How to Close More Deals, Starting Today

salesforce sales cloud

Introduction

The headlining trends of cloud, social, mobile, data science, and the Internet of Things (IoT) continue to transform the way we sell. And thanks to the rise of the hyperconnected and multi-device consumer, salespeople increasingly have new ways to reach leads and prospects wherever they are, in real time.

These trends usher in a whole new selling landscape for sales managers and reps. How can salespeople close deals smarter and more efficiently this year and beyond?

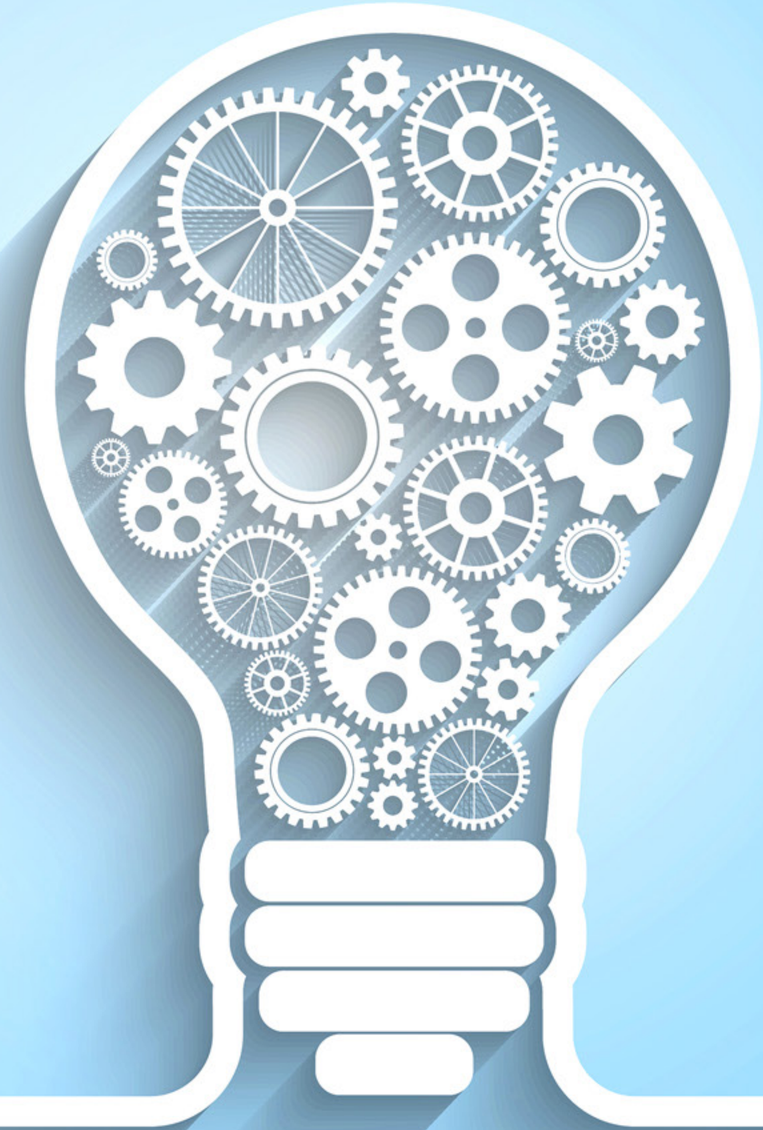
In this e-book, learn how to use new sales tools to improve your selling strategy, starting today. Because customers think and buy differently, salespeople need different tactics to reach them and sell successfully. The sooner you get started with these strategies, the better the rest of your quarter and year will be.

1 Make the Perfect Plan

Every day is the perfect chance to give your sales strategy a fresh start. You make your to-do list, you start sending emails and making calls, but are you fully prepped for selling success? The right plan can help with that.

A better sales plan can mean new prospects, new opportunities, and new ways to grow. If you're not closing as many deals as you want to – or think you could – then a new plan is in order.

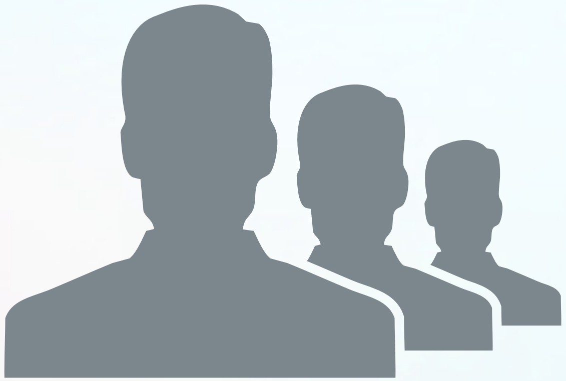
You can execute and pivot on this plan throughout the year, but it'll be the foundation for your selling success. Here are a few things to keep in mind as you build your ideal sales plan.



For Sales Leaders

Now's your opportunity to model your sales territories into a logical and flexible structure.

Territory planning, done correctly, can help you align your sales team to the most appropriate region or group of customers – increasing overall revenue by ensuring you are touching all segments of the market.



Here are five things to keep in mind as you plan to close more deals:

- **Analyze.** Who are you targeting? How big is each territory? What's the skillset of your current sales team, and how can those skills match your potential customer base? Answering these questions will help you align resources with specific market objectives.
- **Balance.** Once you've analyzed your customer base and resources, create targets that set your sales team up for success. Everyone should have an equal opportunity to maximize their compensation plans. That will motivate everyone to achieve and maximize their sales goals.
- **Empower.** As a manager, you don't want to make decisions for your team – you want everyone to be part of the decision-making process. Define objectives together, collaborate, and be transparent about why you're making those specific choices.
- **Assign.** It's time to assign resources to define territories and map the right sales reps to the right customers. You don't want poorly planned assignment workflows to ruin all of your hard work so far. Make sure your assignment engine has the right rules, from roles to effective dates.
- **Refine.** This might be the most important part of your new year plan. Territories and customer needs are always evolving, so your plan must be consistently reviewed and refined. Set reminders monthly or quarterly to ensure the best possible outcomes at the lowest selling costs.

You don't have to be a large company to build a smart sales plan according to these guidelines. Salesforce can help you make the most out of your sales team and selling plan. You can adjust your resources within a CRM to save time, and rest assured that you're always making decisions based on the most up-to-date information in your CRM.

For Sales Reps

Before you pick up the phone, send your first email, or walk into the office tomorrow, take a step back. Look at the territory, customer base, and sales resources you have. How much do you want to sell this year, and how will you get there? Keep these sales planning tips in mind:

- **Set your goals.** It's impossible to meet goals if you don't know exactly what they are. Write down what you want to achieve and commit to it. Visibility drives accountability, so share that with your manager, as well.
- **Analyze** your customer base. Knowledge is power, and knowing your customer is one of the most powerful ways to sell more. What do you know about the people to whom you're trying to sell? Make a list (personas can help), and develop a deep and nuanced view of your customers' needs.
- **Decide** how you'll spend your time to maximize compensation. Improve your own productivity by blocking off time for important tasks like email follow-ups and face-to-face meetings. Also consider creating a "don't do" list to remove the less-productive fluff from your schedule so you can focus on selling.
- **Reassess and refine your sales plan.** Throughout the quarter and year, continue meeting with your manager and team to see how your plan is working and how you need to adapt.

No matter your sales goals, you probably have one thing at the top of your list: Spend more time closing. With Salesforce, it's easy to keep track of assignments and accounts, so you can sell from anywhere and seize every opportunity.

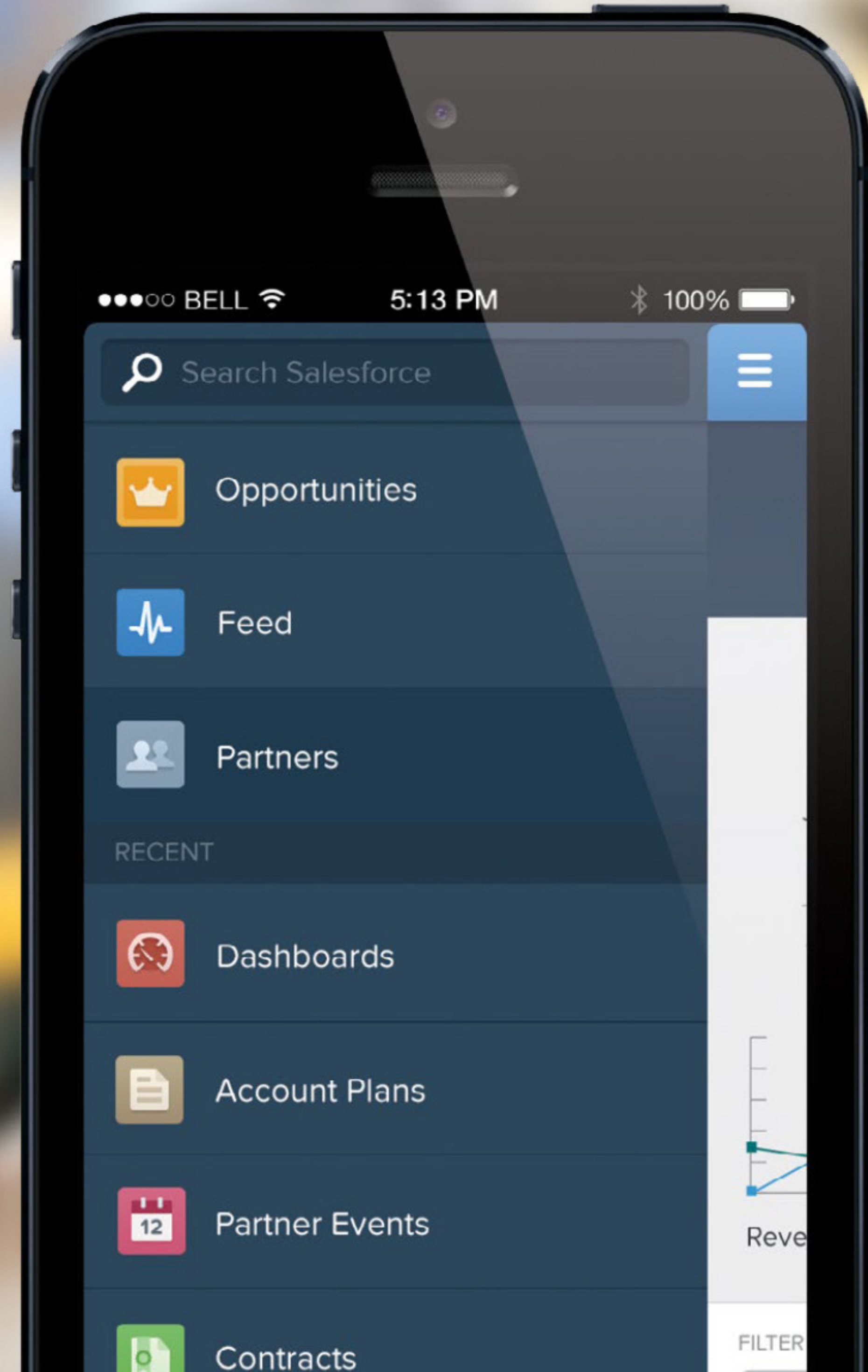
Planning Checklist

- ☐ Set goals
- ☐ Know your customer
- ☐ Know your resources
- ☐ Collect and analyze data
- ☐ Block out important tasks
- ☐ Create a don't-do list
- ☐ Communicate plan with managers and team
- ☐ Reassess and refine

Take an interactive guided tour.

Learn how a sales manager and sales rep use Salesforce to manage their day. This interactive tour guides you through the different capabilities of Salesforce. Experience the world's #1 CRM app today.

LEARN MORE



2 Lean on Data to Sell More

We're living in the quantified era. Terms like "big data" and "analytics" are used in every industry and and job function. All this data holds a lot of promise for sales professionals. Think about it: When salespeople can track every touchpoint and interaction in customer relationship management tools like Salesforce, the promise of increased sales efficiency and customer knowledge suddenly becomes real.

Unfortunately, many companies don't know how to start incorporating data into their sales operations. And bad data is a widespread problem, with 86% of companies admitting that their data is inaccurate in some way.

No sales team can operate at peak efficiency with incomplete and inaccurate records. Fix your data problems and you're well on your way to making more sales. Here's how sales managers and AEs can get started.

For Sales Leaders

Data is the fuel for your team's CRM engine. To close more deals, strive to make every decision more data-driven. With better data, you can manage your pipeline better, uncover opportunities faster, and make smarter decisions about how your team spends its time.

Data's real ability to affect sales comes from monitoring progress, not just results. As a manager, you should be able to understand at a glance, at any point in the sales cycle, how your teams are progressing toward their goals. A CRM solution like Salesforce gives teams the ability to create dashboards that provide immediate insights into how many deals are in the pipeline, where prospects are in the sales cycle, and how long they've been there. These kinds of insights allow you to identify problems before they arise and help your team ultimately sell more.

Your CRM solution generates a tremendous amount of data every day, with thousands upon thousands of rows of data – no sales leader can review all of it! Fortunately, Salesforce reports allow you to sort this data quickly and easily to find the information you care about most. When working with vast data, it's all about working smarter, not harder. If you're looking for a report of last month's activities, you can filter by time, and exclude all activities but your own – and instantly, all the information you need is at your fingertips. You can save this as a report and access it whenever you want. Your reports will automatically sync and update with the new data you generate every day.

Beyond dashboards and reports, consider your whitespace. Look at the numbers to see which accounts or prospects in your team's territories may be close to making a decision – and get those contracts ready to sign. Leaning on data, not just instinct, will be the key to sales success for every team.

For Sales Reps

Prospects are now engaging in more places and ways; they expect to have their sales experience tailored to them at every stage and on any channel. This means modern sales reps need to not only understand where their prospects are in the sales process, but also how to tailor their approach to each stage. It sounds complex – but data makes it simple, and even better, totally doable. The more you rely on data throughout the selling process this year, the more you'll sell.

But what type of data do you need? Before you start selling, update all lead and prospect data. Clean data is tantamount to everything you do in your CRM. As you find and add new contacts and accounts, use a tool like Data.com to help you understand a prospect's title, while also gathering relevant information about the company they work at – including ideas about how the company is organized. Even a little information about your prospect can help you learn more and develop a vision for how you can help them. Research their company's current marketing campaigns. Dig into business news articles that might mention them.

A CRM solution like Salesforce can help you stay on top of just about everything on your growing to-do list. With a CRM solution, you have records for each one of your leads. These records contain all relevant information about each prospect's recent activity and your sales team's interactions with that person. All of this data and all of these records add up to one complete view of your sales process with stunning detail.

Commvault harnesses the power of clean data to help drive sales growth

As an industry-leading data protection and information management software solutions provider, Commvault understands the value that data provides when it's harnessed to its full potential.

Commvault uses Salesforce and Data.com as a solid foundation for sales and customer data – resulting in complete and accurate firmographic records within 85-90% of their accounts. Commvault's sales team has the confidence that the information at their fingertips has set them up for success.

Data.com has helped to give our sales team the confidence that they can reach the right decision-makers in their accounts every quarter.

Drew Alexander
Director, WW Sales Technology & Analytics

3 Track Performance and Adapt

After building the right sales plan and relying on data to start selling, the third step to closing more deals is to track performance and pivot, based on results. No matter what every day brings, use data to boost your success in every deal and conversation.

For Sales Leaders

Throughout the new year, rely on sales data to make sure your reps are closing as many deals as they can. Can you easily check your team's numbers on closed/won business, expected to close, forecast, quota, and more? If not, an app like [Sales Wave Analytics]() can help you quickly review pipeline visibility, team performance, and opportunities to increase sales. From actionable insights at your fingertips to customizable dashboards and data views, Wave will empower you to turn sales insight into action.

Every sales manager struggles with getting the right answers from the right data. Often, customer data lives across a variety of systems and formats. Make sure you're consistently answering these questions with data – and encouraging your reps to do the same:

- Who is my next big customer and which segments should we target?
- Which existing line of business should we grow?
- How are revenue streams performing compared to previous months/quarters/years?

You can also use data to motivate your teams to higher levels of performance. You probably already offer a compelling compensation plan with quarterly spiffs and contests. But

you can also keep reps more focused day-to-day by sharing sales performance data and creating a bit of internal competition.

Whatever data you use, make sure it's accessible from your mobile device so you don't waste time simply because your laptop isn't nearby. Wherever business takes you, let data take you to the next level, staying flexible so you can add greater coverage to the areas that need it most.

INSIGHT ⟶ ACTION

For Sales Reps

To start closing more deals, it's key to regularly track your own lead and prospect data and adapt your personal selling strategy accordingly. Here's a critical tip to closing more deals starting right away: Don't spend three weeks on the road without looking back at your goals. Instead, take time to consistently reflect on your numbers and track performance.

Build a sales dashboard personalized with the numbers most critical to you, and return to it often to reflect on what's working – and what's not. An app like Sales Wave Analytics makes this easy with robust filtering options and a visual interface that make it easier to identify patterns and insights.

Only with data can you adjust and improve your selling tactics after your plan has been set and you've started relying on data to make sales calls. After a few months have gone by and you've established a baseline, you can also use data to simplify your sales process. Find out where people get stuck in making the decisions. If you're losing people because they're not deciding to change from the status quo, then you need to look at what you can do to make it easier for them.

Rely on data to qualify and route leads more effectively as you sell more. Go into every sales call armed with a 360-degree view of your customer, from information about their company to their latest social media posts.

Track your leads through the entire sales cycle and always have the next steps and right information on hand. The more you sell, the more data you'll have about what works, improving results with every click.

Anytime you review your sales numbers, don't let them sit there – take action. Whether you're a manager or a rep, always act on what you've learned and adapt accordingly, focusing your selling efforts on the prospects, territories, and products that make the most sense.

HydraForce keeps all its processes flowing at full power

CHALLENGE

No cross-department single view of customers

Customer requirements slipping through the cracks

Inefficiencies caused an inability to keep up with demand

SOLUTION

Provide collaboration and visibility across multiple lines of the business with Salesforce CRM

Custom apps now track complex engineering projects from sale to delivery

Full marketing tracking thanks to hubspot integration

RESULTS

Every team can go to one record to track project status

Increased communication across the organization

Provided accountability within and across all departments

Visibility into processes and key production and throughput metrics

PRODUCTS

Sales Cloud

Platform

40%

faster processing of engineering projects

12%

decrease in time it takes to reach task milestones

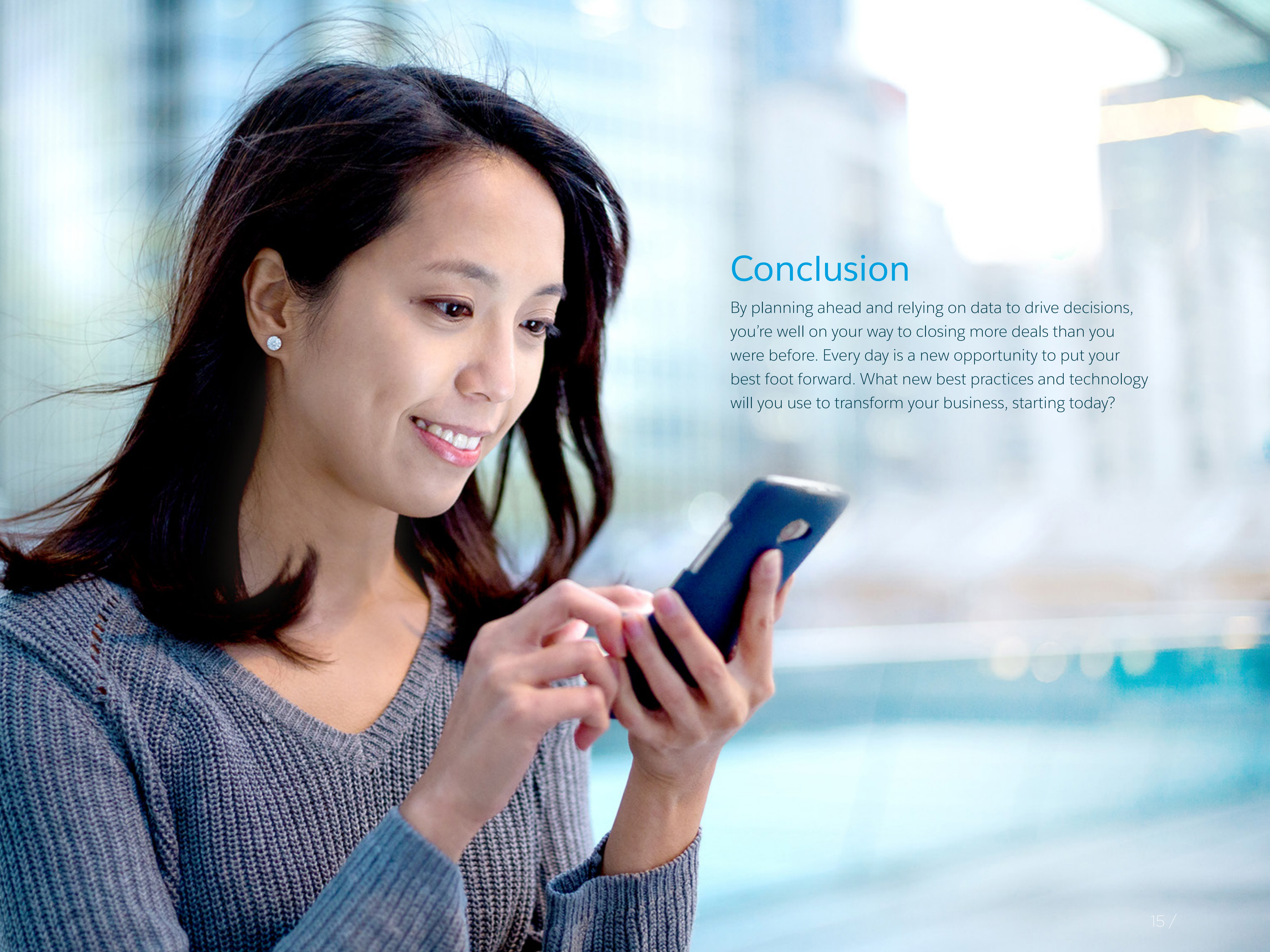
"I don't think you can put enough emphasis on how efficient Salesforce made our team."

David Price
Marketing Communications Manager

WHO IS HYDRAFORCE
Privately held and 1,100 employees strong, HydraForce is the world's #1 manufacturer of electro hydraulic cartridges valves and controls for heavy equipment and industrial machinery. It holds manufacturing in North America, Europe and Asia, and is supported by 120 stocking distributors across the globe.

MANUFACTURING
Sales Cloud, Platform

HydraForce
POWER FORWARD



Conclusion

By planning ahead and relying on data to drive decisions, you're well on your way to closing more deals than you were before. Every day is a new opportunity to put your best foot forward. What new best practices and technology will you use to transform your business, starting today?

Resources You May Also Like:

DOWNLOAD E-BOOK

DOWNLOAD E-BOOK

DOWNLOAD E-BOOK

CONNECT TO YOUR CUSTOMERS
IN A WHOLE NEW WAY