The Sales Manager's Guide to Modern Selling

Sales Acceleration. Artificial Intelligence. Salesforce Automation.

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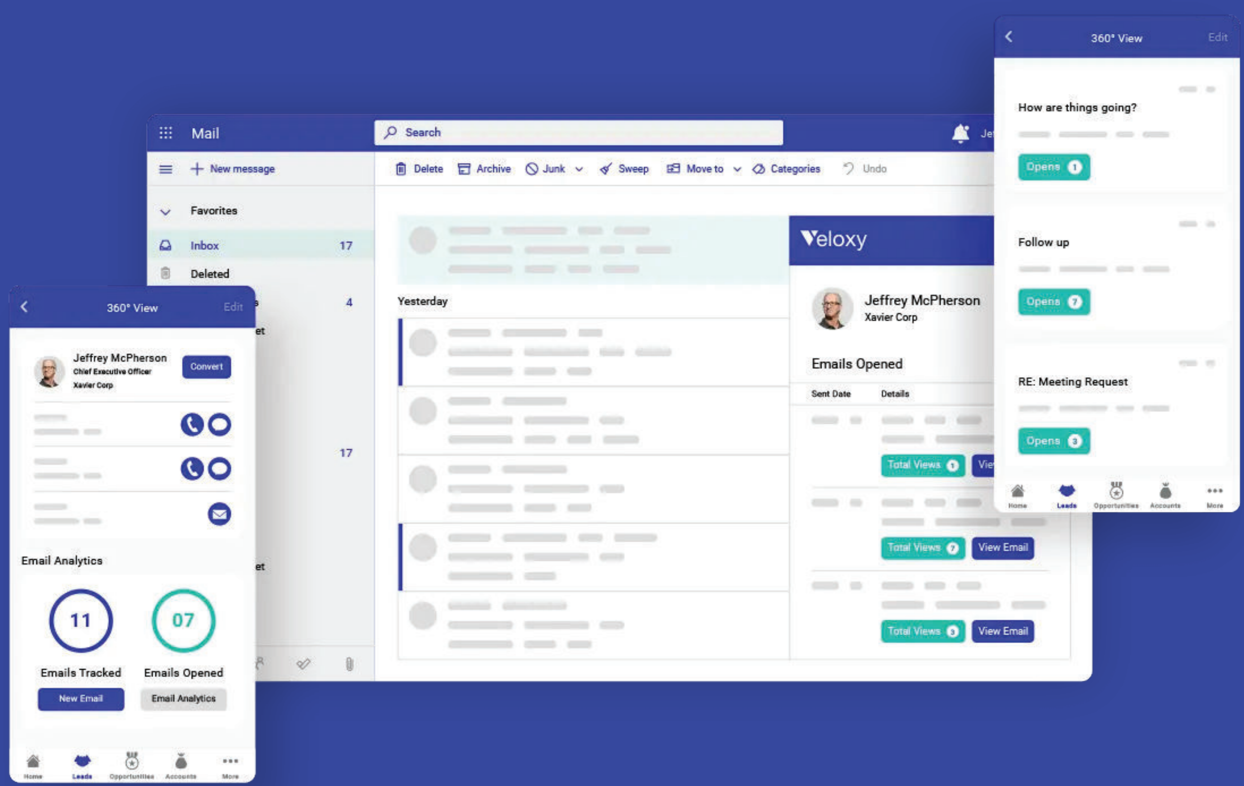


Greetings from the CEO

Did you happen to watch Squid Game on Netflix in 2021?

I thought of you when the teams were playing tug of war. If you don't assess your competition before playing, assess your team's strengths and weaknesses, and start with a strategy that your team is onboard with—you're sure to fall down and lose fast.

Today, your competition is constantly adding more technology and personnel, using more data driven business intelligence, and pivoting from a quota-focused team to an experience-focused team.

My question for you is: Have you started adjusting and getting ahead?

Whether you are or not, now is the best time to do two things. One, read this ebook and help your organization get out in front on Sales Acceleration, Salesforce Adoption, and Sales Ai. And two, start a conversation with us to get a readily applicable blueprint that will positively change the way your C-Suite looks at you moving forward.

Let us help you make amazing advances in 2022!

And please, don't hesitate to email me at samir@veloxy.io.

Yours truly,

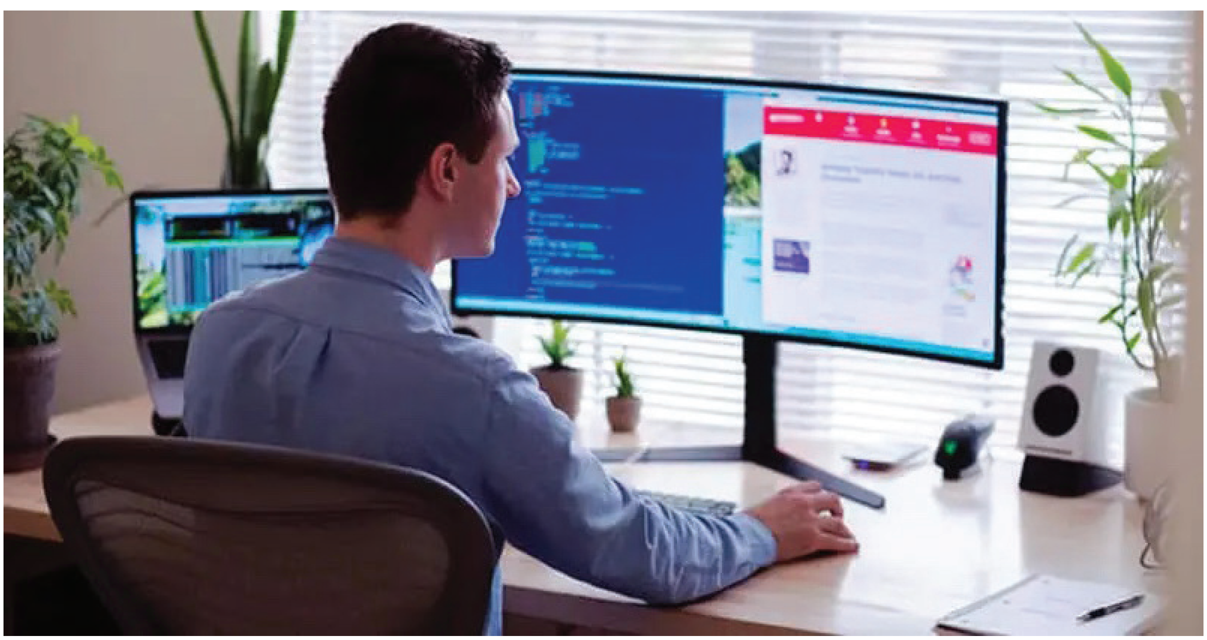
Samir Majumdar
CEO of Veloxy

How to Accelerate Sales in Today's Modern Sales World

Salesforce is arguably the best customer relationship management system for B2B companies. While it checks a lot of boxes for Sales Managers, there's still a lot of work that needs to be done to unlock Salesforce's potential to accelerate sales at your company.

Using the applicable insight and practices in this guide, you'll not only help optimize and get more ROI from your Salesforce instance, but you'll also improve sales team morale and your reputation as a champion at your company.

Because sales acceleration is an ongoing and evolving strategy, we're sharing the methods and tools that will create a true and sustainable competitive advantage for today—and for years to come.



What is Sales Acceleration?

Let's start by sharing what Sales Acceleration isn't. Sales acceleration isn't merely selling faster to sell more. Customers never enjoy the feeling of being rushed to buy, and salespeople never enjoy the feeling of being under the gun to sell.

Those two pain points, alongside the following three, are what has created the demand for a renewed approach to sales acceleration.

- Covid upended the workplace environment, field sales, and the buyer process. Some buyers are still working from home, and most face-to-face meetings have been replaced by Zoom calls. This has also created…
- Sales cycles are now digital first, creating a new competitive landscape comprised of content, analytics, and tech stacks. Because of this, sales managers and their teams believe technology is complicating sales cycles, not simplifying them.
- Customer Experience is now the number one key performance indicator, replacing sales quota. If a more complex, displaced sales cycle wasn't enough, customers now demand that salespeople deliver more value and more personal touches.

No need to fret. All of the aforementioned pain points and more can be extinguished by today's approach to sales acceleration. Sales acceleration is a straightforward, three-pronged strategy that helps customers move through the pipeline with greater speed by:

- Replacing inefficiencies with streamlined sales processes
- Simplifying complex, digital-first sales cycles with optimized technology
- Delivering more timely, valuable buyer engagements

When you step back and consider today's approach to sales acceleration, you find yourself asking a familiar question, "Is this the path to sales utopia?"

YES, by enabling sales acceleration in your Sales Org, you will not only experience higher quota, customer experience, and sales morale metrics, but you'll also demonstrate to the C-suite the predictability behind your sales success. And isn't that Sales Utopia?

Now let's dive deeper into the specific way to accelerate your sales.

How to Accelerate Sales: 7 Best Tactics

While the strategy of sales acceleration is clear-cut, some of its tactics can be evasive or too numerous to sift through. Furthemore, some tactics work better for inside sales teams than outside sales teams, and some are more market-specific than others. This is why I'm sharing the following 10 tactics that can help every manager accelerate the sales process, starting with one that you won't find anywhere else!

Use the Sales Acceleration Formula

I'm going to share with you a sales acceleration formula only known to Veloxy customers and many Salesforce users. This will not be referencing the popular book by Mark Roberge, 'The Sales Acceleration Formula', however, I would recommend you invest twenty dollars on the read. Roberge offers a very thorough, department-wide approach to accelerating sales that includes training, hiring, personnel management, sales enablement, and sales technology.

Veloxy's Sales Acceleration Formula focuses on the impact that your sales process, sales technology, and customer engagement has on your selling activity versus non-selling activity ratio:

$$\frac{\Delta \text{ time spent on selling activity} \atop \text{(total annual hours)}}{\text{total time} \atop \text{(260 days)}} + \frac{\Delta \text{ time spent} \atop {\text{manually prioritizing leads} \atop \text{(total annual hours)}}}{\text{total time} \atop \text{(260 days)}} = \text{more selling activity per day}$$

As you can see, we place a higher emphasis on the negative impact manually prioritizing leads has on your sales cycle. Using intuition, or heaven forbid an alphabetical list or randomized Excel spreadsheet, is still being used by over 20% of salespeople. When sales managers approach our team at Veloxy, lead

lead prioritization based on the data analysis of customers' propensity to buy is always our first priority—especially when it's automated and empowered by artificial intelligence.

Sales acceleration is an ongoing strategy, which is why we put together this helpful calculator spreadsheet for you to use right now.

Get Access Now: Sales Acceleration Calculator

In addition to easily calculating the aforementioned sales acceleration formula, you'll also be able to calculate our second sales acceleration formula. This formula focuses not just on how much more time you'll be spending on selling activities and your improved lead prioritization—it focuses on the length of your sales cycle.

$$\frac{\text{\# of selling hours to new deal}}{\text{original daily selling hours}} - \frac{\text{\# of selling hours to new deal}}{\text{future daily selling hours}}$$

$$= \text{fewer \# of days to new deal}$$

Leverage Automation and Sales AI

When salespeople aren't selling, they're sacrificing the opportunity to deliver value to their customer base. As you already know, the average salesperson spends over 60% of their day not engaging with customers. There are plenty of disparate solutions for this quandary, however, integrating automation and sales artificial intelligence is by far the most efficient and productive path you can take.

We enjoy referencing the findings from Salesforce's 3rd State of Sales Report because they really hammer home how much of an immediate impact automation can have on your sales team's daily activities. Imagine eliminating or greatly reducing all of these yearly numbers:

- Manually prioritizing outreach: 145 hours
- Salesforce / CRM Data Entry: 166 hours
- Researching Prospects: 187 hours
- Administrative Tasks: 187 hours
- Total: 685 hours of unproductive sales time

What would it mean to your end of year revenue goal if each salesperson had 685 more hours of customer engagement.

Feels like a personal Eureka! moment, am I right? While you're thinking about all of the positive possibilities, what if I told you that Sales AI could add a multiplier effect to that number in the form of sales efficiency?

Artificial intelligence for sales leverages machine learning, which is a set of automated methods for tracking and analyzing your customer data and sales intelligence so as to discover more valuable and timely customer insights and behavior patterns.

With those extra 685 hours of selling time, your salespeople will now know the right time and the right talking points for each and every customer. I could make the argument that your sales reps will sell more with Sales AI in the time saved by automation than they would in their original allotment of 707 hours without it.

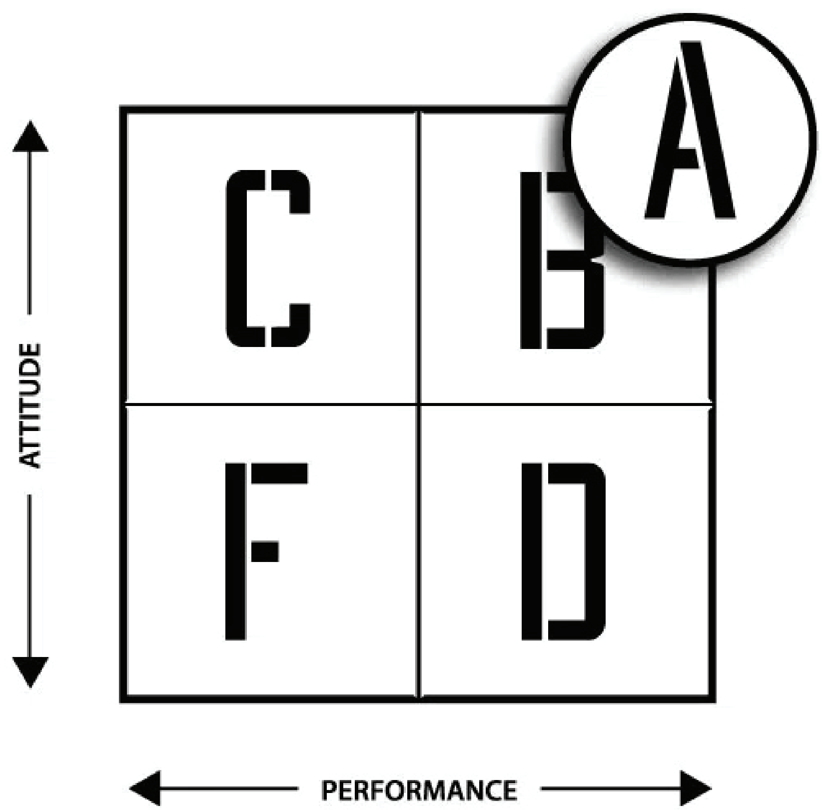
In short, automation and sales artificial intelligence helps salespeople be more themselves. Your reps are the best at creating and nurturing personal relationships, so why waste their time and limit their commissions by having them perform duties best suited for a clerk or administrative assistant? Keep your salespeople selling efficiently with automation and AI for sales.

Attract the Right Sales People

While you implement tactics to help enable your sales team with the right tools and processes, you should also look at attracting the right talent. Staff morale is one of the hidden benefits of sales acceleration tactics, however, there are still going to be people who resist change, progress, and continual improvement—and this is a problem.

Start attacking this issue by performing a sales team assessment. Like yourself, we like to keep things simple, which is why we recommend using the below chart for plotting your sales team.

- A's are force multipliers, those reps who consistently exceed quota and have a positive impact on the quota and morale of other reps.
- B's are prospective force multipliers. The only thing that may be holding them back from being an A is training, education, time, or inspiration from management.
- C's and D's are the salespeople that need further vetting, because you need to immediately separate the ones with B potential from the ones with F potential.
- F's are the ones who need to be shown the door, because your bottomline can't be impacted by potential fraggers, deserters, or other negative attitudes.



While this is not an actual sales acceleration formula, it does highlight the impact of sales personnel on revenue.

Likelihood of Acceleration = A + B + C + D + F

Imagine for a moment that A's are valued at 100, F's are valued at -100, B's at 50, and C's and D's at 0. If you had a team of 5 salespeople, and you had one of each plotted on the chart, your likelihood to accelerate sales would only be 50%. See how powerful the A's and F's can have on your sales acceleration strategy?

In conclusion, after performing your sales team assessment, work with human resources to develop a plan to attract more A's to your organization.

Survey Your Leads and Customers

In today's world of mobile apps, it's a common practice for app developers to constantly survey their customers on user experience. By doing this, they discover new feature requests, bugs that need to be fixed, and other continual improvement initiatives.

While your customer engagement is not an 'app', it is indeed a 'service' and an experience that should be continually improved. Coupling that with the fact that customers are demanding more value and more attention than ever before, you should definitely initiate a customer engagement survey to discover some of the following:

- Common and current pain points
- Outreach preferences (email, calling, texting, visitation, virtual, etc.)
- Content preferences (ebooks, white papers, case studies, webinars, etc.)
- Engagement levels (daily, weekly, monthly, quarterly, annually)
- What are we doing right?
- What are we doing wrong?
- How can we help?

The number of focal points is almost endless, which is why we often recommend to sales managers that they should let their customers dictate the talking points—especially having them define what "value add" means to them.

Now more than ever, buyers want more value-add to be initially brought to the table without pitches because they see that as a clear signal that the salesperson can be trusted with their business. By deploying the sales acceleration tactics of Sales AI and personalization, your sales team would be able to rapidly identify the right talking points and content preferences at the right time, every time. Not only does this accelerate sales, but it would give your sales team one of the strongest competitive advantages in the industry.

But what do I mean by personalization? Let's dive into that all important tactic now.

Personalize Your Outreach

There is personalization, and there is a personalized experience. Gone are the days where merging a customer's first name and company name bore fruit for sales teams. Customers are too smart to fall for that, even when their name is used in email subject lines or static photos.

Mass email blasts used to work. Then IT teams built smarter barriers. Then email companies got smarter to improve deliverability. But then the email recipients' personal demands outpaced any improvement in engagement. Salespeople were about to give up, until the introduction of personalized experiences replaced basic personalization.

What do I mean by personalized experiences? Creating content and talking points that are so focused on the customer that they'll actually think you typed out their first name and company name—when you really didn't.

Thanks to the proliferation of sales intelligence and artificial intelligence, sales teams now have the power to group their customers into tighter clusters. Here are three ways you can create personalized experiences at scale:

- Linkedin Sales Navigator: Take something that many of your customers have in common, such as industry. Search their LinkedIn activity to find common talking points, such as hiring trends, new regulations, industry events, and launch a drip campaign that speaks to it in a very detailed manner.

- Linkedin Sales Navigator: Take something that many of your customers have in common, such as industry. Search their LinkedIn activity to find common talking points, such as hiring trends, new regulations, industry events, and launch a drip campaign that speaks to it in a very detailed manner.
- ZoomInfo: Using a sales intelligence tool like this that allows you to go deeper into the happenings at companies, as well as their Org Charts, can not only help your messages seemingly read the mind of your customers, but it greatly increases the chance your messages go viral across the account.
- Veloxy: Having a 360° view of your account and contacts prior to a meeting can help tailor your talking points around recent and relevant intelligence not found on LinkedIn or Zoominfo. On one screen, you can access everyone's social media posts, individual email engagement levels, and past and current engagement tied to opportunities.

By personalizing your experiences with customers, while also doubling or tripling the amount of time you spend with them, will only further your acceleration efforts.

Focus on the Right Dashboards and Reports

Of all the non-selling activities that keep salespeople from engagement, sales meetings are what managers are most reluctant to scale back on. This of course is for good reason, because they can work with their reps on prioritizing the right pipeline activities and strategizing on how to close more opportunities.

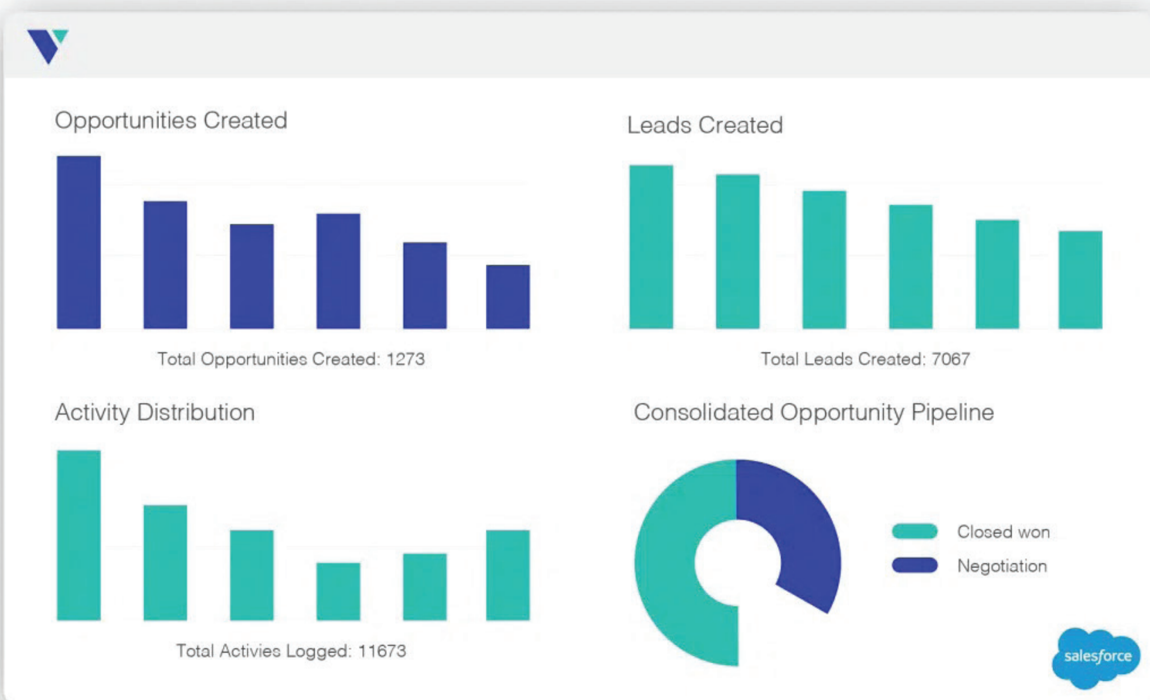
But what if you're looking at the wrong reports, and you're spending too much time sifting through the numbers?

The customization found in Salesforce dashboards and reports is otherworldly. However, this happens to be one of its most common pain points, as most sales teams spend too much time fixing reports and filtering a report's results.

To properly accelerate sales without scaling back on sales meetings, you need the right dashboard and reports with the right decision-making details. Going back to the artificial intelligence tactic, imagine how powerful a sales meeting becomes when your surface-level dashboards and reports are accompanied by buying signals. This hyper accelerates the process of identifying who to engage with and why during a sales meeting because it removes a lot of the festering intuition and guesswork of years past.

With Veloxy, all users have an optimized dashboard and set of reports customized around some of the most successful sales managers and Salesforce users in the past decade (see the previous tactic on surveying customers). Not only do Veloxy users spend less time on meetings that take them away from customers, but they also seize the use of too many static spreadsheets.

Furthermore, Veloxy dashboards and reporting are accompanied by guided selling—specific best practice engagement recommendations based on historical data. This acts as a virtual sales manager assistant for reps because it offers the same advice without interfering with their engagement timeline. This not only makes the rep's job easier and efficient, but the manager's as well.



Collaborate with the Marketing Department

In the past 20 years, there has long been a disconnect between sales and marketing on what makes a marketing/sales qualified lead. Rather than mending fences and moving forward, this disconnect can persist for not just a few years, but decades. It evades the attention of many sales managers, not to mention the C-suite.

Here's the key to collaborating with marketing. Start by sharing the sales acceleration formulas with a marketing colleague, and ask, "I would like to demonstrate to the C-suite that marketing plays a key role in accelerating sales—what's missing from this formula that can represent your team's role in generating more revenue, faster?"

This is all about ownership, as well as collaboration. You're not stepping on toes. You're not saying that you can't find a way to plug in marketing's role. What you are saying is that you value marketing's role in accelerating sales, and you want to take an extra step toward building a stronger collaborative relationship.

Secondly, ask a marketing colleague this, "Do you have 15 or 30 minutes this week? I'd like to share with you a series of data-driven insights and other customer intelligence discovered by some of our sales solutions. I'm confident you could use this for marketing campaigns."

Not only does marketing want to be more involved with the sales process from start to finish, but your customers want access and value from more points of contact than just sales. In addition to marketing, both B2B and B2C customers welcome receiving value from customer service, product management, and a variety of other industry-focused departments.

How to Accelerate B2B Sales: 4 Best Tactics

Let's narrow our focus to B2B, shall we? Moving aside tactics for process, all B2B sales teams need to check off four boxes in order to truly accelerate sales in today's digital-first world. These four boxes include sales enablement, sales productivity, Salesforce adoption, and sales engagement. By not optimizing just one of these key components, your sales team will fail to accelerate sales to the point of company-changing revenue and life-changing recognition. Let's start with the process that gets the most attention.

Accelerate Sales Enablement

As you and I both know, sales enablement is the practice of giving your sales team everything they could possibly need to succeed on an efficiency level. This is a combination of the "right" technology, the right training, the right content, the right data access, and more. The reason this process gets more attention than the other three is because sales enablement can take up, on average, 10% of company revenue.

Now that you've picked up your jaw off of the floor after contemplating what 10% of fifty million dollars is, what do I mean by "right"? Not all tools and content is right for your salespeople, let alone your customers. You should be looking for "sales enabled" content, tools, and more. For something to be truly considered sales enabled, it has to make each of your reps' sales process more intuitive and streamlined so as to predictably maximize usage and sales morale.

Here are three critical areas that need to be sales enabled for accelerating sales:

- Sales enabled CRM: By itself, a customer relationship platform isn't necessarily sales enabled. The original Salesforce is a prime example of this because salespeople saw it as an Excel workbook with nice aesthetics that also acted as a spy tool for sales managers. You and I both know that neither of those perceptions were accurate, however, the perception on the part of the salesperson should never be ignored. This is why truly sales enabled CRM, especially Salesforce, needs to be automated, extend itself to a sales person's devices, and it should allow a certain level of autonomy.
- Sales enabled Engagement: CRMs like Salesforce can't help a salesperson engage with their customers, nor can it help improve one-to-one relationships. Sales enabled engagement platforms that integrate with your CRM can, because unlike stand alone tools like email marketing and marketing automation software, engagement platforms can rapidly scale intelligent outreach on a personal level. This is why truly sales enabled engagement, especially Veloxy, needs to have access to real-time buyer signals and guided selling to improve response rates and conversions.

- Sales enabled Productivity: This is where the efficiencies gained are turned into results, aka sales, aka revenue. All process improvements should be aimed at maximizing selling activity (most notably closing deals) while minimizing resources spent, such as time and cost. If a process, solution, or even a salesperson is offsetting the ratio of sales to expenses, it needs to be addressed and either optimized or remedied immediately. This is why truly sales enabled productivity is commonly accompanied by streamlining.

Now that you're ready to tackle these three critical enablement areas, let's dive deeper into each one.

Accelerate Salesforce Adoption

Death. Taxes. Salesforce adoption challenges. Sales managers have experienced this certainty the past 20 years with varying results when presented with solutions. While the age and tech familiarity of salespeople used to be the most common cause of a lack of adoption, the balancing of selling with admin tasks and data entry associated with Salesforce has taken over as the number one deterrent.

It's one thing if the admin tasks and data entry made up a percentage of a salesperson's day during work hours, however, most salespeople working to meet quota are postponing these adoption barriers until they get home. This not only creates a negative impact on employee morale, but the spouses and partners of the salesperson aren't too pleased either.

There is no question about it. Salesforce is the most powerful CRM on the planet. With that being said, they leave some of the responsibility to the end users, such as sales staff, marketing staff, and even IT staff who can add their programming talents to customize the platform's integration into the organization and its tech stack.

But what if over 75% of all Salesforce users are from small to medium sized businesses that don't have either the manpower or time to invest in full customization? This is where Salesforce automation comes in to accelerate adoption and sales acceleration.

Salesforce automation is a feature of an application, or set of applications, that automates time and resource-consuming tasks such as data entry, lead prioritization, proposal generation, and more. Some automations are triggered by clicks, events, or triggers such as saved records, while others are constantly running around the clock with no involvement from sales staff.

When Salesforce is automated by Veloxy, for example, our users experience a 200 to 350% increase in selling activity, not to mention more free time when they get home, too. Salesforce automation defines efficiency gains, and now I'll share how those gains can extend to actual customer interactions

Accelerate Sales Engagement

While data entry is an inhibitor to Salesforce adoption, looking up prospects, manually prioritizing outreach, writing and sending one-off emails, and engaging at the wrong time are all frequent inhibitors to sales engagement.

Luckily for you and your sales team, Salesforce isn't the only resource that can be automated. Sales engagement platforms are now being driven and differentiated by artificial intelligence capabilities made specifically for salespeople.

Picture this. You start your day at 8am. You turn on your computer and smart devices. Staring back at you from all of your devices is an optimized list of leads and customers that are subconsciously expecting you to engage with them at recommended times (by subconsciously, we're referring to Sales AI learning when customers are more open to engagement). Yes, sales engagement with artificial intelligence is kind of like having a crystal ball.

Without hesitation, your salespeople will maximize their daily engagement while also reaching the right contacts at the right time, every time.

You save over 160 hours a year by not manually selecting people to call. You send templated and personalized emails at the time each unique buyer is active in their inbox. And when you do want to look up a prospect, all of their and the account's actionable information is on one screen.

This is the way sales engagement was meant to be, and a missing key component for accelerating sales productivity.

Accelerate Sales Productivity

If your sales team is empowered with everything they need to succeed, and two of those components—Salesforce and their sales engagement solutions—are fully optimized to maximize selling time, you are hereby accelerating the productivity of your team.

There is one unique way to further maximize your team's sales results that most organizations are failing to achieve.

Your goal should be to consolidate your sales technology footprint. Here are some polarizing statistics on technology stacks:

- companies can use anywhere from 40 to over 200 applications at any given time.
- companies with fewer than 50 employees use 40 applications on average.
- sales either leads in application spend, or merely trails engineering.
- individual employees use anywhere from 7 to 10 applications.

There are two problems found in these statistics.

First, there is an overwhelming sense of urgency to build the largest and most powerful technology stack. If there's a trending application getting all of the buzz, rest assured it's finding its way into your stack and the stack of some of your competitors. What these organizations are failing to realize is that this cripples user adoption and return on investment, creates stranded and unused applications (that are still being paid for), and an overall sense of unfulfillment.

We call these technology stacks 'leaning towers', because unlike the Leaning Tower of Pisa, they're sure to fall over and take your productivity (or lack thereof) with it.

Second, influenced by the first problem, many organizations mix-and-match applications. For example, they'll choose three applications that fall under the 'Sales Engagement' category because one has a virtual call recorder, another has personalized email cadences, and the third has geolocation leadfinding. We've seen this occur hundreds of times, where sales reps cannot agree on using one application for sales engagement, which then doubles or triples the manager's job of onboarding him or herself to each application.

As we can agree, the fewer screens your sales team has to familiarize themselves with, the better. If you need help choosing an optimal sales technology stack for your team, please reach out to us.

Conclusion on Sales Acceleration

We just shared a lot of helpful advice that can be used by Startups all the way up to Enterprise level companies.

If you'd like a free consultation on sales acceleration, please reach out to our Sales Acceleration Director, Jeff Grice at jeff@veloxy.us

The Role of Artificial Intelligence in a Modern Sales World

As you and I both know, there are thousands of professions that require a human touch. Sales is near the the top of that list. In order for salespeople to succeed, they must be proficient at establishing and nurturing value-driven relationships.

The question now becomes, how does Sales Artificial Intelligence fit into all this?

Does it really play a vital role in sales?

Well, there are numerous ways that AI for sales can benefit a sales team. These include accelerating lead volumes, closing rates, and overall sales performance.

Does Artificial Intelligence in sales replace salespeople?

No. In fact, sales teams leveraging Sales AI are actually hiring more salespeople due to hyper efficiencies and more revenue.

Try to think of it like giving sales reps the insight and tools they need to work smarter, faster, and easier. For you the sales manager, this means forging better working relationships with salespeople and enhancing their ability to hit quotas consistently.

Thanks to Sales AI, sellers are also streamlining their workday and receiving automated and actionable customer intelligence. This turns a sales rep who spends too much time on non-selling activity into a trusted advisor that spends the majority of their time on customer engagement.

Who is Using Sales AI?

Forward thinking companies are already catching on fast. Salesforce's state of sales report shows that sales leaders expect their AI adoption to grow faster than any other sales related technology. Salesforce also highlighted that high performing teams are almost 5x more likely to be using AI than those underperforming teams.

If you're looking to increase the adoption of AI into your business, you can read all about it in our post, Getting Your Organization AI Ready.

But here's the fun part. Artificial intelligence in sales is actually not replacing people. As a matter of fact, a vast majority of these high performing companies are also planning to increase their workforce.

The reason for this is simple – AI is creating practical value by augmenting, automating, and supercharging how they work. And this is with tons of real-world use cases and tools already in use today. Unfortunately, there seems to be so much hype around AI that a lot of sales leaders often miss out on this fact.

Of course, we can't rightly blame anyone. After all, the reps have quotas to hit and there's currently too much commentary of AI being aspirational as opposed to practical. In this pillar post, we'll be sticking purely to the practical.

We'll outline a working definition of Sales AI as well as what role it plays in sales.

We'll see how artificial intelligence is helping sales management and enablement. We will also check out some sales forecasting and automation software that use AI, and more misconceptions on AI. So buckle up and prepare for one super informative, all inclusive guide to all things Sales AI.

What is Sales AI?

Sales AI is any software that makes use of artificial intelligence to make sales teams more effective and productive. This includes tools designed to reduce the administrative burden on revenue operations and reps by automating non-selling activities. Some functions that benefit from Sales AI are sales forecasting, tracking and analyzing contact relationships, pipeline management, data entry, and much more.

Generally, artificial intelligence is an umbrella term covering a wide range of different technologies. These include computer vision, machine learning, deep learning, natural language processing, and much more. However, all these technologies help machines perform specific cognitive tasks just as well or even better than their human counterparts.

Take AI powered computer vision for instance. It helps self-driving cars to identify and avoid obstacles, just like our trusty eyeballs. And your favorite voice assistant (Siri or Alexa) also understands your words and responds using artificial intelligence.

So while there are a ton of different types of AI, the most essential point is that the term Artificial Intelligence refers to the use of machines to automate activities otherwise performed by humans. Sales AI can and will impact your career in sales, but always in a good way.

AI in Sales

Sales AI is a form of machine learning and execution that powers some of the most impressive sales capabilities. Predictive Sales AI, for example, constantly analyzes the sales activity of individual salespeople, proactively guiding the sales process and signaling the best time to perform outreach.

Unlike traditional sales software that presents data as it becomes available, Sales AI analyzes new and old data over time, exponentially increasing the likelihood that you'll satisfy your customers and shorten their sales cycles.

So with sophisticated enough AI, you can analyze prospect and customer data, predict which of them is more likely to close, recommend the most effective sales actions to carry out, forecast results, optimize prices and much more.

Don't believe me? Well, Harvard Business Review estimates that AI can create about $2.5 trillion of value in sales

How is AI Changing Sales?

With all this talk about artificial intelligence, let me be clear on one important point. The power of selling will never move away from human interaction. Sales AI drives this point home by automating the non-selling activities that take salespeople away from human interaction. In fact, AI has literally obliterated several of these non-human sales functions.

Here are some of the other changes AI is making in sales.

a) Dropping Sales Costs
By simply automating non-selling activities with AI, sales teams are greatly lowering the time and cost associated with each sale. That's because sales reps are spending the vast majority of their time on the activities that produce sales, and less time on those that don't.

b) Decrease in Call Times
Since AI can help identify needs and align solutions, sales reps require far less discovery and questioning during their calls. According to research, call times have actually dropped by as much as 70% thanks to AI.

c) Rise in Leads
The same business review from Harvard shows that sales teams that adopted AI increased their leads and appointments by as much as 50%. That's because AI powered machine learning has taken on time consuming tasks of connecting and qualifying leads as well as follow ups and relationship management.

d) Increased Personal Touch

Here's one of the more covert impacts of AI in sales. Sales leaders predict that customers will manage as much as 80% of their relationships without the involvement of salespeople. But at the same time, salespeople will be more available for said involvement. That's because AI will be handling mundane tasks which take up a lot of time for reps, leaving them with more time to engage with prospects and clients.

e) Automated/Visual Management Styles

Interestingly, sales managers' roles tend to change as they adopt more and more AI capabilities. Since machine intelligence can progressively gather more performance data, recommend solutions, and make day to day decisions based on data, management doesn't have to sift through hundreds of reports and spreadsheets to get actionable insight. This automation translates to managers rapidly making the right decisions at the right time for their sales teams.

Role of AI in Sales

We've already established that AI helps sales without replacing human sellers. In addition to improving overall performance of your sales team, it also provides curated data for management. This helps with prospecting and smoother decision making.

For marketers, AI allows for driving revenue, scalable growth, and a personalized customer experience. More and more marketing experts are realizing the value and power that AI brings.

But how exactly does AI help with sales management and enablement?

How is AI Helping Sales Management?

i) Integrating AI in the Sales Process
Successful executives and sales managers don't waste the limited and valuable time of their workforce. Businesses have already invested heavily in hiring, training, and developing their sales force. But with automation creeping in quickly, there's no fighting the incoming changes.

This is why sales managers need to use their organizational culture, experience, and ethical reflection. Sales leaders won't have enough time to develop their staff while teaching them new skills. But by leaving unique sales and planning functions to AI, they can work smarter and faster along with their workforce.

ii) Streamlining Big Data
Any business model today is seriously flawed if management does not prioritize the gathering and analysis of data. Remember, AI doesn't happen in a vacuum. The application of data mining techniques and machine learning requires increasing amounts of data. As such, successful sales managers make their teams data driven by collecting and utilizing economically feasible sales data points.

If you do not possess essential data or maintain it properly, then your decisions will be based on unreliable and highly incomplete CRM data. AI has really helped sales managers in terms of gathering and consolidating big data. However, this is not a one-time thing. Gathering and sieving through data is an ongoing process.

iii) Sales Managers are now Data Scientists
When it comes to sales context, AI is simply data science on steroids. As a result, sales managers have had to understand, discuss, and explain different data analysis methods. The most successful sales leaders not only grasp the basic principles of AI, they can also envision and appreciate more opportunities.

This makes them more than willing to invest in their people and data as well as supply the necessary resources to do so. Sure, AI in sales does have a risk of becoming just another buzzword. That's why executives must set clear goals to their data science teams and make sure they get a solid return on investment.

How is AI Helping Sales Enablement?

Sales enablement equips your sales team on three primary fronts. These are delivering engaging content, prospecting, and building team competency. We've touched on all this and more in our past posts and on our sales enablement page. With the introduction of sales AI, these three areas have gotten a significant boost.

i) Delivering Engaging Content

After gathering a lot of data on prospect behavior and customer intent, you can make use of AI to personalize the info. This will help you develop, craft and pull relevant content depending on which stage of the sales cycle your prospect resides. You can then repurpose and format the content to align with your buyer preferences.

In addition to offering customers predictive insights, a fully configured AI also gives you access to buying propensities. This means AI gives you recommendations regarding the scope subject, length, style, timing, and content frequency. When it comes to creating and personalizing content, artificial intelligence in sales is a must.

ii) Prospecting

There's no doubt about it – AI definitely makes prospecting more efficient. Sales AI can create highly detailed buyer personas (and sales personas as well) by analyzing a sample of existing customers based on the parameters you set. With these personas, it will then help you find other matches.

In addition to analyzing more sophisticated qualifiers like sentiments, personal values, and ethics, AI engines can work with basic data like the prospects behavior, location, peak activity times, and demographics. All these allow sales reps to engage more actively with leads and prospects that are more likely to convert and drive revenue.

iii) Building Competency and Team Productivity

We've already seen how Sales AI can relieve hundreds of man hours by automating various activities. For instance, the right tools can mine organizational email, workflow, calendar, and other apps to automatically populate CRM.

When it comes to competency building, AI will analyze a sales rep's performance or manager's coaching proficiency to identify behavioral aspects. An AI powered sales enablement tool will go a long way to guaranteeing the time spent by the rep in the field is spent productively with the most profitable prospects.

AI in B2B Sales

Early on, marketing and sales departments were the first to adopt digital transformation. That's because the digital context expanded the touch points that they could use to personalize engagement. This same transformation has been especially useful for B2B sales teams since they typically have longer high touch sales cycles.

Steadily, Sales AI is changing the expectations of B2B sales performance. According to research, those B2B sales teams that outperform the rest are the ones willing to shake up their sales model and welcome next-gen capabilities. This has seen savvy B2Bs grow at twice the rate of GDP.

Your typical B2B sales rep carries out hours of research before reaching out to prospects. AI turns that process around by giving the rep valuable prospect intelligence. See, even though marketing might have intelligence based on analysis, it's tough to beat the speed, accuracy, and efficiency of Sales AI.

Here are more reasons you need Sales AI in B2B sales.

- AI tools help optimize resources on highest value prospects
- New layers of data are added thanks to machine learning
- AI fuels a continuous feedback loop

Predictive Sales AI

As the name suggests, predictive sales AI makes use of statistical models and computer algorithms to analyze extremely large sets of data and assess the likelihood of different potential outcomes. The models are drawn upon the contextual, current, and historical data for the probability of a future event actualizing.

Naturally, the system incorporates more information into the model and updates predictions accordingly as new data is made available. This process keeps on happening and the machine learning model gets smarter by making its predictions that much more accurate.

Unfortunately, these models are never infallible – they tend to experience problems that many data scientists are all too familiar with. And that's data limitations. Some of the applications of predictive analytics for enhancing sales and marketing ops include:

- Streamlining the sales cycle
- Optimizing lead scoring
- Providing timing information and sales messaging
- Identifying cross-selling and upselling information

AI Sales Automation

This is defined as an intelligent system that automates redundant sales processes to make it more efficient, error free, and effective. In the process of generating and qualifying leads, nurturing prospects and converting them to promising contacts, there are several labor intensive actions that are crucial.

Sales automation software simply isolates these repetitive actions and automates them with technology to save time and effort. Some examples include meeting scheduling, weekly reporting, and proposal reminders.

AI for Salesforce Automation
Salesforce automation is the process of automating sales activities to help sales teams in their daily operations of data, opportunity tracking, leads management and sales conversions. All this includes time consuming and monotonous tasks associated with data segmentation, data entry, prospect allocation, and other menial chores.

AI Sales Prospecting

Hands down, we can easily can 2020 the year of accelerated automation. We've seen lots of tool for automating prospect list building and outbound outreach to help companies generate new customer data, scale sales and save time. Some of the best tools can crawl the web to find niche leads, identify companies that exhibit ideal customer features and extract their company data to boost sales pipeline.

They can also use AI to turn cold calls into hot ones by opening source data and identifying buying signals. Similarly, AI sales prospecting allows reps to use machine learning to match missing data from your sales contacts and open source data on the internet.

AI and Geolocation for Prospect Discovery

Sales prospecting is the first step in any sales process. It helps search and identify potential customers for the purpose of creating new business. One of the most crucial elements or data for prospecting is Geolocation.

With information on where your prospects are located, it's easier to cultivate a dependable and reliable database of people interested in your products or services. The question now becomes, how do you gather the relevant information to boost your database and make work easier for your Salesforce?

AI Sales Forecasting

According to research, four out of five organizations struggle with sales forecasts often getting them wrong by over 10%. This leads to mistaken investment decisions, stock issues, or a lack of salespeople. But when used right, sales forecasting will help business leaders make smarter decisions when defining budgets, goals, and hires.

The smart combination of AI and data analytics has helped businesses improve forecasts. Artificial intelligence in sales helps create predictive models and examine datasets to reveal factors that impact profit. Overtime, machine learning algorithms have allowed software to train and improve data. What's more, AI powered software can equip sales forecast with related data such as traffic or weather.

With AI sales forecasting, there are numerous areas that can be impacted. These include ecommerce and retail, manufacturing, banking and financial institutions, plus many more. All these can benefit from forecasting by enhanced accuracy, improved processes, and solving stock out issues.

What is AI Sales Assistant Software?

Also referred to as virtual sales assistants, AI sales assistant software helps sales reps by automating several different tasks using AI. Essentially, there are two categories of Sales AI. These are sales bots high automate the prospect outreach process and qualify leads.

The second category is internal sales focused sales assistants which focus only on conversational sales interfaces to assist reps in finding answers about sales leads and analytics. These Sales AI tools help marketing and sales departments to save time and energy on routine tasks so they can spend more time on higher level sales activities.

With the right AI sales assistant such as Veloxy, you can eliminate repetitive outreach, close more deals, and keep your sales team focused on solely generating revenue.

Misconceptions about Artificial Intelligence

Understanding AI is never easy – at least not with myths and inaccuracies about it being rife. But since artificial intelligence is steadily becoming a part and parcel of both life and business, everyone needs to learn more about it. In this segment, we debunk some of the most common myths and misconceptions surrounding artificial intelligence.

The Future of AI for Sales

In our previous post on Business AI: Assistant or Replacement, we had a close look at how successful integration of AI was more than just automation. A lot of the AI processes were about upskilling and workforce empowerment. This is what the future of work looks like in the age of AI.

i) Upskilled and Enhanced Workforce
Businesses need to evolve the way their workers view AI to guarantee a silky smooth transition to artificial success. As opposed to fearing AI, it's all about getting your team members to adopt it as you read in our AI adoption post.

In his book (Human+Machine), Jim Wilson talks about how the new AI era will be marked by increasingly broader levels of employment. So while machines will take over high volume tasks such as calculations and other routine works, abstract tasks involving judgment, creativity and inspiration still require organic intelligence.

ii) Increased Productivity Boosts
Artificial intelligence allows humans to be more productive than before at the most general level. For instance, AI can continually analyze troves of data to understand customer priority, draw patterns and predict needs. A huge company could take weeks to analyze large sets of data that AI systems can knock down in a matter of hours.

iii) Broader/New Job Markets for the Missing Middle
Naturally more and more companies will need to ensure they can accommodate new skills and talents as they continually adopt AI. Research shows that an immense number of emergent roles will be taken up by the missing middle. This term refers to the dynamic space where man and machine collaborate in total symbiosis working towards a common goal.

Some of these new roles could include highly qualified trainers to teach AI systems how to perform with minimal errors. Others like explainers will be essential to explain the inner working of AI to non-technical staff. Similarly, you'll need sustainers to ensure the artificial intelligence systems maintain responsible use and operate properly to make life easier, not harder.

Conclusion on AI for Sales

To outperform the competition in this AI rich environment, it is of the utmost importance for businesses to start developing upskilling strategies while they still have time. Failure to fill up the 'missing middle' could lead to a persistent and harmful shortage of skilled labor in the market.

There's already plenty of research that shows why businesses which commit to getting their workforce to collaborate with AI have more chances of success and long term viability to survive upcoming AI disruptions across various industries.

How to Automate Salesforce CRM in a Modern Sales World

Salesforce Adoption Pain Point #1: Sales representatives report spending 66% of their day performing tedious, non-selling activity in Salesforce.

This is a conundrum for most sales managers, as sales productivity is one of the common selling points of the Salesforce CRM platform.

How are you expected to deliver Salesforce ROI to the C-Suite if your sales team is spending most of their time on data entry, manual pipeline management, and Salesforce minutia—that is to say if they're even using Salesforce at all. Non-selling activity also slows down onboarding and urgently limits the platform's effectiveness.

As a manager, how can you improve Salesforce adoption, performance, and ROI?

The key is Salesforce automation.

When you automate the Salesforce platform, it's easier than ever to use—for you and your sales team. Automation saves time, and increases data accuracy, sales productivity, and revenue growth.

You're about to learn everything that you the Sales Manager needs to know to reap the benefits of Salesforce automation—especially strengthening your reputation as the MVP in the company.

Timesinks Waste Sales Rep Potential

In sales, nothing matters as much as prospecting and closing. In a battle of priorities, it's those two tasks vs everything else.

The best sales reps hone interpersonal skills that software can never replace. Persuasive conversational skills are valuable.

Why waste that value? Researching prospects, sifting through huge swaths of data, and re-typing reports is NOT necessary.

Salesforce: A Brief Overview

Salesforce is a premium CRM platform. This cloud-based software program improves sales strategies across the board, and it simplifies many elements of the sales process.

With Salesforce Automation, you could realize the following benefits daily:

- gives teams a shared view of customer data
- improves collaboration across the Org
- facilitates alignment across the Org
- sales practices better align with sales goals
- improves sales workflows
- enables clear communication and easy information sharing

- lets teams analyze task dependencies to discover bottlenecks
- improves lead generation and sales engagement
- improves customer acquisition speed and strategies
- leverages data to optimize marketing strategies
- builds better customer acquisition funnels

What Sales Manager does't want all of these benefits and more?

With these sales capabilities, the average company sees a return of at least $2.50 for every dollar it invests in Salesforce.

Yet, some companies see greater success than others. What limits companies' experience of Salesforce CRM?

Salesforce Drives Exponential Growth—In Theory

Salesforce gives companies the potential for exponential growth. Yet, most businesses aren't reaching that potential.

A company can't thrive with Salesforce if team members don't use it. And, its insights are less effective when teams use them inconsistently.

Sales team members might input incorrect information or miss out on key features or AppExchange apps if they're uninformed. So, delivering that information is critical to optimize Salesforce use. At the same time, you'll need to make the information stick.

To do this well, learn about challenges that prevent full Salesforce adoption.

Which of the following Salesforce barriers might your team face?

Salesforce Adoption Barriers and Challenges

You might be unsure if Salesforce is right for your team. Or, maybe your company has already invested significantly in the software, but your team just isn't using it.

As you know, Salesforce is a data-driven platform. It uses the cloud to work with large swaths of data without impacting your bandwidth. Yet, this data can be hard to parse correctly.

Some team members resist onboarding because they feel overwhelmed by the data. Others are missing critical, advanced data literacy skills. This hampers their attempts to navigate the platform.

It's easy to fall back on old habits. Fortunately, slow Salesforce adoption doesn't mean adoption is impossible.

For most teams, slow adoption signals a struggle with one of the following six barriers. Any of these hurdles can make Salesforce onboarding a challenge.

1. Salesforce: Inconvenient and Inaccessible?

Even though Salesforce is cloud-based, some users find it hard to access. Ideally, a sales representative can update the program in real-time, from wherever they are.

In practice, the Salesforce mobile app isn't intuitive for everyone (but this 5-star AppExchange app is). Salesforce mobile's user interface doesn't always communicate functions in ways users are used to.

It's easy to fall back on old habits, and mentally reference programs we're more familiar with. It's harder to take a systemic approach to learn a new sales app interface.

This can make new users' experience with Salesforce unsatisfying. As a result, users return to noting information in applications they understand, such as Microsoft Excel. This is especially true when they're away from their desks or at home.

If you can successfully integrate Salesforce with apps your team knows better, they'll use Salesforce mobile more often. Without that, though, the program remains inconvenient.

2. Data Concerns: Consistency, Security, Depth

Some sales reps worry about the data CRM programs like Salesforce handle. In almost every survey of new Salesforce users, they're concerned about data security.

This mirrors evolving security concerns globally. The demise of third-party cookies shows how serious users' privacy demands are. They also want groups that handle personal data to act transparently.

In many respects, client-lead data is more valuable than typical user data. So, representatives scrutinize platforms' security measures.

Salesforce's forecasts and strategies are only as good as its data. If team members hesitate due to security worries, data will be inconsistent.

Then, there's the problem of the sheer volume of data. Certainly, breadth is good. Yet, some users worry this comes at the expense of depth.

Does skimming the surface of customers' information grant any worthwhile insights? Or, can you enable Salesforce to go deeper than that?

3. Aggregation Challenges

Salesforce can aggregate data to different levels of granularity. That is, it groups data into readable sets with varying levels of detail.

Mastering these options can be challenging for some users. There are barriers to parsing the data as its presented. This is particularly true when users want to act on data quickly.

Aggregation challenges stem from ignorance. What data sets are right to use? Which parameters get you the information you need?

Input difficulties contribute to these challenges. How can team members best ensure accuracy at different levels? Should they take specific variables into account when they look at a "zoomed in" set?

Representatives might ask how Salesforce gets the data. And, how does it make grouping decisions? Without a grasp of the program's logic, it's harder to work with.

4. Synthesis Questions

Salesforce works from massive quantities of information. Then, it makes choices.

CRM programs sift through information. They bring together disconnected data. Then, they display what's relevant.

Without Sales Artificial Intelligence, sales team members have to teach Salesforce how to make those decisions. This "teaching" can be daunting.

Moreover, how does manually teaching Salesforce impact your team's approach to information input? Or synthesis, for that matter?

To resolve synthesis questions, make a "roadmap" of Salesforce's logic. Then, look at your team's strategies and goals. How does Salesforce fit into the roadmap?

Answering synthesis questions is about stakes. Stakeholders see how the program aligns with their goals.

An effective team understands this alignment. They know exactly what they are doing with this software. They know how each Salesforce task fits into a larger process. They know that process fits with the broader goal.

If you can make these connections, this understanding underscores their work.

5. Information Enrichment

You need to enrich data. This is not intuitive with Salesforce.

Without enrichment, data is hard to use effectively. Even when your team can parse information well, the application isn't obvious.

Team members may balk at the default enrichment processes. How much time are they saving with Salesforce? If they enrich all data themselves, it feels like one tedious task was replaced by another.

It's worse if they don't have a basis for enrichment. Do they have to hunt down enrichment information? Who can they get it from?

Yet, poor data enrichment can make Salesforce seem useless. If it's ineffective, it's not worth the trouble. So, onboarding stays challenging until you resolve these issues.

6. Context-Oriented Barriers

Context is a key part of enrichment. It's also critical to effective data use.

How does your team know what context is relevant? Context can mean any point of comparison.

How does one data set measure up to known goals and targets? How does a new lead compare to existing clients?

Context confusion is a huge barrier to adoption. It's also important that users know where to gather context data.

And, they need to learn how to gather context data effectively. What data-gathering tools are useful and trustworthy?

There's also another side to context barriers. The sales representative's context matters.

How much prior Salesforce or CRM knowledge do they have? What baseline are you working from when you onboard?

If you understand your team's context, you can persuade them to use Salesforce wisely.

Just Another Time Drain?

Sales team members find these barriers offputting. These challenges make Salesforce seem cumbersome. It's hard to say the work will pay off when you haven't yet done the work.

Yet, so much of the work that makes Salesforce a success isn't sales fundamentals. It's not your team's greatest skill set.

Instead, Salesforce requires research. And, it demands repetitive data-entry tasks. This can make the platform even more uninviting.

The highest ROI projections can't get anyone's time back. But, Salesforce's monotonous tasks don't inevitably discourage use.

Salesforce Automation Breaks Adoption Barriers

Automation drives businesses forward. Ravin Jesuthasan, a committee member in the World Economic Forum, notes most businesses aren't preparing for the next decade wisely.

Companies that embrace automation win the race to the future. Jesuthasan's research shows organizations do well when they divide work into task types.

Is a given work-task repetitive, or does it vary? Is it largely independent, or does it involve collaboration? Does a worker use their body or their mind?

The key is, let your team skip the monotony. Use automation.

Dividing these tasks lets managers use automation to augment each team member's abilities. This lets you build each job to suit your teams' strengths.

For a sales team, automation can augment most tasks, especially non-selling activities. This lets each worker play their best possible hand.

External Working Memory

Nobody can automate friendliness or creativity. But consider how automation programs facilitate creative collaboration by automatically booking meetings.

In that way, automation acts as an executive function. The software stays aware of each next step in the customer acquisition funnel. Then, it automatically executes the next task.

This frees up a sales representative's working memory during the day. Working memory is a neurological function. It's what we use to keep track of ongoing processes as we solve problems consecutively. That is, our working memories let us keep one eye on the "big picture." This informs each task we perform as we do it.

Working memory is critical to make well-reasoned choices. But, it's also limited. A person may only have four "memory slots," or four processors to keep track of the order of tasks at once.

Fortunately, we can use automation to outsource these tasks. This frees up our memory slots for social and creative information.

So, automation increases workers' creative problem-solving capacity. And, it saves us time.

What is Salesforce Automation?

Salesforce automation, specifically, saves sales team members' time. It also lets them divert mental resources to creative solutions and social reasoning. This savings combination nets departments a high ROI.

Salesforce automation specifically streamlines tasks that let the CRM software function more efficiently. It hands certain processes on the Salesforce platform over to machines.

Thus, this automation improves the team's productivity. And, it cuts down on new users' onboarding time. Salesforce use gets faster, easier, and more effective.

How Salesforce Automation Software Works

Salesforce Automation software communicates with Salesforce. Then, it follows users' directions to execute Salesforce tasks automatically. Imagine the time savings!

Teams use this automatic execution to streamline almost every Salesforce function.

Imagine how much easier your life is going to be with Salesforce automation!

Automation can make any sales process move faster. Chatbots provide friendly customer service. Automatic predictive lead scoring functions save time wasted weighing priorities.

Which tasks you choose to automate matters. While the best choice often varies from team to team, general trends hold across the board.

Sales Tasks to Automate for Maximum Impact

Sales reps execute hundreds of small tasks to move a client through a sales funnel. It makes more sense to automate some tasks than others.

The best Salesforce automation ideas free up representatives' time. Then, they'll spend that time cultivating strong, personable customer relationships. These relationships are customer acquisition's backbone.

Salesforce trends show us which tasks take up a disproportionate time. And, despite the time they take, you can't simply cut the tasks. So, automation streamlines six core sales processes.

1. Lead Generation

Lead generation tasks are crucial. Yet, the software can automate many of them.

Consider research. Representatives spend time identifying market trends, so they can hone in on new potential customers.

Research and Discovery
Sales AI programs with Salesforce Automation can discover these trends faster by scanning real-time market data in seconds. Then it can show team members exactly how to use it.

Automated research informs representatives about customer habits and cycles. It connects these observations to concrete marketing tactics. It can even highlight upselling opportunities.

Voice search functions also facilitate faster lead generation. Smart voice-search software parses verbal cues. This way, it can bring up relevant information in the course of collaborative conversations.

A sales rep won't need to pause a conversation's flow to look something up. Instead, the software pulls up data that drives lead generation as a whole.

Data Consolidation

Teams can also automate data consolidation. A one-click feature lets users automatically input information into Salesforce. It doesn't matter where the data's from.

It could be a lead a coworker passed over by email. Or, it could be from a shared document. Automatic consolidation lets teams develop comprehensive customer profiles in record time.

2. Prioritization

Sales representatives must choose where to prioritize their time. Which leads will most likely become customers? How much of the day should we spend on each part of the funnel?

Automating prioritization makes answering these questions easier. Salesforce software can instantly weigh thousands of variables. Following the priorities it generates pays off.

Automatic prioritization covers several discrete tasks. This includes:

- Market forecasting
- Predictive analysis
- Pacing customer engagement
- Alerting users to real-time buyer signals

To generate smart priorities, automation software needs data. Fortunately, automation also improves data quality.

3. Data Entry

Data entry can consume most of a sales rep's day. In fact, data entry is the task most responsible for dragging down the time a rep spends selling.

Rather than sell 95% of the time, most teams only spend 33% of their day closing actual sales. Tedious data entry takes up one to two hours every single day.

Some teams outsource data entry to unskilled workers. But Salesforce is a complex program.

It's better to outsource line-by-line tasks to Sales AI. Specifically, one that knows Salesforce inside and out.

Salesforce automation programs enter data correctly with a single click or intuitively. Some entry points don’t even require that minimal effort.

Client Focus

In a sales call, automatic data entry lets the seller focus on the client. Rather than typing in data as they talk, the program enters the data. This frees the seller to build a thoughtful, emotional connection with the client.

Sales AI can direct data where it needs to go regardless of source. It understands key terms and processes. Then, it applies that understanding to what it “reads” in an email and what it “hears” in a recording.

Reduce Human Error

Automatic data entry reduces human error. Studies show that even a single data entry error can render a study’s results inaccurate. It can wrongly turn “noise” into a “signal”—or vice-versa.

Teams need accurate data to make smart choices. Fortunately, automatic data entry reduces the incidence of error.

The highest-risk industries are largely making the switch to automatic data capture.

In the United States, data entry errors in patient records kill almost 1000 patients each day. Yet, hospitals that use automatic data capture to generate health records cut error rates in half.

Hospitals already use data-entry automation. It saves lives. For your team, this automation saves time—and closes deals.

4. Collaboration

Salesforce automation facilitates pipeline management.

To manage a customer acquisition pipeline well, sales and marketing teams must collaborate. Teams might also need to work with the IT department.

Invitations to collaborate can quickly fill users' Salesforce inbox. Fortunately, automation can address this too.

Automation makes collaboration easy. An automated program could:

- Schedule meetings at ideal times (without prompting)
- Generate follow-up emails
- Personalize common messages one team sends to another
- Record critical data and decisions
- Streamline collaborative processes
- Distribute information that keeps teams' goals aligned

Automation doesn't replace collaboration. It makes it easier.

5. Communication

Ideally, a sales rep spends most of his time engaging leads and customers. Automation takes over the tedious parts of communication.

Salesforce automation software generates personalized messages from a customer's data profile. It can also increase engagement with curated content.

It also bears best practices in mind. It knows the right time to send follow-up messages. And, it knows what type of message to deliver each time.

Some automated software tools focus on email. This can be follow-up emails or automatic, tailored email marketing campaigns, or email tracking and analytics.

Email campaigns are effective. But, they only work if leads can read them.

So, it's important that an automated program still generates high-quality emails. Content quality makes sure the message gets past any spam filters.

Part of this is cultivating an opt-in email list. A smart automation program knows where it gets its data from. It will prioritize customers who actively seek out sales communications.

6. Pricing

It takes time to generate smart price quotes—if you're a human. Fortunately, Salesforce automated programs accelerate price quote generation.

Salesforce's data consolidation improves the CPQ process. With Salesforce, your team is less likely to leave money on the table. At the same time, the programs accurately predicts the price a lead will accept.

Salesforce automation further streamlines this process. A sales representative can input the right data and get a reasonable CPQ in a matter of seconds. Pricing automation is a huge factor in Salesforce's high ROI.

How to Automate Salesforce Successfully

You can use software to automate tasks in all six categories. Yet, not all automation strategies are equal.

Approach automation with a plan. As a team leader, you influence the direction automation takes. Your company's goals should drive your propositions.

As you develop an automation plan, be mindful of how the plan underscores these goals. And, make sure your aims are feasible with current technology. To do this, abide by two rules.

Use Data to Set Goals

The first rule is, "use data to set goals." Your company sets the overarching goals. How do the sales department's goals get the company to that space?

Then, work backward. Think critically about the day-to-day tasks your team handles. What's wasting the most time?

Then, consider efficiency. Analyze time-spent data to discern bottlenecks. What prevents maximum Salesforce efficiency?

Then, start working forward. You know the goals. What does your team need to meet those goals?

Then, what should people do to meet those needs? Project a sensible cause-and-effect chain. Then, trace it back until you reach what to do today.

Derive the plan from data. Accurate data builds the best path from where you are to where you want to be.

Collaborate with Developers Effectively

The second rule is, "collaborate with developers." Salesforce automation software is an application. But, you're not an application engineer.

Fortunately, some engineers work at your company. So, your IT department is an incredible asset.

Software engineers can help you cultivate relevant automatic functions. These functions make Salesforce the best possible version of itself for your team.

As you work with them, create materials as you go. Use engineers' insights to develop marketing content.

Ask questions that occur to you. Develop training materials from their answers. This collaborative strategy paves the road to success.

Strategize: Salesforce Automation Best Practices

As you develop a plan, the best mindset is data-driven. It's also collaborative.

The best practices accelerate sales success. Research shows these concrete strategies make Salesforce automation easy. Establish these nine practices to move your team forward.

1. Automate Intentionally

First, automate intentionally. Many tasks can be automated. But, automation takes time to implement—at least at first.

Know your team's priorities. Then, implement Salesforce automation in order. The order prioritizes automation with the highest impact first.

Also, understand your team's process well enough to determine genuine bottlenecks. Is slow communication the barrier? Or has your team de-prioritized collaboration?

It's best to streamline the tasks causing the most problems. It's also wise to make sure the issue is one automation can solve.

2. Define and Test Processes

Automation requires an AI to execute tasks in a precise order. Execution is contingent on triggers. You can set anything from the time of day to email open rates as a trigger.

Creating this chain of events defines automated sales processes. Yet, it's not always clear which process solves the problem best.

So, you'll need to test automation processes to determine the best practice. Create a few variations and compare them.

3. Think Ahead

As you implement automation, stay mindful of how things change. Ask yourself how to automate flexibly. Your strategy should accommodate plausible future scenarios.

These might be scenarios limited to your company. How will this automation plan scale? Can it handle unique our client types?

It's also wise to be ready for large-scale change. How can your process integrate with future technology? This could be Salesforce updates. Or, underlying technology could become obsolete.

After all, third-party cookies and email pixel beacons were once routine. Now, they're unusable. Data-gathering methods changed with the times.

Automation will too. Can your plan handle that?

4. Choose the Right Tools

Choosing the right tools for each job seems elementary. Yet, the practice is fundamental.

When you choose the right automation tool for each task, onboarding goes faster. And, you won't waste time looking for a replacement.

We'll unpack tool choice in more depth later in this guide. At this stage, it's simply wise to be mindful. Checking out G2 is a good start.

After all, Salesforce surpasses other CRM tools. In the same vein, Salesforce automation tools also vary in quality.

5. Be Concise

Concision is good across the board.

Stay concise when you name things. All named elements benefit from concision. This is true of files, functions, and decision paths.

A concise name tells users each node's identity at a glance. This cuts down time spent reading and searching for information on the platform.

Concision streamlines communication.

Likewise, concise processes are (often) better than long ones. A simple cause-and-effect chain moves customers through the funnel faster. The key is to balance simplicity with personalization.

6. Implement Standard Best Practices

The sixth best practice is “implement standards.” Standards outline how team members should use Salesforce. This reduces errors and integrates the program into representatives’ routines.

Standards should not vary from one person to the next. If possible, standardize automated data-capture processes for all teams in an organization.

When a practice is standard, it’s easier to remember. It also improves the team’s cohesion and alignment.

7. Effective Salesforce Automation Training

To implement any program well, you need to train users. What’s the best Salesforce automation training method? This might seem like an open-ended question.

Yet, researchers have studied how humans learn. You can apply vetted methods to train teams to use software to positive effect. And, new methods facilitate virtual learning. These strategies onboard overseas team members effectively.

Feynman Method

Dr. Richard Feynman was a physicist. He made incredible strides in the field of machine learning.

His observations also help humans learn. You can use the Feynman Method to train your team.

Feynman Training

First, describe Salesforce information to your student. Then, ask the student to explain the information back to you. Ask them to use their own words.

Encourage the student to explain in as simple language as possible.

The student will probably get stuck on part of their explanation. At that point, encourage them to identify precisely what they don't understand. The student asks a concrete question to clarify the information.

Then, the student will resume explaining. As a person describes information in simple language, they understand it better.

This process of listening, describing, and asking questions empowers deep learning. It encourages a student to build an accurate mental map of the information.

Honing an accurate mental map makes it easy to reference that information. This makes it easier to use Salesforce after only one training session.

Build-In Routine Training Updates

Training should not be a one-time event. Instead, build training into your department's routine.

Team members should be aware of upcoming training sessions. It helps when you train in regular cycles.

This way, you won't have to scramble to train staff on new Salesforce updates. Instead, you can simply integrate updates into the regular schedule.

When there are no updates, training seminars can focus on specific integrations. Or, they can highlight automation best practices. This further clarifies and reinforces the information.

Virtual Sales Training

Virtual training is an integral part of the process. These video-chat sessions empower remote workers to use Salesforce well.

Virtual training uses similar methods as remote sales coaching. A savvy manager can combine training and coaching in a single call.

Both virtual training and coaching benefit from similar traits. Are you aware of your team's non-verbal cues? Have you tracked team members' progress, and can you help them correct course when they're off-track?

Likewise, concise meetings are better. They're memorable and cost-effective.

Plan out what you need to teach before the session. This keeps you from wasting time on tangents.

8. Balance Sales Rep Workloads

Rapid growth is a great problem to have. But, it can still be a problem.

Fortunately, you can solve it by maintaining balance. As the client list grows, balance the workload evenly among team members.

Integrate this balance into automated processes. For example, use the software's collaborative features to help team members divide up work quickly.

One way to balance workloads is to define each representative's territory. Look at each team member's sales data so far. Then, curate territory borders that utilize each member's strengths.

Territory can be client categories rather than geographic regions.

9. Routine Process Evaluation

Finally, implement routine evaluations. Regularly check the impact of each automated process.

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How is it going? Rate the impact with KPIs that make sense for your company. Examine all relevant metrics.

The impact will probably be positive. Yet, it's worth asking if it could be even better. Can the process be optimized in any way?

Routine evaluations let you account for changing contexts. They also keep you from settling for middling gains.

Without regularly scheduled evaluations, you may only discover a problem after its affected your team. With them, you prevent problems from happening.

Conclusion on Salesforce Automation

Salesforce is the customer relationship management software of choice. However, it is only partially enabling out-of-the-box. The longer your Sales Org goes without customizing and automating how it works with your sales teams, the farther you'll be from scaling up your revenue efforts.

Let your competition spend 1,200 hours per year / per rep on data entry and admin tasks. You're here to give your salespeople an additional 1,000+ hours of selling time every year—without that much effort.

You're only 30 minutes away from modernizing your Sales Org!

SCHEDULE TIME RIGHT NOW before your competitors' do!

Click Here for to Reserve Your 30 Minute Session with Jeff

Jeff Grice

Director of Sales Acceleration