

# 100 Sales Tips for 2017



salesforce

## Blaze your Trail to more sales at Trailhead.

Astro and friends will guide you through everything you need to know about Salesforce. With fun, easy-to-follow trails you'll be up and running in no time.

Find your path forward at [salesforce.com/trailhead](https://salesforce.com/trailhead)



## Introduction

Today's customers are more informed and connected than ever before – and they expect more from businesses. That packs the pressure on you and your sales team to be just as knowledgeable, fast, and intuitive as they are. The top sales teams have adapted to this customer shift; they're swapping product pitches with customized solutions; they're replacing traditional sales success metrics with response rates and satisfaction scores that prioritize customer experience. Now pair this proactive sales approach with cutting-edge technology and watch the market get more competitive– businesses will continue to sell faster, smarter, and offer more personalized service.

We've entered the era of supercharged sales.

But with technology always evolving, we know it's daunting to stay on top of current trends and best practices, while juggling customer expectations. To help your sales teams succeed, we tapped our trusted network of sales experts, including successful business leaders, authors, and our own Salesforce sales reps. We took the very best of their tips and created this e-book.

These experts' insights encompass the entire sales cycle – from meeting with a prospect, to the post-sale relationship, ensuring every customer would give you a referral. So get ready to consume some top tips that will transform the way you sell in 2017.



- 4** Use content and email to sell
- 10** Use events to sell
- 15** Connect with prospects and get meetings – fast
- 20** Think like your customer
- 24** Leverage technology to accelerate sales
- 28** Empower your customer
- 31** Ensure customers are happy after the sale
- 35** Onboarding success
- 38** Drive usage and adoption
- 41** Appease angry customers
- 44** Cross-selling and upselling opportunities
- 47** Cultivate customer loyalty

## CHAPTER 1

# Use content and email to sell

Whether you're using blogs, videos, emails or ebooks, content is king for businesses. It can attract potential buyers, inform prospects, and differentiate your brand, making you stand out among your competitors. At it's best, content does the heavy-lifting for you – it speaks to a prospect's painpoints and gives your company the change to serve up solutions.



## Here's 15 tips to get you started:

#1

Your prospects are hungry for insight that helps them improve their businesses and justify change. That's an opportunity for you to add value. Don't waste it. Don't send whatever's on your desk. Send content proven for the persona, industry, or pain of your prospect. They'll thank you at contract time.

**Peter Mollins**, VP of Marketing, KnowledgeTree

Keep your cold emails laser-focused: Just focus on one benefit or painpoint per sales prospecting email, or you'll dilute your message.

**Heather R Morgan**, CEO, Salesfolk

#2

#3

Before creating new sales assets, take the time to assess the effectiveness of current sales assets.

**Mark B. Levinson**, VP and Group Director, Sales Services, SiriusDecisions

For every "follow-up" sales email that you send, you must provide new and valuable information. Otherwise, your emails will be ignored or marked as spam.

**Heather R Morgan**, CEO, Salesfolk

#4

#7

Turn your videos into apps. It's really easy to add interactive controls to a video. Give customers something to click on; let them jump to a chapter, answer a question, pop up a graphic, branch for a deeper dive and more. Now your video delivers a customer experience that's more like using an app than viewing a sales message.

**Bruce McKenzie**, Principal, 2-Minute Explainers

Position your small business as a thought leader within its industry. Share relevant blog posts, infographics, and case studies with prospective clients or customers. Not only will this content solidify your expertise, but it also establishes trust and knowledge in your brand. For small businesses especially, this is essential.

**Deborah Sweeney**, CEO, MyCorporation.com

#6

#5

Be generous! Share your best ideas. Don't worry about people getting too much for free. You don't need to win everyone. Your ideal client will respond to your generosity. Those that don't are not your type of customer.

**Adrian Davis**, CSP, President and CEO, Whetstone Inc.

#9

Give your customer the tools to make informed decisions by sending them news and thought leadership you've gleaned from your reading, from podcasts you listen to, and events you attend. It also demonstrates your ability to be a trusted advisor.

**Sharon Gillenwater, Founder, Boardroom Insiders**

Tie content marketing to sales. As your sales team works to close deals, encourage collaboration with your marketing team to inject the right marketing campaigns into every email communication through channels like email signature campaigns. Case studies, customer testimonials, or competitive docs can all be used to help a prospect decide to become a customer.

**Dan Hanrahan, Founder & CEO of Sigstr**

#10

#11

Do your homework on the decision-maker and company. If you know the decision-maker's business goals and objectives, you can connect the dots between what they care about (the CIO said she's spending budget on personalization technology) and your solution (which enables personalization), making your pitch relevant and irresistible.

**Sharon Gillenwater, Founder, Boardroom Insiders**

Craft content based on where you are in the sales cycle. Your content should have a clear purpose—inform, convince, or convert.

**Mia Dand, CEO, Lighthouse3.com**

#8

#12

Don't use content to close a deal. Use it to engage a prospect and get them to take the next step in their buying process. Use one piece of content to get them to request another. Initially focus on thought leadership, then transition to what differentiates you, and then to reassuring them you will help them achieve their specific outcomes.

**Adrian Davis**, CSP, President and CEO, Whetstone Inc.

Use artificial intelligence (AI) to look past vanity metrics and identify top-performing content through deeper insights about which pieces attract the highest quality leads, drive larger deals, or accelerate deal velocity. This real-time assessment cuts down on sales cycles and lets you invest energy into the programs that are going to drive the most value to the business.

**Sean Zinsmeister**, Senior Director of Product Marketing, Infer

#13

#14

It can take multiple touch points to close a business-to-business deal, and content can be a great way to stay top of mind and show your interest in earning business. Share content that is relative to your prospect's business or role. If you are dealing with a social media manager, for example, try passing along groundbreaking news in their industry. Do this out of good faith and it will show that you aren't only focused on the sale, but that you genuinely want to help them and build a long lasting relationship.

**Yaniv Masjedi**, CMO, Nextiva

## #15

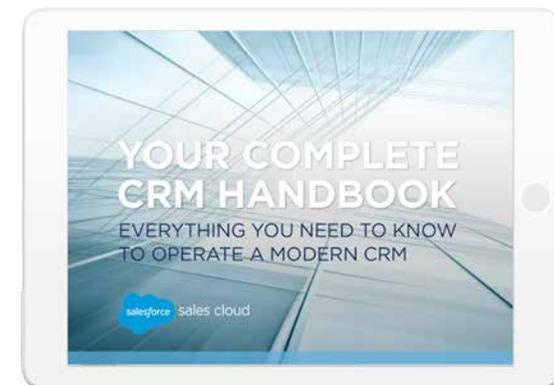
In building content to close a deal, salespeople often miss the mark by thinking the prospect is thinking about the deal as much as we are. In that mistake, we often create content full of assumptions, and then speed through the presentation, with no summary, no recap, no story.

Remember that your prospect is not an expert on the proposal like you are – it's often the first time he/she is seeing it! Keep it simple, provide context and recaps to set the stage, and tell the story of how this proposal came about and why it makes sense for all parties. And make sure your content is aesthetically pleasing as well; those subconscious cues will make it more warmly received.

**Mark Raymo**, Account Executive, Salesforce

Finding, winning, and keeping customers starts with a good Customer Relationship Manager (CRM) application. Find out how CRM helps you manage critical customer information in one place – and gives you a complete view of your business to close more deals and boost sales.

[READ MORE](#)



## CHAPTER 2

# Use events to sell

Events are a handy way for sales reps to accomplish a lot in a short period of time: educate buyers, connect prospects with customers, close deals, and follow-up with customers. Whether the event is a tradeshow, industry event, or hosted by your own company, it's a good practice to define your specific goals and outcomes for each event, then strategize so ensure you accomplish these goals.



## Here's a few ideas to get you started:

#16

Before the event, make a list of your most valuable potential customers. These could include existing customers, execs from other businesses, industry leaders, and influencers who can add value to your brand. Send them personalized (consider handwritten) invitations to the event with a discounted price or customized add-ons to your product.

**Rohan Ayyar**, Digital Marketing Head, E2M

Know your targets and make sure you're available to them. As you attend or exhibit at events, make sure your key targets know about your presence. A great way to do this is by including a clickable, call-to-action banner in your sales team's email signatures, driving your audience to a landing page to schedule a meeting.

**Dan Hanrahan**, Founder & CEO of Sigstr

#17

#18

Have an account-specific strategy, making sure your top accounts are accorded special pre-event outreach and exclusive activities. Employ personalized communications and CXO-to-CXO outreach to make a special effort to get them to attend.

**Sharon Gillenwater**, Founder, Boardroom Insiders

#19

A great way to sell at industry events and conferences is to bring customers to your events. Since your marketing team is investing its time and money to attend events, bringing your customers along for the ride will make your company's presence at the event more impactful.

**Sangram Vajre**, Co-Founder & CMO of Terminus, Founder of #FlipMyFunnel

Hosting events is a great way to gain new customers. If you throw a good party, people like you. Treat your customers well with a nice event and inform them about your products and services all in the same afternoon.

**Deborah Sweeney**, CEO, MyCorporation.com

#20

#21

Ensure your own executive team's participation. Use it as a hook to schedule more customer meetings. Designate them as official "hosts" and build a VIP experience around them, including receptions, meals, invitation-only presentation sessions, meetings in a company hotel suite, VIP booth tours, prioritized seating at keynotes, etc.

**Sharon Gillenwater**, Founder, Boardroom Insiders



In-person remains sales' top communication channel for connecting with customers.

"Second Annual State of Sales," Salesforce Research, November 2016

## #22

Ask your customer or prospect what she would like to get out of events and then tailor future events to this. For instance, many executives want to network with other execs over dinner as it extends their network and allows them conversations they might not have organically. Plus, if you make it a great time, no one can refuse! If your customer or prospect loves to be inspired, bring them to larger marketing-driven events (like a Dreamforce) so they can soak up other ideas and even mirror how Salesforce delights its customers. Plus, events make your customer feel part of your world and high up on your priority list.

**Paula Rainford**, Manager, Sales Reps, Salesforce



#23

Don't assume your event participants know what to highlight about your company's products and services. Have a plan and prepare by training those in attendance. Discuss goals and reassess as needed throughout event with daily updates/briefings.

**Jim Korpolinski**, V.P. of Business Development, Chowly Inc.

Be present. I know that may seem obvious, but one would be amazed how many business people at events seem more interested in speaking with one another versus engaging prospects.

**Jim Korpolinski**, V.P. of Business Development, Chowly Inc.

#24

#25

You don't have to be at every single industry event. If there's one event you're going to do every year, it has to be your user conference. Whether you're a small startup or a large enterprise organization, it's important to host an event, or multiple events throughout the year, which provide an opportunity for your clients to get together. An annual user conference helps with retaining your existing revenue, preventing churn, and increasing customer advocacy.

**Sangram Vajre**, Co-Founder & CMO of Terminus, Founder of #FlipMyFunnel

Salespeople spend 66% of their time on activities other than selling. Read *Secrets of the Most Productive Salespeople* to find out how to take back that wasted time and turn it into selling action that produces results.

[READ MORE](#)



## CHAPTER 3

# Connect with prospects and get meetings—fast

It's every salesperson's dream to open their inbox or CRM and find it stuffed with prospects, already qualified and eager (impatient even!) to sign large deals. Unfortunately, that isn't real life – in reality, sales reps often vie for a prospect's attention, and compete to get on their calendar. Needless to say, it takes more art than science to get a meeting with a prospect.



## Here's a few ideas to get your started:

#26

How well do you know what is on your prospect's mind? Learn what's driving her decisions so you can approach her as a knowledgeable partner who can help solve her problem. Look for a hook to get her attention – something she (or her boss) has said publicly is always best.

**Sharon Gillenwater**, Founder, Boardroom Insiders

Make the meeting itself valuable in the prospects eyes. Rather than trying to get a meeting to sell to them or find out their needs, get a meeting to share valuable information, case studies, benchmarking data - anything they would value.

**Ian Brodie**, Consultant & Author

#27

#28

Always begin by thinking about their most strategic goals. Then look at external trends and internal obstacles that are interfering with those goals. Position your value here and C-level executives will welcome you.

**Adrian Davis**, CSP, President and CEO, Whetstone Inc.

Focus on the opportunity cost of NOT doing the deal for the prospect. How will their business be negatively impacted the longer they wait?

**Matt Heinz**, President, Heinz Marketing

#29

#30

Identify with the person you are connecting with and speak to their priorities, not a specific product. The best way to get on someone's calendar is to align your messaging with what is important to them. To do this, you must first do research and ask really good questions; then ask for the meeting and make sure you offer a specific day and time. Don't make your prospect work!

**Alison Gooch**, Sr. Manager Enterprise Business Reps, Salesforce

My best selling tool is a story about a client that I've been working with and the success that they've had. If a prospective client hears a well-crafted (and true) story of how I've helped someone accelerate their journey from leader to thought leader, they say "I want that, too" and there is no additional selling needed. Selling is really helping someone visualize a future they want and how you can help them achieve it.

**Denise Brosseau**, CEO, Thought Leadership Lab

#31



#32

When trying to get some time on that all-important prospect's calendar, show a little R-E-S-P-E-C-T. I know of a few salespeople who appear in my inbox week after week, month after month – who don't seem to be listening to my silence. If someone truly isn't interested, table the discussion for a later time. And consider that a meeting may be unrealistic for some prospects and buying cycles. Take things slow; you may need to educate first by providing useful industry content before suggesting that initial meeting.

**Heike Young, Content Innovation Lead, Salesforce**

The #1 way to get every meeting with one call is with a referral introduction from someone your prospect knows and trusts. Your sales process shortens because you have immediate credibility. You get inside info on competitors and decision-makers, and your conversion rate soars to more than 50 percent.

**Joanne Black, Founder, No More Cold Calling®**

#33

#34

Check LinkedIn for what people are endorsed for at that company. Find the company profile on LinkedIn, select the # of employees link, and in the 'advanced search' section, type in (one at a time) your company name/competitors of yours/general terms used to describe your offering. This will surface any profiles where the individual has published their endorsements or included these keywords in their profile. Then email them asking to connect since they have expertise in that area!

**Chelsea Felch, Account Executive, Salesforce**

#35

With outbound prospecting, it's critical to focus on the right target accounts as opposed to trying to boil the ocean. Predictive scoring can show you the value of an account (i.e. its anticipated deal size, revenue impact and other metrics) before your team engages, so you'll have confidence you're spending time in the right places.

**Sean Zinsmeister**, Senior Director of Product Marketing, Infer

Lead with an industry question to get the prospect to engage. Prospects are always hesitant to talk, so make it easy for them to share their insight on a current issue their industry is facing. Once they respond, then follow-up by asking how that issue impacts their own situation.

**Mark Hunter**, CSP, "The Sales Hunter," Author

#36



## CHAPTER 4

# Think like your customer

You know that building a rapport with prospects and customers is essential. Customers don't want to feel like they're just another one of your commissions; they're looking to partner with a sales rep who understands them and can help them solve their problems. It takes more than listening to a potential buyer's painpoints. As a sales rep, you need to put yourself in their shoes so you can intimately understand their business needs. Only when this mutual understanding is achieved will the customer begin to trust you.



## Here's a few ideas to get your started:

#37

Start a conversation, not a pitch. Be sensitive to overloading customers with too much information out of the gate. Instead, ask a few questions to get a feel for why they came to you in the first place and what exactly they're looking for.

**Kevin Cundiff, VP of Retail, Fortegra**

Examine how your customer creates value for their strategic customers. Then think about what they may be missing based on emerging trends.

**Adrian Davis, CSP, President and CEO, Whetstone Inc.**

#38

#39

Often, salespeople tend to lead conversations by talking about their product. In order to think like the customer, salespeople need to talk less about products and features, and ask questions instead. By asking intriguing, open-ended questions, customers will become excited and share their passions for their business. When salespeople can uncover what their customers are passionate about, they will also discover what challenges their customer is facing. That's when salespeople can begin solution-selling, not product-selling and bring value to their customers.

**Elizabeth Hicks, Account Executive, Salesforce**

#40

True personalization is under-utilized during the complex sales process. Before reaching out to a prospect, do your homework and find out what they care about and if there's a current problem they're trying to solve. Avoid using a templated approach – err on the side of too much personalization.

**Mindi Rosser, Social Media Business Strategist**

Read what the customer's executive team is saying. Read their latest earnings call transcript. List management's priorities, objectives and challenges, then ask yourself: How does this impact my contact? How can I help him/her? Being able to connect the dots between their business and yours is an essential sales skill.

**Sharon Gillenwater, Founder, Boardroom Insiders**

#41

#42

In order to think like your customer, you must focus on your customer. Your role is to create value for your customer, not just to communicate information about your company or solutions. Before you position your value, a prerequisite is having a deep sense of what your customer values. When you have done your research, you can begin to feel comfortable in your customer's shoes, and begin the walk together toward mutual value.

**Donal Daly, CEO, Altify**



#43

Talk to your customer about the metrics that they are measured on. Set up metrics for your project so that they have a direct impact on your customer's key metrics.

**Adrian Davis**, CSP, President and CEO, Whetstone Inc.

Take the time to map out your customer's processes and identify the inefficiencies. Get agreement on the problem(s) before you begin to propose solutions.

**Adrian Davis**, CSP, President and CEO, Whetstone Inc.

#44

#45

Do not try to think like your customer. Research shows that when business owners or marketers try to be empathetic, their own consumer identities and personal preferences come into play. Therefore, always survey actual customers, use focus groups, and base your decisions on objective data.

**Rohan Ayyar**, Digital Marketing Head, E2M



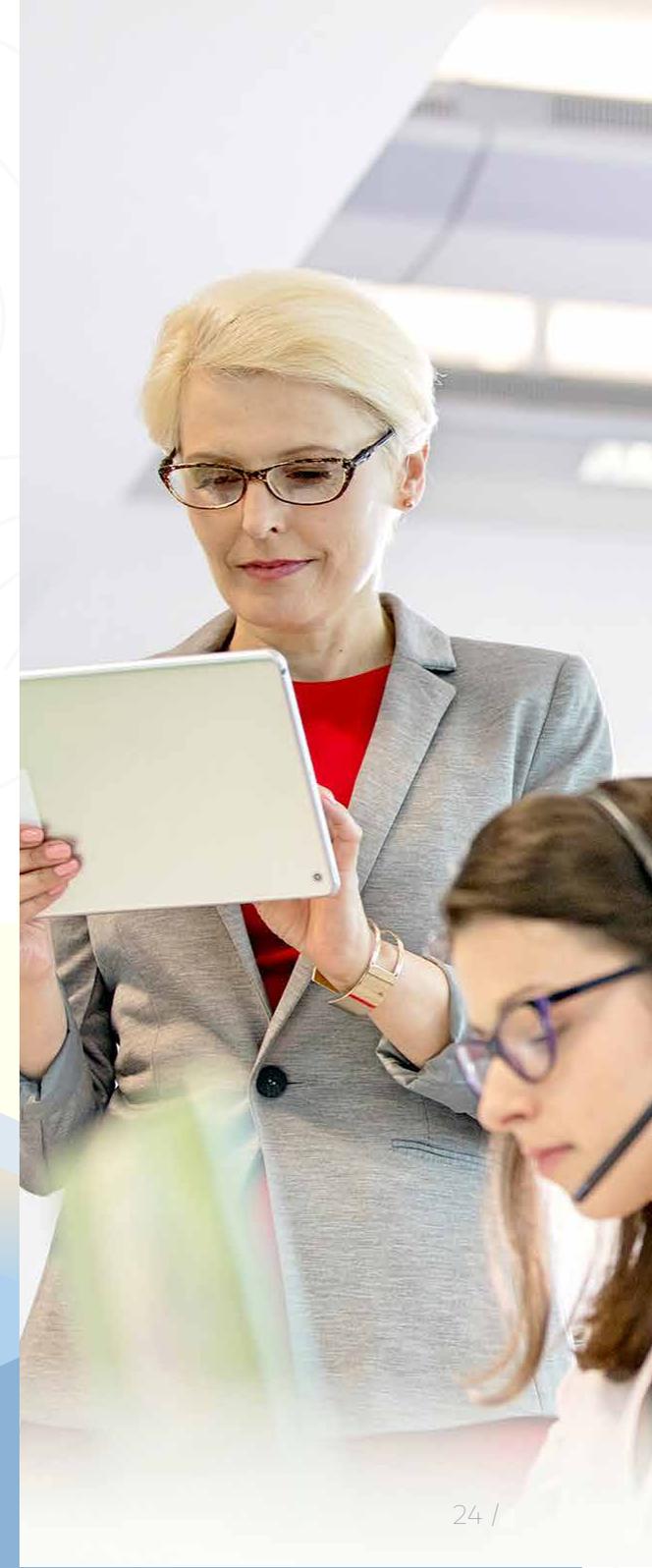
Customer experience is ranked the top KPI type used by sales organizations to measure success.

“Second Annual State of Sales,” Salesforce Research, November 2016

## CHAPTER 5

# Leverage technology to accelerate sales

Today's sales teams have access to all sorts of technology that makes it possible to close deals fast. There's CRM, smartphones, and predictive analytics, all designed to help sales reps close deals smarter, faster, and from any anywhere on the globe. But as technology is constantly changing and advancing, it can be tough to keep up with the latest tools and techniques top teams are using. Here's how our network is using technology to their advantage.



#46

Use the tools (such as a tablet or laptop) that work for you, NOT your co-worker, but you! Also, remember that sometimes technology can be a distraction to the sale. Know what to use, how to use it, and when NOT to use it.

**Jim Korpolinski, V.P. of Business Development, Chowly Inc.**

Use video as often as possible. If I'm on the phone with you and you are a prospect, after our call I will make a short video specifically for you thanking you for your time and saying that I look forward to connecting again. I will then send that video to the customer and, undoubtedly, it will help accelerate the sale. Make these videos personalized and not overly produced – it will be far more authentic and have a bigger impact.

**Yaniv Masjedi, CMO, Nextiva**

#47

#48

If you're not using social selling strategies you're falling behind! LinkedIn and Twitter are great tools to better understand your prospect and buying team, provide meaningful insight and content, and build your credibility as a trusted advisor. Prospect contacts in your CRM should also be social media connections.

**Jeremy Wiggett, Director, Sales Development, Salesforce**

Make sure that your site is mobile-friendly. More people are using their phones to shop now than ever before. If your company isn't mobile-friendly you could very well lose a sale to a competitor who has a fast and easy mobile site.

**Deborah Sweeney, CEO, MyCorporation.com**

#49

#50

End ineffective sales calls. Mobile call-planning platforms can help guide sellers to plan as a team, define objectives and collaborate on the result. Team members can annotate the call plan with their impression of how the call went, any new contact information and follow-up actions. Collaboratively review outcomes to identify the best possible path forward to progress the opportunity.

**Donal Daly, CEO, Altify**

An AI platform for sales gives sellers deep muscle memory from a million sales engagements, knowledge of the world's best sales methodologies, and the insights from their own business. It all comes together to guide what to do next to progress a sale, to trigger the next action, to increase the seller's knowledge and achieve increased sales results, every day.

**Donal Daly, CEO, Altify**

#51

#52

Evaluate your sales applications for both the business value (does it meet the organization's needs and priorities?) and end user value (are users truly engaged with your entire sales tech stack?).

**Mark B. Levinson, VP and Group Director, Sales Services, SiriusDecisions**



High-performing teams are **3.4x more likely** than underperforming teams to use artificial intelligence (AI) currently.

“Second Annual State of Sales,” Salesforce Research, November 2016

#53

When your business relies on outbound prospecting to named accounts, it's crucial to prioritize outreach to the best accounts first. Use predictive analytics to make – and equally distribute – data-driven territory assignment decisions based on where the top accounts are concentrated, and to give each rep an equal shot at closing new business.

**Sean Zinsmeister, Senior Director of Product Marketing, Infer**

Eliminate time spent researching leads by using predictive scoring and profiling technologies to gather detailed information about each prospect, like whether they're a fit for your product, or their likelihood to make a purchase soon. Use this information to create highly segmented lists based on specific attributes and data signals, and to personalize outreach for better engagement.

**Sean Zinsmeister, Senior Director of Product Marketing, Infer**

#54

Learn how to get more out of the world's #1 CRM. Get More Value From Sales Cloud shows you how to customize, automate, and connect to achieve 45% increase in pipeline.

[DOWNLOAD E-BOOK](#)

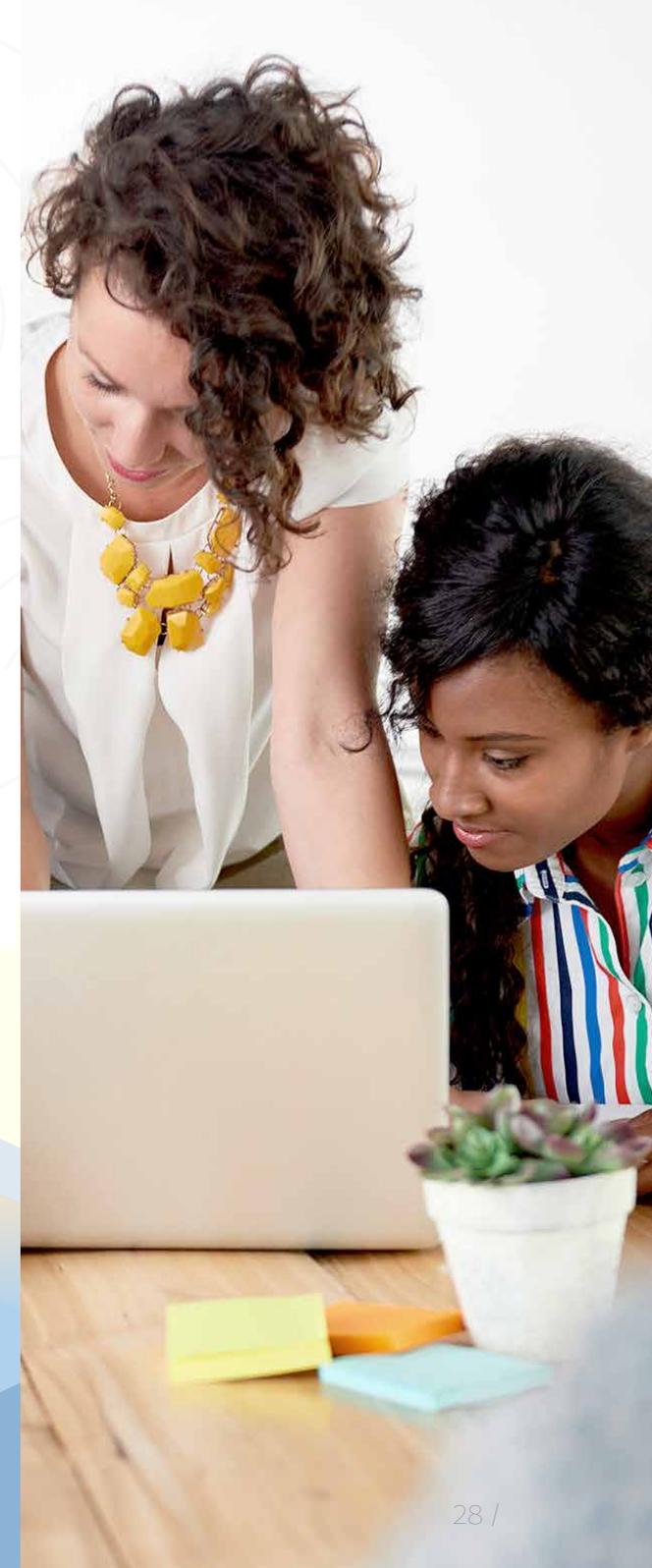


## CHAPTER 6

# Empower your customer

Since today's customers are more connected they're also more informed about products and service long before they decide to buy them. What they're looking for now is a personalized customer experience. So instead of just pitching products and closing deals, sales teams need to become trusted partners, working closely with customers to engage them at every point in the buying journey.

You can build these kinds of relationships by empowering your prospects and customers – give them access to tools and information, implement their feedback on your services, and make them part of your network.





#55

Invite your customer to attend prestigious or business critical events and make introductions to colleagues or other people they should know to help their networking and enhance their industry knowledge.

**Sharon Gillenwater, Founder, Boardroom Insiders**

Encourage prospects to explore reviews. Generating reviews and testimonials is a great way to give your prospects a place to go for current customer feedback. As you gather these reviews, be sure they're in an accessible place for you prospects, such as on the website or subtle call-to-action banner in your email signature.

**Dan Hanrahan, Founder & CEO of Sigstr**

#56

#57

Keep bettering your product, continually. Keep improving your customer service, ceaselessly. Promote your customers' success stories, copiously. Don't just ask for their feedback – act on it!

**Rohan Ayyar, Digital Marketing Head, E2M**

#58

Find the customers that are happiest with your service. Connect with them shortly after they sign up and ask them if they'd be willing to connect with potential customers later on. We do this and find that people are more than happy to help. We actually have one person who manages these relationships; the sales people go to her for everything. I recommend others do the same. Assigning a dedicated person in your company to communicate with happy customers and link them to prospects is one of the best things you can do.

**Yaniv Masjedi**, CMO, Nextiva

Training your customer is one of the best ways to empower your customer. The more comfortable a customer is with best practice strategies and tactics, and the more comfortable they get with your product or service, the more confident and independent they will become.

**Dave Duke**, VP of Customer Success of Sigstr

#59

## CHAPTER 7

# Ensure customers are happy after the sale

Signing the contract is only the beginning of the relationship with your customers. You've worked hard to win their business, and now you must work harder to keep it. Passing them off to a customer service rep and calling it a day isn't an option. Sales reps who continually nurture and build stronger relationships with customers will likely experience more opportunities via referrals.



#60

To drive strong customer satisfaction, implement a customer success role that can focus on retention, upselling/cross-selling and/or customer engagement.

**Mark B. Levinson**, VP and Group Director, Sales Services, SiriusDecisions

As a sales guy, I almost always notice a support ticket from a newly minted customer, usually within 24 hours of the sale. Responding VERY quickly to this support ticket, regardless of the answer or sentiment of news you can give them, is what matters most. They will perceive this as good service (or bad, if you don't answer soon) for the rest of the relationship. Make the first support ticket get answered lightning fast, and it will pay dividends, literally.

**Dmitry Dragilev**, Founder, JustReachOut.io

#61

#62

Turning your customers into raving fans is a process, and one which should be taken seriously at all levels of your company. Jay Baer says one of the biggest things to do is have a timeline for customer onboarding. What are you supplying your customers at Week 1, Week 2, 30 Days, 60 Days, 90 Days, etc.? Marketing should work with client services/customer success to align activities and content with this timeline to continue nurturing your accounts.

**Sangram Vajre**, Co-Founder & CMO of Terminus, Founder of #FlipMyFunnel

#63

As your business grows, don't lose sight of your customers and what you can do to fulfill their needs. Welcome any and all feedback as it helps to improve your own customer service initiatives and make their experience much more personalized.

**Deborah Sweeney**, CEO, MyCorporation.com

It's amazing how many salespeople fear asking these two questions after a sale is made: "What were the deciding factors that made us your vendor of choice?" and "What can we do to ensure we exceed your expectations on service and performance?" Many salespeople assume that by asking these questions, it makes their customer second guess their decision. Conversely, it further solidifies their decision, as they're reinforcing in their minds why they chose you and how to best serve them. In addition, you know what best practices to reinforce when interacting with every potential customer.

**Keith Rosen**, Founder and Author, Coachquest

#64

#65

In order to ensure customer happiness after a sale, it is important to act ethically. No amount of hypothetical ROI is more important than your professional integrity or the reputation of your company. Positive or negative, the tone set in the sales process will inform customers' expectations for the rest of their experience.

**Nick Hedges**, President and CEO, Velocify

#66

Tie payments to the completion of your customers' goals and personalize delivery of your product or service accordingly. For example, an airline could accept 20% of the fare after the flight has landed on time and passengers have collected all their bags. This is the best way to eliminate buyer's remorse.

**Rohan Ayyar**, Digital Marketing Head, E2M

Just because a new customer does not call to say otherwise, does NOT imply nor acknowledge they are "happy." Know they are happy by having a planned follow-up call set in your calendar approximately 2 weeks out.

**Jim Korpolinski**, V.P. of Business Development, Chowly Inc.

#67

#68

Your greatest sales force is actually your customers advocating on your behalf. But if sales can't help onboard a customer and ensure they are happy and successful, they will not carry a brand's message forward. It is the organic social and peer-to-peer conversations which we (sales and marketing) can't control. However as the age of the customer comes to life, this statement will become even more true.

**Tiffani Bova**, Global, Customer Growth, and Innovation Evangelist, Salesforce

## CHAPTER 8

# Onboarding success

Congrats, you've landed another deal! Now it's time to get your new customers integrated into your operations and up to speed on your product or service—fast. Customer onboarding can be a stressful time for your customers, so it's your job to help the transition go as smoothly as possible. Whether they sell office supplies or software, top sales people invest time in establishing expectations and ensuring new customers are completely satisfied with their decision to partner with a company.



#69

The goal is for your customer to see value as quickly as possible to prevent implementation fatigue. Every business is different, but leveraging a simple and easy-to-understand onboarding methodology can go a long way in creating a successful onboarding experience.

**Dave Duke, VP of Customer Success of Sigstr**

Effective customer onboarding is all about setting the right expectations upfront. Once you have those, it is about about executing and delivering. Make things as simple as possible. Understand your customer's pain and the fact that they often don't have a lot of time. Make things easy, make sure they are happy and then ask for a referral. If things go well, you may get many more customers, thanks to one positive onboarding experience.

**Yaniv Masjedi, CMO, Nextiva**

#70

#71

Educate your customers on how to get the most from the start. Once a deal closes and your implementation team or client success team starts interacting with your new customer, take advantage of these everyday email interactions. Use these touch points as an opportunity to educate your new customer on features, additional services or upcoming releases.

**Dan Hanrahan, Founder & CEO of Sigstr**

#72

Onboarding can be a challenge based upon many factors centered upon your particular product/service. Take into account the best time of day to implement based upon your client's work demands. It's much easier to receive cooperation if everything does not go as planned when your client has time to manage the situation as well.

**Jim Korpolinski, V.P. of Business Development, Chowly Inc.**

If you think your customers are always reading your contract that finalizes the sale, deliverables and terms of the agreement, think again. Countless hours are spent post-sale, putting out fires that result from misunderstandings around what was expected, resulting in disappointed and unhappy customers. Here are two techniques to avoid failed expectations and the collateral damage that result from poor, assumptive communication.

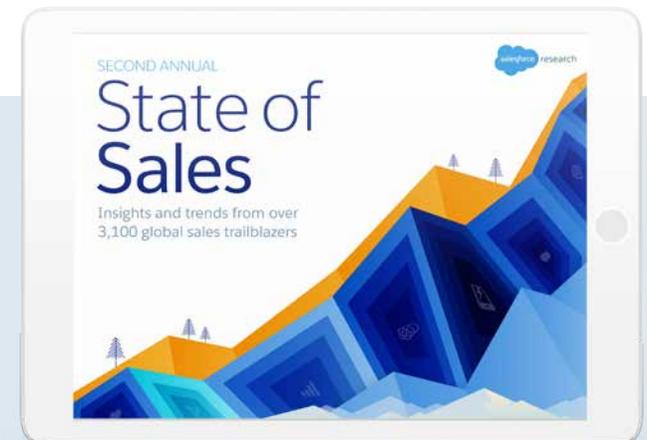
First, schedule a time to review the agreement, whether on the phone or face-to-face. During this conversation, focus not only on the deliverables and value, but on the potential problems that could surface. Realists mitigate unwanted surprises. So, take the time to agree upon a strategy to address any challenges, should they arise. After the meeting, send a recap of the conversation, detailing what was discussed and agreed upon and make sure the customer responds to your email. This acts as another confirmation of alignment and understanding to create the ideal customer experience.

**Keith Rosen, Founder and Author, Coachquest**

#73

How is sales pivoting to be smarter, faster, and more customer-centric? What are the overall trends changing the role of sales right now? The answer to these questions can be found in Salesforce Research's latest State of Sales report.

[DOWNLOAD REPORT](#)



## CHAPTER 9

# Drive usage and adoption

A critical step in customer success is helping new customers drive product or service adoption within their own companies. It won't matter if you sell the most amazing, helpful product if no one knows how to fully use it. Helping your customers succeed pays you back in dividends, which is why you should focus on setting success goals and offering training sessions after the sale.



#74

Ensure your most challenging and skeptical users are part of the pilot. Build out your technology with these users to address real process efficiencies. Focus the training on how users can do their work more efficiently, not on the functionality of the software.

**Adrian Davis**, CSP, President and CEO, Whetstone Inc.

#75

To establish real and lasting adoption in an organization, change efforts must be led from within the enterprise to determine goals and metrics, establish clear and shared understanding of goals and success criteria, as well as the plan for how it will be achieved. Success will rely heavily on on-going coaching and an established cadence by front line managers.

**Donal Daly, CEO, Altify**

We have a Learning Center on our website. In this area on our website customers can not only learn about how to be a better entrepreneur with our general tips, but they can also learn about how to take the best advantage of our products and services. It's not always obvious to walk your customers through how to get the best value out of your products right on your website.

**Deborah Sweeney, CEO, MyCorporation.com**

#76

#77

Have a tool to track your customer usage and tie that usage to the benefits your product gives. For example, if you sell a tool that makes hiring easier, have your system do the math on how much time savings were gleaned based on usage, and then notify the user of how much time was saved based on their usage of the tool or candidates hired.

**Dmitry Dragilev, Founder, JustReachOut.io**

Remember that your customer has internal "customers" they need to convince. Give them all the content they need to help them build credibility and support for your product/service internally.

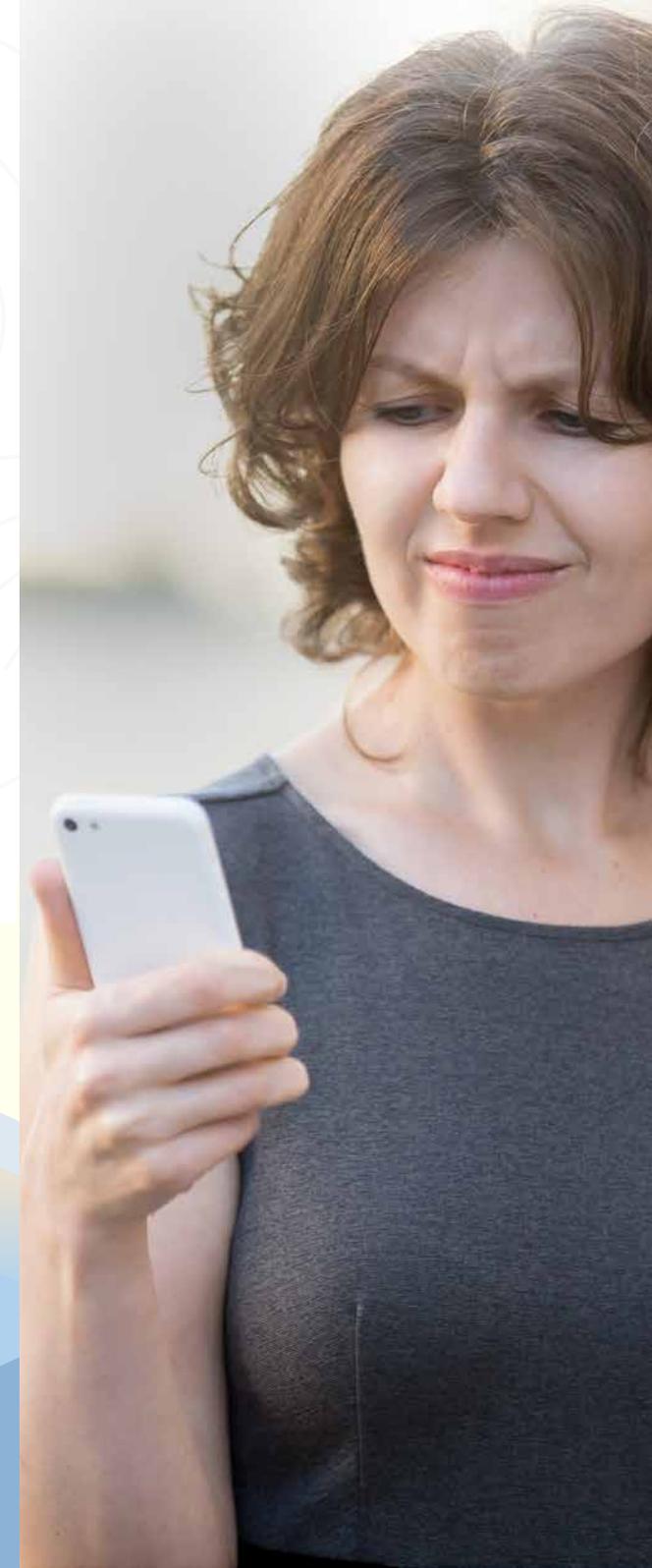
**Mia Dand, CEO, Lighthouse3.com**

#78

## CHAPTER 10

# Appease angry customers

It happens to the best of sales reps: something goes wrong, the customer feels misled, and before you know it, an angry customer is sending you unpleasant emails. While it seems unfair to sometimes receive the brunt of a customer's ire, it's understandable – you've been the customer's main point of contact at your company, and you sold them on the good things about your product or service, not on the things that could go wrong. Now is the time to really listen and find the right solutions to the problem so that your angry customer doesn't become a former customer.



#79

Like any individual who is angry in your personal life, the best way to address it is to listen. Try and understand the root cause of the frustration because usually the frontal attack is a byproduct of something more substantive. Once the person appears to be done with the rant, don't always be too quick to appease. Sometimes, they just want to be "heard" and your knee jerk reaction solution may only add fuel to the fire. Rather, collect all of the issues, and respond later with a substantive solution that address the real cause.

**Jeff Winsper, President, Black Ink**

#80

An angry customer is not upset at you. There is no reason to let yourself respond in anger at any point during an exchange, even if the customer is shouting. The customer has a complaint or issue which prompted them to become angry, and while they're expressing it in an inappropriate way, you have an obligation to act on the customer's behalf as a representative of your company.

**Debra Carpenter, Marketing Director, Conversational Receptionists**

#81

Know that not everyone is going to be satisfied no matter what you do. Know that everyone has a bad day, including me and you. Know that it's okay to offer another time or date to meet. Recognizing someone is having a bad day and not pressing a sale can help secure a future sale versus losing a sale. Listen, learn, acknowledge, and set realistic expectations going forward for solutions and timetable, if appropriate.

**Jim Korpolinski**, V.P. of Business Development, Chowly Inc.

Apart from dealing with the customer's anger, figure out what they really want. Focus on the outcome. Since they're still talking to you and expect a good result, you have the power to solve their problem.

**Rohan Ayyar**, Digital Marketing Head, E2M

#82

Are you making any of these 11 sales mistakes?  
Explore the interactive to find out what NOT to do.

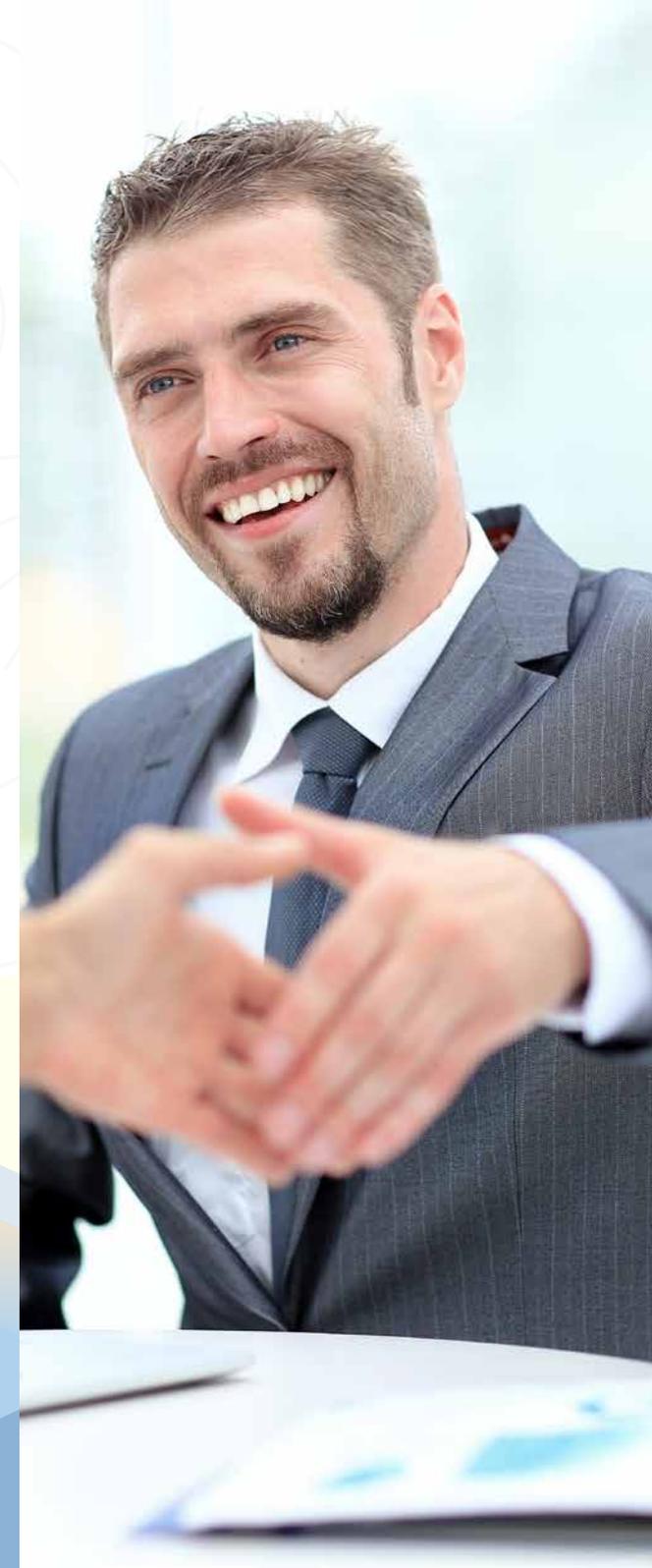
[LEARN MORE](#)



## CHAPTER 11

# Cross-selling and upselling opportunities

Things are going well. Your customers are happy and loving your product or service. Now's the time to strike: Look for opportunities to sell additional or new products to complement your customers' existing purchase, or see if there are other departments that could benefit similarly. But just like when you closed the deal the first time, carefully consider what's best for your customers rather than trying to sell them blindly just because you're already "in". By making thoughtful and valuable recommendations, you reveal yourself more as partner than a sales person just trying to get a new commission.



#83

Always remember the mantra that 80% of your revenue will come from 20% of your customers. Account-based marketing is built on relationships with your high-value customers. When your sales teams know the needs of their accounts, marketing can be actively targeting those clients with relevant upsells and cross-sells to solve new problems and continue to satisfy the customer's needs and painpoints.

**Sangram Vajre**, Co-Founder & CMO of Terminus, Founder of #FlipMyFunnel

Research. Research. Research. To maximize revenue from existing accounts, it really is all about the research. You need to slow down your natural inclination to focus solely on pursuing deals now. If you do your homework and apply the experience you have gained from other customers, you should be able to bring insight to your customer. If you don't do the research, you won't have the knowledge. Which means you can't bring insight – and that is a missed opportunity.

**Donal Daly**, CEO, Altify

#84

#85

Identify the white space. Your objective is to maximize your penetration in the account in a way that maximizes mutual value. Once you understand the people and the problems and have developed a trusted relationship with your customer, you can identify areas of opportunity—the white space in the account—where your solutions can add value to the customer. This is a key way to develop new opportunities.

**Donal Daly**, CEO, Altify

#86

Ask follow-up questions regarding the outcome of the customer's desires so they will focus on the significance of their challenge and the necessity of the desired outcome. Your objective is to get the customer to recognize why they need the additional item/service you're recommending.

**Mark Hunter, CSP, "The Sales Hunter," Author**

A single account is a subset of your overall market, and a composite representation of the individual real and potential prospective opportunities within that account. You must recognize it as an integrated component of the market ecosystem. You also need to integrate data, knowledge and information to achieve velocity.

**Donal Daly, CEO, Altify**

#87

#88

Don't trick anybody. Be upfront about the cost of your products, but tell your customers the real benefits to tacking on extra products. Have concrete evidence concerning how this will benefit them. And if they say no, don't follow up with more than a single phone call and email. Don't be pushy.

**Deborah Sweeney, CEO, MyCorporation.com**

Sell to the C-suite. As technology has become more integral to the overall business, you want to aim for the top decision-makers who set strategy and control more of the budget. Doing this requires training and incentivizing sales teams, establishing infrastructure, and engaging your own C-suite as ambassadors.

**Sharon Gillenwater, Founder, Boardroom Insiders**

#89

## CHAPTER 12

# Cultivate customer loyalty

In today's business landscape, with all the abundant choices available to customers, loyalty is hard won. But when you've captured it, the benefits are clear: customers become brand ambassadors and advocates; they'll refer you to their network, and they'll likely continue spending money with you. Competitors are always just a click away, so it's worth building a loyal troop of happy customers.



#90

Play fair. Life isn't fair—do your best to change that. Many consumers have become accustomed to dealing with companies that don't put the customer's needs first. Make it a goal to change their experience through practices that not only include consistent treatment, but also consistent pricing and an adherence to fair trade regulations.

**Scott McLaren**, CMO, Fortegrat

Make yourself accessible! Inform your clients the best way to get a hold of you. Let your clients know who is best to reach for possible concerns. Provide a simple, one-page listing of relevant department headings, names, and direct extensions.

**Jim Korpolinski**, V.P. of Business Development, Chowly Inc.

#91

#92

Focus on the long game for strategic customers. Be thoughtful and add value – whether it's by pointing them to relevant thought leadership or introducing them to an industry peer. Build relationships that show you are truly committed to their success – and not just your next deal.

**Sharon Gillenwater**, Founder, Boardroom Insiders

#93

Consistency, relevance, and personalization in communicating with customers is something that brands are not very good at. Automated 'Happy Birthday' emails are not the be-all and end-all of a brand-customer relationship. Have your customer representatives take personal interest in the success as well as life events of customers. I'd also recommend going a step further and using predictive analytics to proactively anticipate their future needs.

**Rohan Ayyar**, Digital Marketing Head, E2M

Make it worth their time with discounts, personalized service and answering the phone on the first or second ring. Offer referral bonuses. Make them feel special at every turn and you will have a customer for life.

**Yaniv Masjedi**, CMO, Nextiva

#94

#95

Make customers the heroes of your brand's story by giving them a starring role. This will make them more inclined to be advocates for your product or service.

**Mia Dand**, CEO, Lighthouse3.com

Never launch a product without loyalty rewards or gamification of the customer experience. Proactively map out the customer journey, and make sure the final destination always appears within reach.

**Rohan Ayyar**, Digital Marketing Head, E2M

#96

#97

Interview your customers to find out about the economic impact your intervention has had on them. Then explore ways you can help them in the future.

**Adrian Davis, CSP, President and CEO, Whetstone Inc.**

While becoming more strategic is essential, true champions transform into strategic communicators or risk creating resistance to their ideas. Whether you're dealing with peers, direct reports or customers, this communication strategy creates alignment, sets expectations and clarifies your intentions so people see how they benefit. "Here's what we're doing. Here's why we are doing it. Here's what's in it for you." When people understand your intentions and what's in it for them, they're open to discussion, instead of defaulting to uncertainty, fear and consequently, push back on your ideas.

**Keith Rosen, Founder and Author, Coachquest**

#98

#99

Encourage customers to share reviews with you. Ask them to detail what their experience was like, if they would do business with you again (why or why not), and if they would recommend your business. Listen and accept their suggestions.

**Deborah Sweeney, CEO, MyCorporation.com**

Emotions are tied to goals. Help your customers achieve their most important goals and they will always make time for you.

**Adrian Davis, CSP, President and CEO, Whetstone Inc.**

#100



## Grow your accounts, find new customers, and close deals faster – from anywhere

The best customer experiences start with the best sales experiences. That's why the world's #1 CRM lets you focus on what's most important: your customer. Powered by cutting-edge AI technology to serve customers better, Salesforce's leading cloud-based solution is designed with top sales performance in mind. Get more leads, accelerate productivity, make insightful decisions, and close more deals with Sales Cloud.

**+43%**

lead conversion

**+44%**

lead conversion

**+37%**

revenue

Discover how easy it is to empower your sales teams to sell faster, smarter, and the way they want with Salesforce.

[LEARN MORE](#)





CONNECT TO YOUR CUSTOMERS  
IN A WHOLE NEW WAY



The information provided in this e-book is strictly for the convenience of our customers and is for general informational purposes only. Publication by salesforce.com does not constitute an endorsement. Salesforce.com does not warrant the accuracy or completeness of any information, text, graphics, links, or other items contained within this e-book. Salesforce.com does not guarantee you will achieve any specific results if you follow any advice in the e-book. It may be advisable for you to consult with a professional such as a lawyer, accountant, architect, business advisor, or professional engineer to get specific advice that applies to your specific situation.

© 2017 salesforce.com, inc. All rights reserved.