

COMMUNICATION

Best Practice

Consolidate Internal Coordination on a Single Platform

Disparate communication channels contribute greatly to the admin slog that slows down sales reps. When you're forced to sift through long email chains and chat threads, decisions will always be slower, and that slowed momentum can end in a deal falling apart.

Collaborative selling requires a single communications platform (bonus points if it integrates with your CRM data), yet is accessible by any team member.

These modern “productivity platforms” are digital workspaces where sales reps, product managers, engineers and executives can send messages, post comments and respond to colleague’s questions. They can solve problems together by communicating within public or private groups on the platform.

ACTION ITEM

Take an inventory of all the communication channels your sales teams use during a sales cycle and determine which ones are integrated and contextualized with CRM data versus those that are siloed. Consider the negative impact of your sales reps having to switch among those systems.

Best Practice

Collaborate *Within* Data and Documents, not Around Them

Consolidating your communications onto a unified productivity platform is a huge step forward, but it's only the first step. A productivity platform should also accommodate the key documents and data within your sales process–win plans, account plans, quarterly business reviews, and mutual success plans. Then collaboration can happen right within each of these resources, not around them.

All this information needs to live in one place so each deal's progress is visible to anyone at any moment and communication can happen right within each document or report. Contrast the immediacy and clarity of this "collaboration in context" with the obsolete practice of conversing in long emails and sending attachments back and forth.

Think of a productivity platform as a structured workspace where teams can come together and collaborate within the context of a specific goal and all of its related information.

That context makes all the difference for speed and productivity: Team members can access the right information, at the right time, for the right decision. Access to real-time data about customer interactions can keep a sale on track by providing a holistic view of the customer across different touch points.

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In addition to improving collaboration between sales, marketing and other groups, don’t overlook the power of collaboration within your sales teams. Team selling is most successful when your sales reps continuously help one another by sharing customer insights, prospecting strategies, and market data and research.

Ask yourself, are my team members surviving solo or thriving as a team? If it’s the former, coach your team members to support and assist one another. Then evaluate whether your tools and systems support this collaboration and capture institutional knowledge.

ACTION ITEM

Audit your existing digital tools and platforms used for collaboration. If data and processes are siloed across multiple systems, it’s time to investigate your options for a modern, digital productivity platform. Remember that a strong integration to a CRM like Salesforce is critical.

ALIGNMENT

Best Practice

Align Teams Around the Customer Journey

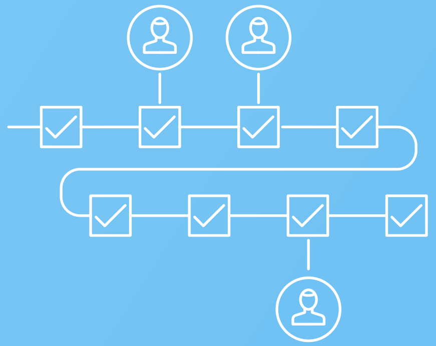
In the Age of the Customer, sales, marketing, and service teams must be closely aligned. Seventy percent of customers expect connected interactions and processes across the customer journey–from smooth handoffs to contextualized engagements based on earlier interactions, according to Salesforce's State of the Connected Customer report.

This level of coordination requires sales, marketing, and service teams to work together and define their roles and types of engagement at each stage of the customer journey.

Do sales reps know when a marketing campaign or offer is about to go live? Do marketing managers get regular feedback from sales about which messages are resonating? Are customer service agents sharing updates with sales about upselling opportunities?

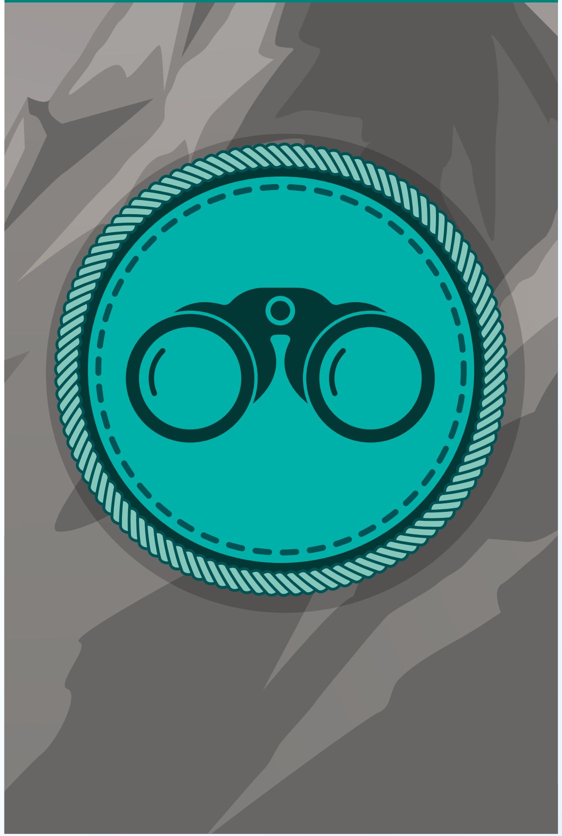
High-performing sales organizations not only create alignment across various functions, but ensure cohesive best practices and messaging throughout the entire customer journey. From onboarding new customers to renewing contracts with long-term clients, sales reps need to make sure interactions and experiences effectively represent a brand and drive customer success at every step of a customer's journey.

ACTION ITEM



Map out the team handoffs that occur throughout the customer journey and meet with other team leaders to discuss better alignment to improve the customer experience.

INSIGHT



Best Practice

Maintain a Single, Shared View of the Customer

Collaborative selling–and alignment around the customer journey–is only possible when different departments and individuals share the same information and insight about the customer. According to the Salesforce's Second Annual State of Sales report, top teams are 2.1 times more likely than underperformers to be “Outstanding” or “Very Good” at having a single view of the customer.

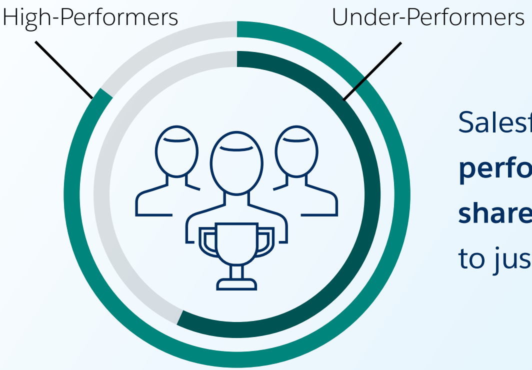
360 VIEW OF THE CUSTOMER

A well-organized and integrated CRM is the foundation of a 360-degree customer view. If data gathered from customer interactions across channels–email, social, customer service calls–is not captured in the CRM, your sales reps can't see a full picture of customers and how they're interacting with your brand.

What typically gets left out of the 360-degree view, however, is the wealth of unstructured internal communication and resources–decisions, plans, briefs, comment threads–that round out the customer profile and provide invaluable insight.

By eliminating these information silos to provide a deeper shared view of the customer, sales reps can more quickly collaborate and take action as new data emerges from various touch points. When a sales rep receives a lead, they're more likely to understand why that lead is qualified and ripe for pursuit. For an existing customer, account management takes less time.

Across teams, a shared focus on customer experience and the customer journey also requires shared goals and KPIs. In particular, sales and marketing can benefit from working off the same customer-focused metrics.



Salesforce reveals that **88% of high-performance sales and marketing teams share common goals and metrics** compared to just 61% of under-performers.

While individual and team quota metrics are never going away, sales and marketing can align around metrics like customer satisfaction (CSAT), MQL to SQL ratio, sales velocity, customer retention rate, sales revenue, and marketing-sourced revenue.

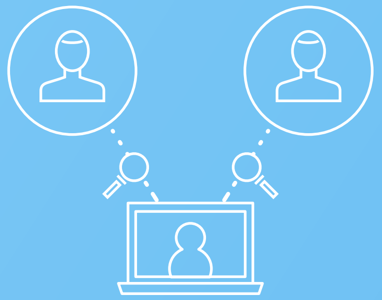
Also interesting to note is that the sales KPIs with the highest projected two-year growth, according to Salesforce, are KPIs typically shared by multiple teams:

+118%	Net Promoter Score (NPS)
+105%	Pipeline accuracy
+94%	Customer lifetime value (CLV)

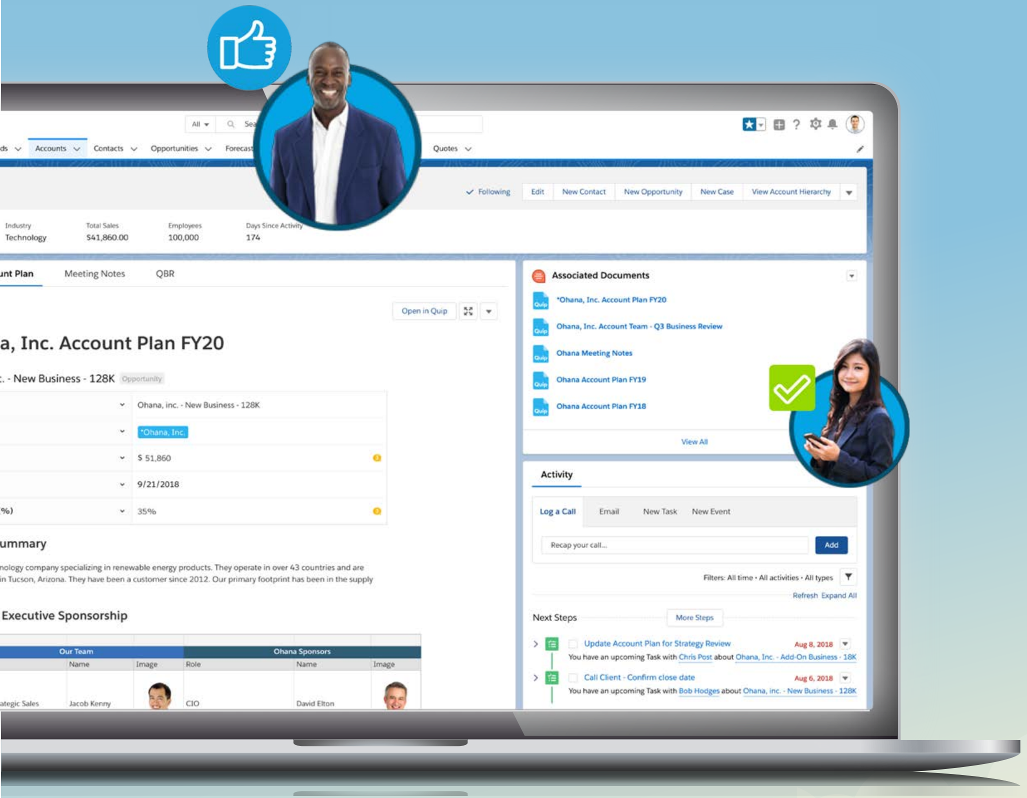
Sales and marketing teams can regularly discuss these metrics and share each other's expertise about what's working and what isn't. They can set dependent goals and processes, for example:

- Marketing will generate X leads per month and X MQL's to achieve revenue goals.
- Sales will follow-up with SQL's within X minutes.

ACTION ITEM



Determine if your sales teams and internal sales stakeholders have a shared view of the customer, or if your prospect and customer data is siloed in different systems. Consider your options for an integrated digital platform that brings these data streams together.



How Quip for Sales Speeds Up Collaboration

A unified productivity platform helps sales teams play the game faster–breaking down silos, collaborating and communicating more effectively, and closing more deals. But not all platforms are created equal.

Enter Quip for Sales, which helps sales teams shorten deal cycles, boost productivity, and retire quota. By adding Quip to Salesforce, your team can:

1

Centralize deal work:

Embed modern productivity documents inside Salesforce records so every part of the deal lives in a single view. Help reps keep everyone on the same page so no one misses a beat.

2

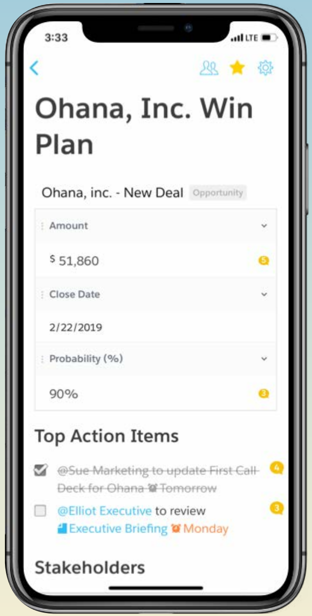
Scale your sales strategy:

Standardize and simplify how your teams win deals with customizable document templates for plans, briefs, and notes inside Salesforce. Give your team blueprints to deliver on customer needs, no matter how unique.

3

Coordinate deals faster:

Spring into action without disconnected email or chat storms that live outside your CRM. Satisfy urgent customer needs through real-time collaboration that's always connected to Salesforce.



4

Contextualize real-time Salesforce data:

The Salesforce Record Live App for Quip allows you to view, update, and discuss field data for Salesforce records from inside a Quip doc or slide. Keep teammates who don't live in Salesforce up to date and work together faster.

5

Create sales process templates:

Save time by using a range of useful templates. For example, a meeting template can allow sales reps to easily record meeting notes in dated sections for ready reference—a comprehensive and easily searchable review that's always current. Similarly, an onboarding template can make sure new hires get up to speed quickly.

6

Work anywhere:

As a fully mobile-enabled productivity platform, Quip provides consistency across mobile and desktop connections, enabling sales reps to work anywhere, anytime, and on any device. Make contributions to documents, spreadsheets, inline comments, and messages in real-time to maintain momentum.

Together, Quip and Salesforce empower sales organizations with a more complete view of their customers. With Quip for Sales, teams can work together to improve the customer experience at a time when acting faster–and smarter–can make or break a deal.

Add Quip to Salesforce Today

Quip documents are real-time, contextual, and fully integrated with Salesforce. Try Quip for Sales with your team for free today and make deals simpler.

Learn more at Quip.com