5 Quick Ways to Clean Up Your Sales and Marketing Pipeline

salesforce small business

Introduction

Small businesses and startups are known for running agile, streamlined operations. With so many things going on and only a handful of employees, there always seems to be endless work with limited time to complete it. One of the things that stalls productivity is a slow sales pipeline, taking the focus off more promising opportunities. Even worse, the biggest opportunities can fall through the cracks after teams have invested a lot of effort. Both scenarios are costly in terms of time and money.

Cleaning up your sales and marketing pipeline can seem like a chore. But if you don't perform regular maintenance, it will only fill up with more and more opportunities that are unlikely to close. Don't let the clutter distract your sales organization from focusing on the right deals. We've identified five ways you can tidy up your pipeline. They won't be a drain on your time; we promise!

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Chapter #1

Identify Your Ideal Customer

New customers are the lifeblood of any business, and small businesses don't always have the same resources as larger companies to find these prospects. In fact, in our recent survey, small business sales teams identified "acquiring new customers" as their top priority. So instead of casting a wide net and trying to capture as many prospects as possible, it's more cost-effective for smaller companies to focus on targeting their ideal customer. Lets look at a few ways you can identify your ideal customers.

Define your ideal customer

Prospects respond to messages differently. For example, you wouldn't necessarily sell the same way to a manager as you would to a CEO, or an IT employee versus an HR worker, so it's important to take this into account when you develop your messages. You'll want to consider these things:

- **Industry:** What industry are you targeting? Are there specific messages and personas to take into consideration?
- **Organizational characteristics:** What size are the companies you're targeting? Are they small and medium-sized, or global with multi-national channels?
- **Location:** Where are your customers geographically located? Are there cultural or language influences to take into consideration?
- **Purchase history:** What does the selection and sales process look like? Which employees can make purchasing decisions? Who needs to be involved in the process?

Understand your prospect's challenges

Your customers are just as busy as you are, so they'll be more inclined to listen to your message when it offers a solution to their challenges. Consider all of the reasons why a prospect might need your product or service. Does it save them time? Money? Does it make their lives easier due to efficiency or convenience? It's important to show your prospects how you're going to help them as you develop your message.

Realize what drives their purchasing decisions

Understanding what motivates your customers to buy, or what deters them from exploring all their options, helps you determine your sales approach. To build trust and add value to your product or service, it's critical to understand what your customers are attracted to and what their apprehensions are. Since you have already figured out what your customer's challenges are, and you know your company's own strengths, it's now time to figure out why they should select your services instead of your competition.

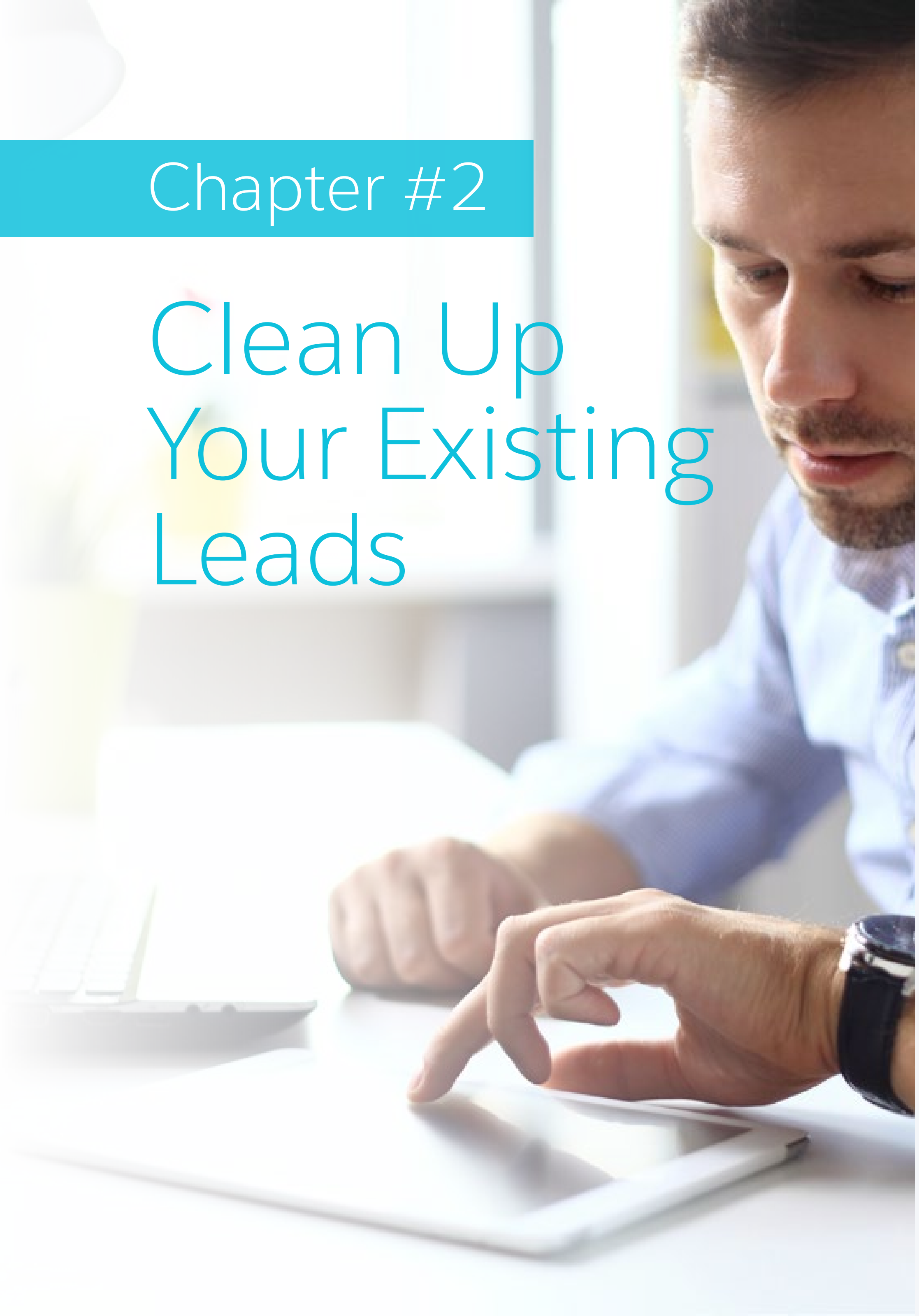
Maybe you can offer faster set-up and service of your product. Or you have a global account team that can respond to their needs quickly. Figuring out why they are hesitant to sign a contract with you immediately requires a little more communication and relationship-building. Yet it's extremely valuable so you can develop a plan for anticipating and reducing any apprehensions they have.

"For a long time I was looking for my perfect equilibrium, my mojo. And now I think I'm getting there: I've found my customer, my silhouette, my cut."

Alexander McQueen, Fashion Designer

Ready to learn more?

Elevate your business performance by positioning your target audience as experts. [Check out the key advantages and opportunities here.]



Chapter #2

Clean Up Your Existing Leads

Everyone could use a good spring cleaning now and again, even the most tenured businesses. Cleaning up your existing prospect database gives you a bird's-eye view on the breadth and depth of your potential customers. Here's how to get started:

Data confidence

Have you ever had shipments delivered to the wrong place because a customer didn't tell you they moved? Or had invoices that went unpaid because your contact left the company? Small lapses in data cost big money. In today's data-driven business world, having accurate, reliable data is a must. If you never verify your records, you could potentially waste time and effort by using outdated, inaccurate data to make business decisions. Clean data makes all the difference in continually driving business growth. In particular, tools like Data.com can help fill in the blanks to find new prospects and enrich existing data so you can get a clearer picture of your prospect base. Once you have confidence in your data accuracy, you can execute your strategy with peace of mind, knowing that you're targeting the right leads at the right time.

Increased productivity

Keeping data clean can be a never-ending challenge because today's business environment is constantly changing. Did you know that 70 percent of a company's data becomes outdated annually? That's super time consuming to update! It's also part of the reason why salespeople are only spending 34 percent of their time actually selling. It would make more sense if your sales teams spent the majority of their time doing what they do best. Data.com Clean does the heavy lifting for you by automatically matching its updated, constantly refreshed database against your CRM, leaving your records complete, current, and accurate. Ultimately sales teams spend less time on administrative tasks, knowing that the data is accurate, which allows them to focus on opportunities and selling.

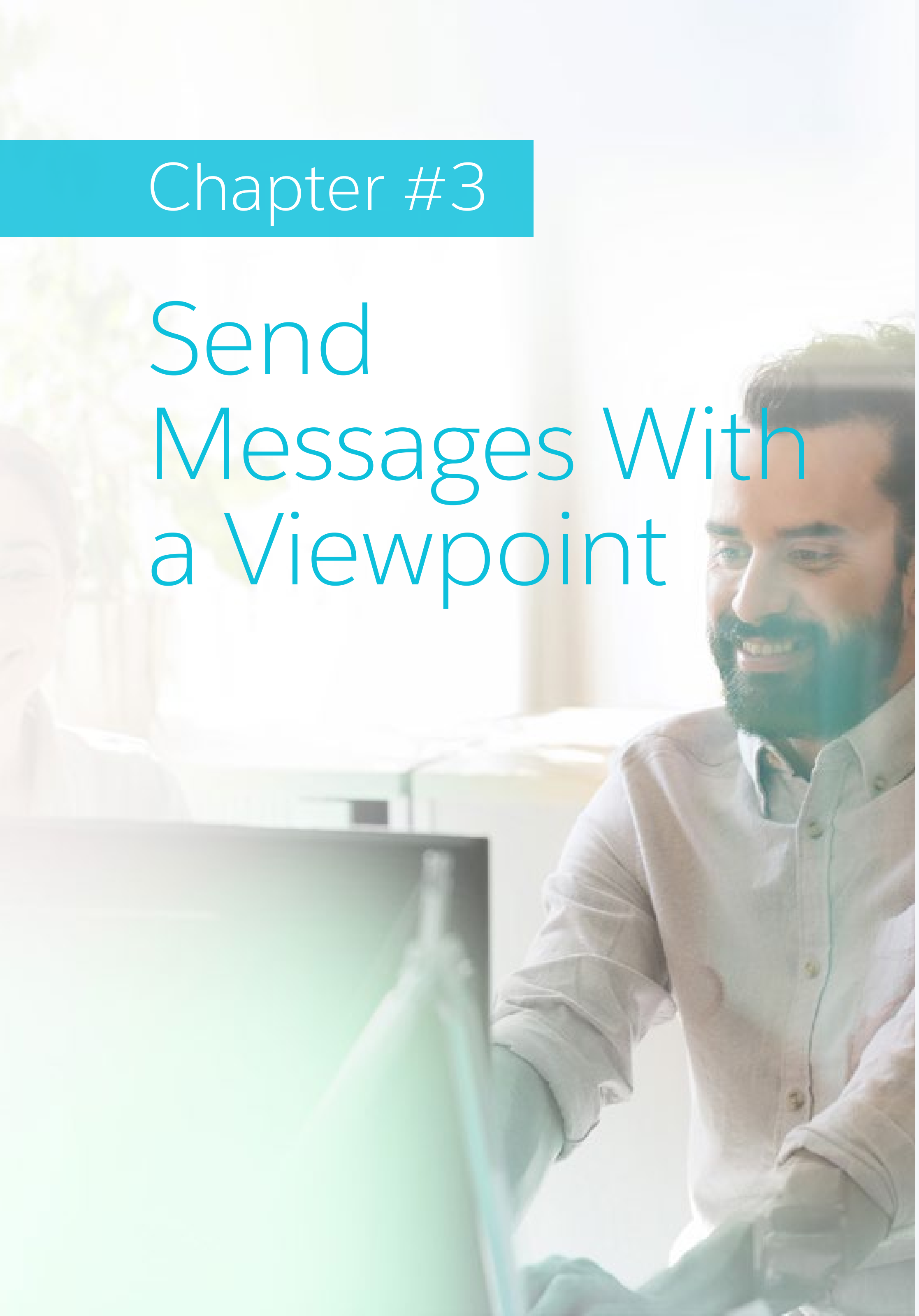
Enhance lead quality

Because Data.com helps complete missing information, the overall quality of your prospect database improves. By enhancing your data with valuable information like industry trends, corporate hierarchies, market prescreen, and up-to-date news, you're arming your sales team with a more complete view of the prospect. When users have access to fresh, accurate data in real time, they can view the clean status of lead, contact, and account records before taking action. Teams can confidently plan territories, identify key market segments and target customers with precision.

70 percent of a company's data becomes outdated annually.

Ready to learn more?

Your CRM engine is only as good as the the customer data fuel you put in. Click here to learn what dirty fuel is costing your business, and how you can use advanced customer data to boost performance.



Chapter #3

Send Messages With a Viewpoint

Buyers want to find ways to solve their specific challenges, so it's important to communicate how your business can do exactly that. However, today's customers have come to expect personalized, tailored service. In fact, 65 percent of buyers report that they only engage with a vendor or sales professional when they have already made a purchase decision. So if they don't hear a message that is relevant to their business or problems beforehand, they'll move on. Target new prospects by crafting messaging that has a point of view.

Goodbye, call scripts

Today's informed buyers keep sales teams on their toes. Many sales teams used to operate using call scripts and datasheets, but customers nowadays are seeking a much more relevant message – as relevant as a Google search can deliver. It's critical for sales teams to understand their prospects, educate them, and provide the best customer experience possible. Updated data helps sales reps cut to the chase and show prospects what's important to their business at that very moment. Use your CRM to access real-time contact changes, industry updates, and insights from your prospects' social channels to deliver the right message at the right moment.

Personalize the buying experience

Pardot marketing automation makes delivering highly targeted messaging easy. You can create segmented lists, tailored to your exact specification, and use an intuitive email editor to send precise messages to target contacts. Then, using Pardot's analysis features, you can further understand which emails and content are resonating with prospects. Want to get even more targeted? With Pardot, you can dynamically change email and website content based on a prospect's score, grade, industry, job title, and more.

Create action

Regardless if you are speaking with prospects or sending emails, you always want to create more interactions to build a relationship with prospects. Figure out what your next step is going to be with a prospect, before the end of a call, even if it's just a follow up email or you providing more information. Include calls-to-action in your emails, blog posts, and social media posts. Every form completion, open email, click-thru and call can increase a prospect's score, give you more insight into their interests, and drive them closer to conversion.

When asked about their buying processes 65 percent of the respondents agreed that "We usually engage a vendor sales professional only when we have made a purchase decision."

IDC 2015

Ready to learn more?

Want to get into a prospect's head? Read up on [4 critical tips on messaging psychology.]

Chapter #4

Develop a Plan for Lower-Scoring Leads

In a perfect world, all leads that come your way are quickly transformed into customers. However, that isn't always the case. Do you have a plan for handling lower-scoring leads? If not, it's time to develop one in order to streamline your pipeline.

Leads in limbo

Not all leads are terrific, but it doesn't mean that a company should just drop them when they aren't jumping up to buy your product or service. Some leads need a little more time. So how is your team going to handle them? Do you have a plan for them or do they just get pushed to the side indefinitely? If you do have a strategy, is it communicated to your sales and marketing teams? Having a nurture plan for lower-scoring leads helps you make the most out of the leads you've obtained.

Nurture your leads

Lead nurture programs are an invaluable tool for managing lower-scoring leads at companies utilizing marketing automation solutions, such as Pardot. This process gradually educates lower-scoring leads into a more sales-ready state via a series of automated emails designed to trigger actions and responses. Relationships are built naturally over time by providing leads with valuable content that educates them. Especially if you're working with limited resources, the benefits of implementing a cold-lead nurture program are numerous:

- *Easy setup*: Campaigns can be put together easily using your existing marketing content.
- *Action-based triggers:* Your messages will always be relevant as they are sent only when the specific conditions you determine for each message are met.
- *Automate repetitive tasks:* Nurture campaigns are scheduled and will run automatically, freeing you to work on high-scoring leads.
- *Get notified:* Real-time notifications alert you to a specific behavior from prospects.

You also don't have to be a marketer to nurture leads. Salesforce Engage gives sales reps access to marketing-approved nurturing tracks and email templates, giving them the ability to create personalized messages. When reps encounter a prospect that isn't ready to buy yet, the prospect can be added to a nurture program with one click, right from a rep's desktop or phone. Then when the moment is right, real-time alerts let reps know when a prospect is ready to be contacted. Leads falling through the cracks will be a thing of the past.

"Sales is not about selling anymore but building trust and educating."

Siva Devaki
CEO & Founder of Mansa Systems

Ready to learn more?

When marketing and sales work together effectively, they become an unstoppable force. Together, they're the ultimate power couple. Find out how they win, together.

Chapter #5

Follow Up on High-Scoring Leads

Of course, one of the easiest ways to clean up your pipeline is to pick the low-hanging fruit. High-scoring leads are ready for sales interactions and should be fast-tracked. If they look like your existing customers and seem like a good fit, don't take the 'wait-and-see' approach. Reaching your prospects before competitors allows you to get ahead of the curve so you can say hello to more closed-won deals!

Arm your team for success

Just as you should have a plan for low-scoring leads, you should also have a strategy for hot leads. Yes, you want to go after these hot leads right away, and while doing so you also want to ensure that your sales team is operating at its fullest potential after deciding to invest time in closing those deals.

The first step is to ensure that all of your reps have gone through a formal training process. Making the knowledge transfer and ramping up your reps is a big task. Make sure that all team members understand the sales cycle and how sales works with marketing. Be sure to check skill retention regularly for maximum effectiveness.

Now imagine this scenario: your team uses Salesforce Engage to monitor real-time prospect engagement within Salesforce. You are commuting to work when you receive a notification alert from Engage Alerts on your phone. A prospect has looked at your pricing page, signaling interest to buy. What happens next? You need to have a single follow-up strategy in place, making sure the whole team is following up in a timely manner by using your CRM to track commitments.

Just like dating, sometimes a hot prospect just doesn't work out. Even though you may be hesitant to use one, it's a good idea to have a break-up strategy in your back pocket. It's important for a salesperson to know when to walk away, instead of leaving a cold lead to clog your pipeline. Maybe your last-ditch effort at contacting the prospect could rekindle interest.

Prep for the first call

Most of the time, your product isn't going to sell itself. In the past, a sales call included a pitch, some information, and a handshake. Not anymore! Customers have access to more information about your company and product. Your sales team needs to know just as much about a prospect. The goal of a first call is to discover why the prospect needs your product and under what circumstances they will buy it. How you prepare for a first call can have a huge impact on the outcome. For example, it's important to:

- Preview previous notes or engagements your company has had with the prospect
- Research their company's webpage, blog and social channels
- Understand their industry and top competitors
- Prepare some questions so you receive the answers you need to determine whether or not the prospect could be your next customer

Tools like Data.com Prospecting Insights can provide all this information at your fingertips, right inside your CRM, so you can get your pre-call research done fast.

> The most effective B2B sales firms are 22 percent more likely than all other sales firms to reinforce training at least once each quarter.
>
> Aberdeen Group

Ready to learn more?

Master phone calls and turn them into sales. Read up on 5 tips for making a great first impression on a B2B phone call.

Conclusion

Your sales pipeline is your future revenue, so it pays to keep a careful watch over it. By regularly monitoring your pipeline, you ensure that it's always stocked with fresh opportunities. Take the time to identify and target your ideal customer as it leads to higher quality leads. Enrich existing lead records with trusted data to get key insights, allowing you to personalize the buying experience for them with relevant messages. Remember to develop plans for nurturing lower-scoring leads and strategize on taking immediate action for high-scoring leads. By keeping your pipeline running smoothly, even the smallest sales team can create a repeatable cycle of success.

MOVE YOUR BUSINESS FORWARD, FASTER.

For decades, being “the little guy” has been a disadvantage, but not anymore. Salesforce can help jumpstart business growth. Salesforce streamlines operations, allowing you to increase your win rates, grow your pipeline, and decrease your costs.

Learn more ›

32% Improvement in win rate.

40% Increased sales productivity.

32% Increase in sales revenue.

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SALES SERVICE MARKETING COMMUNITY ANALYTICS APPS

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5 Secrets to Building Your Sales Pipeline

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