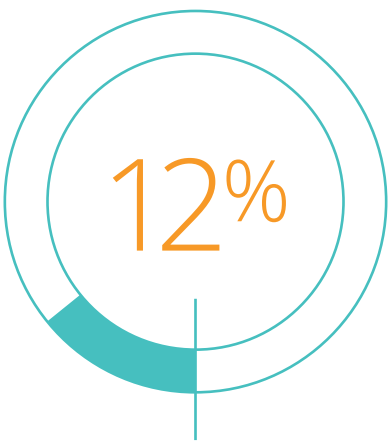
textexpander

The Productive Sales Process

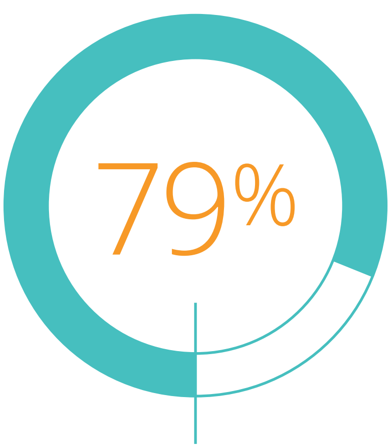
Maximizing Results *at* Every Step

Source: Salesforce

of organizations can't measure sales productivity



of companies aren't sure who is responsible for sales productivity



of executives say hitting business goals requires improving sales productivity

Have you ever calculated how much time you—or your team—spends actively selling each day?

Chances are it's *less than three hours*.

In fact, up to two-thirds of a salesperson's time each day can be spent on non-revenue-generating tasks such as navigating internal processes, filing paperwork, building reports, and more. With so much on your plate, you can't simply allocate more time to sales-specific activities to boost your revenue.

To meet your goals, you have to find a way to be more productive instead.

When it comes to *maximizing time* and minimizing resources to improve your sales process productivity, it can be hard to know where to start. In fact, *almost half of all organizations have no way to measure sales productivity* and as many as 12% of companies aren't even sure who is responsible for it.

Yet, 79% of executives from that same survey say that hitting their *company's goals*—such as closing more deals and improving their bottom line—requires improving the productivity of their existing sales team.

According to the most basic definition of sales productivity, there are two ingredients to getting more done: increase your efficiency and increase your effectiveness. That means spending more time on high-impact activities, less on low-impact activities and maximizing the use of your resources to accomplish your goals.

Efficiency + Effectiveness = **Sales Productivity**

If you're already putting all of your effort and much of your time into hitting your quotas, working harder simply isn't a reasonable option. It's certainly not a very *motivating one*. So, let's explore tips, tricks and tools even the busiest sales reps can use to *maximize their time* at each step in the sales process.

Using some of these recommendations will allow you to *close more deals* with less work.

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Prospecting: **Start Your Sales Process Off Strong**

Up to

50%

of a sales team's time can be wasted gathering leads

Prospecting is the *critical first step* to every sales process. A curated prospect list is essential to hitting your sales goals.

Whether you're sourcing leads from events, networking groups, referrals, purchased lists, or any number of alternatives, being able to prospect quickly and effectively is a necessary skill for a productive salesperson.

Plus, a solid prospecting strategy sets you up for success down the road.

Prospecting Metrics

LEADING IN

# of new contacts found

# of new contacts added

LOOKING BACK

# of prospects that turn into customers

How can you improve?

According to HubSpot, up to *50% of a sales team's time can be wasted* gathering leads. *Sales teams are pressed for time*. What can you do to *prospect better leads* more efficiently without adding more work to your day?

The first thing we recommend is putting manual prospecting in the back seat for a bit and investing in an automated approach (check out the tools on the next page). Also, implement or upgrade your customer relationship management (CRM) system. Doing so will help you create new customer records, and save time keeping track of their status.

What's the best way to measure productivity?

We know leads are valuable. The question is: How do you get more of them?

It's a great question. Knowing the number of leads you're prospecting is a good way to understand how productive your process is.

Knowing how well your sales process is working *takes a deeper understanding*. Get to know your ideal customer, your expected outcomes and the length of time it takes to convert them.

You can get a rough measure of success by calculating how many of your prospected leads turn into customers. If the number is lower than you expect, consider adjusting your prospecting process or requirements.

Tools for success

To automate your lead sourcing, try a list building tool such as:

- Apollo's Prospect Searcher
- eGrabber
- Hunter
- Lead Scrape
- Zoominfo
- LinkedIn Sales Navigator

Using a well built, customizable CRM platform will keep your data clean and consistent. Take a look at:

- Close
- HubSpot
- Salesforce

Connecting: **Master the First Touch in Your Sales Process**

PRO TIP

When discussing your solutions, *provide value* at this stage. Do not sell.

Mastering the first touch can be difficult.

Once you have a prospect on the phone you *have less than a minute* to make an impression.

Getting it right takes practice and patience, but *cold calls* and outreach *emails* are both highly effective methods for getting a meeting with a decision-maker—*especially when used together*.

Connecting Metrics

LEADING IN

# of calls made/ answered

# of emails sent/ opened

# of touches before a connection

# of scheduled appointments

LOOKING BACK

# of kept appointments

How can you improve?

There are a number of ways to *level-up your cold calling skills*, but the first thing we recommend, is preparing for the individual types of connections you plan to make.

To do this, you need a good understanding of your ideal customer, the challenges they are facing and how your solutions help solve them.

Ask yourself:

- **What do I know about this prospect's business?**
- **What might their goals and objectives be?**
- **What is unique to their industry?**

Personalize your communications by referencing a problem your prospect might be experiencing. This will help you make a connection early and get your relationship off to a good start.

Before jumping into your outreach, write out what you will say or send, then review it to make sure it comes across as human. Try adding personalizations such as "I hope you had a good weekend" or "I see you are offering a new service."

What's the best way to measure productivity?

Understanding how your outreach is working will help you plan the best way to spend your time.

For example, know the number of prospects who are answering your communications and how many phone calls you have to make before you get an answer. This will help you determine how effective your email/call cadence is.

Even with the right outreach, plenty of things can influence your productivity. Connecting with the right people, at the right time, on the right platform, can make or break your sale. Run iterative experiments to get to the bottom of these questions and adjust your process accordingly.

You can optimize your productivity by *automating parts of your process* such as sending introductory emails and *scheduling appointments*.

Tools for success

Here are our recommended tools for automating your prospect connections:

- Implement a CRM such as HubSpot or Close, mentioned earlier. Many have capabilities that allow you to automate your outreach, contact life-cycle and lead status scoring.

- Try a stand-alone sales engagement platform with content management capabilities, guided selling and analytics to make it easier to deliver value to your prospects without a CRM. We recommend SalesLoft or Outreach.

- Eliminate the back-and-forth availability conversations with an automated appointment scheduling tool such as Calendly or Setmore.

- Perfect your research and get to know your candidate's personality faster with AI tools such as Crystal, an app that analyzes your prospect's online profiles and delivers information to help you better communicate.

- Further automate your outreach with productivity tools such as TextExpander, which help you save time on repetitive typing tasks with form-like templated snippets of text you can expand with simple commands.

Qualifying and Preparing: **Get to Know Your Sales Prospects**

PRO TIP

Ask open-ended questions instead of simple yes/no questions to gain more information and have a more engaging back-and-forth conversation.

This stage of the sales process is where all of your prospecting and outreach pays off.

Remember those leads you connected with earlier?

This is the get-to-know-you/get-to-know-your-problems phase and probably the best point in your process to ensure your productivity.

Connecting Metrics

LEADING IN

Time spent researching

Lead response time

LOOKING BACK

Time spent on a call

How can you improve?

Once a prospect has been added to your lead capture system, automate the qualification process by setting up a lead scoring system. These systems assess how your leads have responded to your outreach and how much time they spend looking at your solutions. It then assigns them a lead score, which you can use to focus your research.

For example, to make the most of your lead qualification and preparation, take the highest-scoring leads from your database and dig in with a more manual approach to better understand:

- **The problem(s) they are trying to solve**
- **If they are evaluating other solutions**
- **Their role in the decision-making process**
- **If they have a budget**

Answer these questions with a sales qualification framework—*BANT* is a traditional option, while *GPCT* is a good option for well-informed prospects.

The information you gain from this process will help you better tailor your sales pitch and final ask. Add all these relevant details into your contact's record so it is readily accessible when it's time to close a deal.

What's the best way to measure productivity?

It can be hard to know when to stop gathering intel on your hottest prospects. How much information is too much, really? To keep yourself from *continuing down an unproductive rabbit hole*, remember to focus.

These metrics can help you determine whether you should spend more time preparing or if you should call it quits.

To maximize your time, aim to *send more precise emails* and try batching the time you spend researching and on the phone. Don't forget to share what you learn about prospects with your larger team by recording it in your CRM.

Tools for success

Here are our recommended tools for storing what you know about your leads:

- CRMs can provide the functionality you need to quickly collect, store and find information about each of your prospects. Systems such as HubSpot and Salesforce are built for this and integrate well with other lead management tools for easy lead transfer.

- Systems designed specifically for lead scoring such as VanillaSoft, are great for making and documenting a high-volume of calls.

- Databases such as G Suite or Microsoft 365 are an easily accessible way to store contact data if you aren't using a CRM or another lead scoring tool.

- Tools such as ZoomInfo and Apollo can help you fill in the gaps of an incomplete database. For example, if you have a name and company the software might be able to pull in the company's annual revenue.

Presenting:
Put Your Lead Research to Work

PRO TIP

Your talk doesn't have to be a long one. Remember, the magic part of the sales process involves listening not responding.

Your sales product demonstration should do one thing:

Communicate your solution's benefits by focusing on its value to your prospect.

This approach helps you build credibility and establish the trust you need to move your prospect through the final stages of your sales funnel toward a purchase.

Sales Presentation Metrics

LEADING IN

# of booked meetings

LOOKING BACK

Types of questions asked

Opportunity win rate

How can you improve?

Put all your research to work and create a message that gets right to the heart of your prospect's problems. The more you can demonstrate your familiarity with their challenges, the better you can direct them to your solution.

If you want to be a great salesperson, rehearse what you will say. Know your product's features and benefits by heart. Nothing says "this solution isn't quite right for you" like a sales representative that hesitates before answering a question.

What's the best way to measure productivity?

There is no universal trick to *getting your sales prospect to convert faster*, but there are a few ways to determine if what you are doing is working the way it should.

First, are you booking meetings with all of the right people?

If so, are they prepared to make a decision?

Ensuring you are getting in front of the decision-makers and that they are ready to take the next step is essential. It's always frustrating when you get to the end of a pitch and your prospect says "I can't make a decision right now because…"

Tools for success

Here are our recommended tools for creating and delivering home-run sales presentations:

You can save time creating presentations with the AI, templates and features in these non-traditional sales presentation tools:

- Focusky
- Prezi
- Slidebean

Create specialized graphics and videos with these online editors:

- Canva
- Visme
- Lumen5
- Animoto
- Loom
- Wistia's Soapbox

If you can't meet face-to-face, hosting an online meeting is a great alternative. We recommend:

- GoToMeeting
- Google Meet
- Zoom

Closing and Objection Handling: **Finish the Sale with Confidence**

ASK YOURSELF THIS:

Are your prospects saying no?

When it's time for your prospect to make a decision, how can you ensure they choose you and do so in a timely manner?

Work on your approach.

There are a number of *closing techniques* you can use. The one you choose will depend heavily on your particular circumstances. But there is one thing they have in common: Initiating the close is key.

Closing Metrics

LEADING IN

Time spent selling

# of proposals sent

LOOKING BACK

# of closed deals

# of lost opportunities

How can you improve?

Ask yourself this: Are your prospects saying no?

Handling objections is probably the most time-consuming part of closing a deal. If the price, timing or feature package aren't just right, it can take some time to settle on the final terms of your contract.

When you get handed an objection your response is essential for a fast resolution. Make sure you are able to articulate your value well. It is also helpful to focus on the next step, instead of reselling the product. Help your prospects see what life will be like after they've made a purchase.

What's the best way to measure productivity?

The journey to get to close can feel long. Looking back on the process there are probably many things you feel as if you could have handled differently.

However, your true measure of success comes down to measuring metrics, such as the volume of closed deals over a specific period. Digging into other metrics—such as lost opportunities—can tell you where you might need adjustment in your sales approach. Once you understand this, you can create a sales process that *maximizes your productivity*.

Tools for success

Eliminate some of the time it takes to create contracts and proposals and collaborate during negotiations with one of these tools.

- Proposify
- RFP360
- Bidsketch

Automate document signing to save yourself a lot of hassle at the end of a sales cycle. Try one of these tools for delivering contracts and collecting signatures:

- PandaDoc
- Lightico
- SignNow

Create templated blocks of text for frequently used information—such as your company's boilerplate, proposal language, and agreement terms—in tools such as TextExpander, which standardizes and simplifies repetitive workflows.

Following-Up: **Improve Your Sales Process**

PRO TIP

The sales follow-up process can have a lot of moving parts. Look to your existing technology stack to find the best places to automate it.

Following up with all of your opportunities—both lost and won—to make sure you've delivered on your promise, is essential. Nothing ruins your reputation faster than an unhappy customer or a lost opportunity that leaves with a sour experience.

Plus, you can use this final-stage connection as an opportunity to introduce cross-sells, upsells and address any remaining pain points that exist with your customer—a great way to increase your bottom line.

Follow-Up Metrics

LEADING IN

Sales cycle length

Annual contract value

Customer acquisition costs

LOOKING BACK

Customer lifetime value

Satisfaction ratings

Retention rates

How can you improve?

Take it one step further than seeking out your contact's opinions and encouraging repeat business. Ask open-ended questions and let your contact do most of the talking.

It's also a great idea to take this connection point as an opportunity to tap into their network. Get *referrals*, ask for recommendations—they're better quality and they cost less. Securing testimonials or asking customers to share their experience on social media will help you to refuel your sales pipeline with quality leads.

What is the best way to measure productivity?

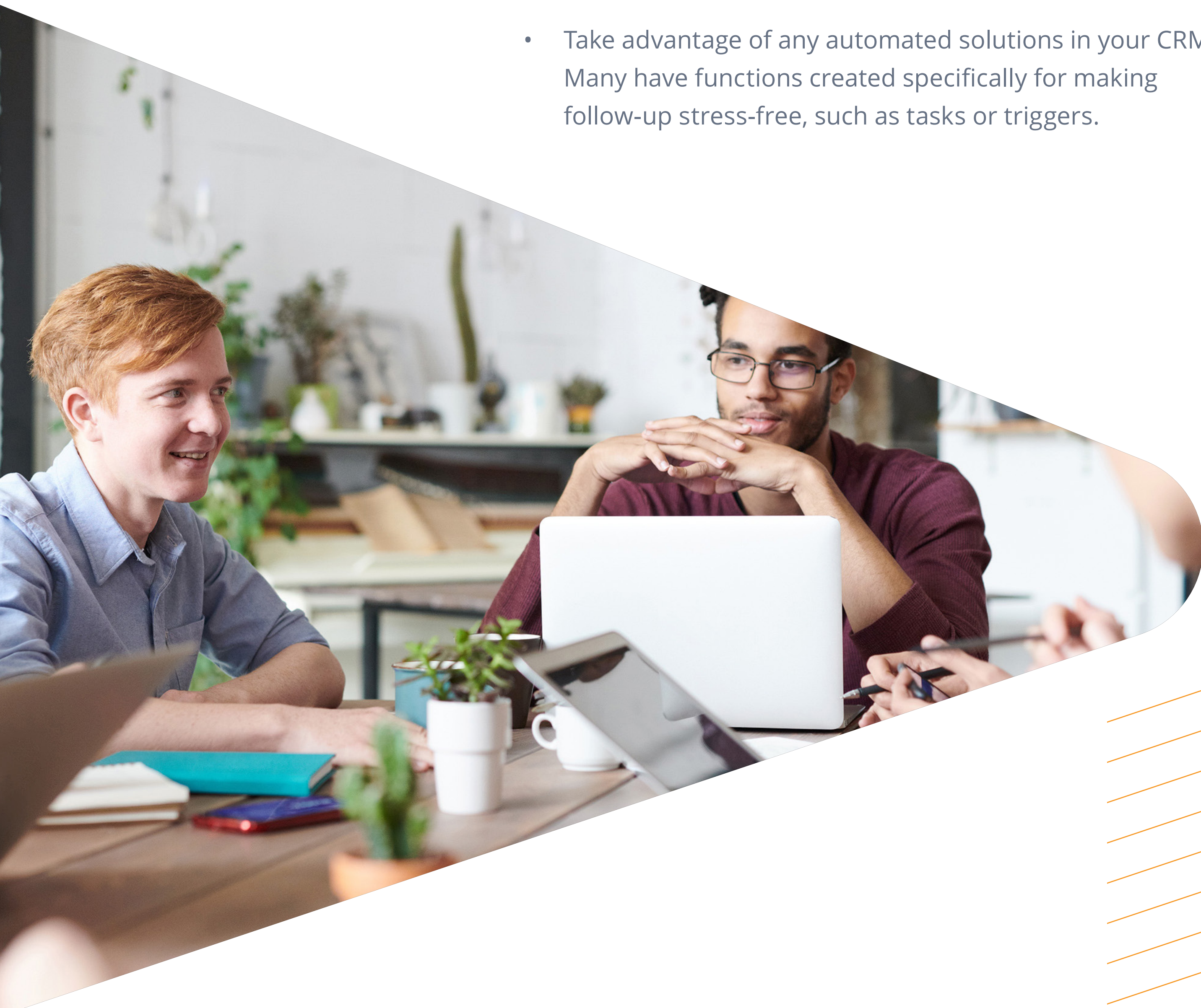
Setting a reminder task in your CRM is a great way to remember to *conduct these interviews*. But how do you make sure you get the most out of them?

When reaching out, treat it like another sales opportunity. Make sure you have a hook that makes it worth their time. Also, give your customer a heads up that you'll be reaching out at a later time to see how they are doing.

Tools for success

Here are our recommended tools for effortless sales follow-up:

- Set up a personalized questionnaire in SurveyMonkey that you send to your contacts before you get in touch.
- Create a library of questions you copy into your follow-ups as they make sense. Tools such as TextExpander make this simple by allowing you to save and share expandable templates.
- Take advantage of any automated solutions in your CRM. Many have functions created specifically for making follow-up stress-free, such as tasks or triggers.



Keep it Simple

Ready to make your sales team more productive?

Book a demo to see how TextExpander can help your team save time in nearly every step of the sales process.

Statistics show that the *highest-performing teams* use a lot more technology than their counterparts—sometimes up to *three times as much*.

Make sure yours works together and communicates efficiently. If you can, choose a single platform—such as a robust CRM system—that touches all aspects of your sales process.

If that's not possible, we recommend tools such as Zapier to help your productivity-boosting technologies communicate with each other.

Whatever you do, keep it simple for yourself.

The last thing you want to do is spend all the time you save managing your technologies. To be sure you're always functioning at your best, make sure you are dedicating time in your sales process to maximizing your tech for better productivity and getting people through your sales funnel faster.