salesforce pardot

A Day in the Life of a Sales MVP

5 things top-performing sales reps are doing differently.

Top-performing sales reps know something you don't.

The key to sales success is simple: be first, be relevant, and be productive.

Sound impossible? Not anymore. In fact, today's buyers expect a personalized and efficient purchase experience, and the true sales MVPs know how to deliver it without breaking a sweat: all it takes is a little support from their marketing team and the right tools to get the job done.

To illustrate, let's take a look at one such MVP: a mid-market sales rep named Anna, who mastered the art of quota crushing with a little help from her marketing sidekick, James.

It's a story of two ordinary people — Anna is a sales rep who dreams in quotas, while James is a marketer with high aspirations to impact his business. But with a little help from James, Anna became a force to be reckoned with; an unstoppable deal-closing machine. With the right strategy and tools, Anna went from ordinary to extraordinary.

With the right tools and strategy, Anna became a sales MVP.

Anna: Pre-MVP.

It's important to note that before Anna unlocked the secrets to a perfect sales strategy, she was very much an ordinary sales rep. In fact, many of her struggles may sound all-too familiar.

Anna was frustrated. Every time she picked up the phone, it was another dead-end lead, either completely unqualified as a prospect or in no way ready to talk to sales — a complete waste of her time. How was she supposed to hit quota when James and his team kept passing over duds? What were they doing all day anyway, writing Facebook posts?

But on the other side of the office, James also had frustrations. Why was sales always pushing for new and better leads when the ones he was passing over weren't even being worked? And what about all of the content he was producing — why weren't reps using it to educate prospects on the value of the product? When was anyone going to realize the potential value of his marketing?

These were dark days for our soon-to-be deal-closing power couple — and for their business as a whole. But in the end, their struggle came down to three main issues:

- A lack of communication and alignment of goals
- A lack of insight into each team's interactions with customers
- Disparate and disconnected tools

By investing in the right tools and making some minor adjustments to their strategy, Anna and James were able to change the entire way their company does business. With Anna and James aligned and in-sync, Anna was able to respond to every inquiry faster than the competition, she nailed every sales conversation with personalized, helpful information, and their bottom line saw huge wins.

How did they do it? Anna and James found a secret weapon: Salesforce® Engage.

The MVP's Secret Weapon: Salesforce® Engage

Salesforce® Engage is a new solution from Salesforce Pardot — and a complementary product to the marketing automation platform — designed to help sales sell more effectively than ever before. Salesforce® Engage uses information or content that's been gathered or created in Pardot to empower sales reps like Anna in several ways:

- **Engage Campaigns** give reps access to a library of marketing-approved email templates and nurturing tracks, and allow them to create ad-hoc messages with an easy-to-use editor.

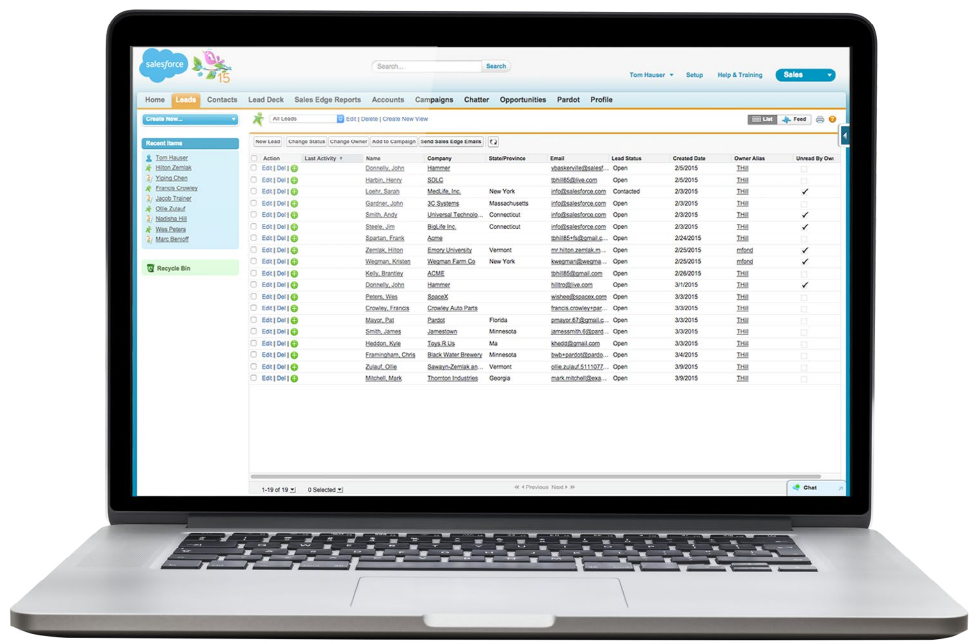
- **Engage for Gmail** empowers reps to use their Gmail accounts to launch Engage Campaigns via a simple plugin that tracks all interactions. With the Gmail side panel, reps can even view a prospect's score, grade, and demographic and behavioral data, as well as add them to or remove them from a drip campaign.

- **Engage Alerts** notify reps of prospect actions and help them start conversations, with control over which activities appear in their feed.

- **Engage Reports** give reps advanced insight into how their campaigns are working for them, including data on date sent, time opened, clicks, opens, and click-through rates.

Giving your sales reps Salesforce® Engage is like giving them access to their own personal assistant from the marketing team — and letting them see what's working and what's not helps them go back to marketing with data-driven feedback and ideas.

So what does using Salesforce Engage on a daily basis actually look like? Let's get back to the story to see how the right technology helps Anna win deals faster — every day.



The Perfect Email to Re-Engage

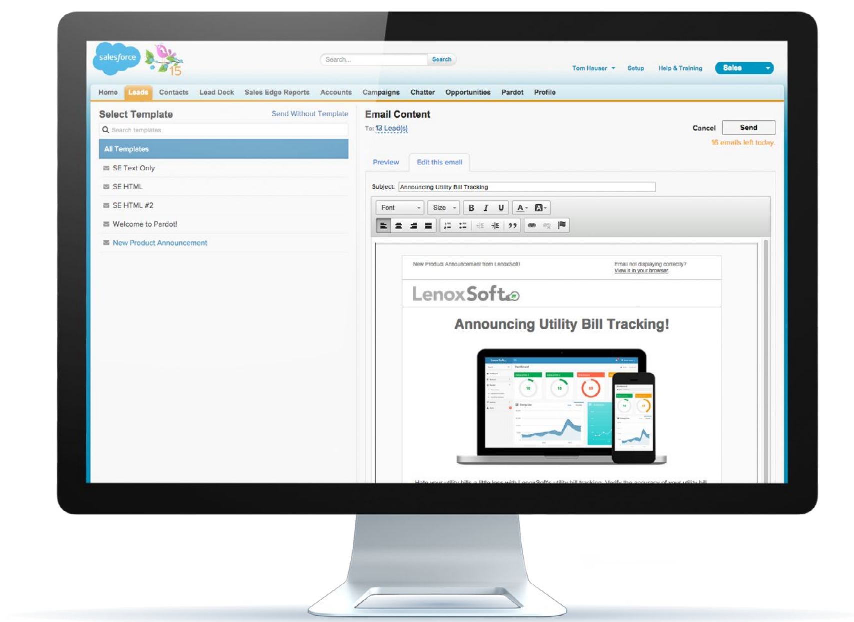
Monday | 9:00 AM

Sitting in Monday morning's sales meeting, Anna is feeling refreshed, energized, and ready for the day. With three weeks left in the quarter, Anna is gunning for the coveted spot of number one rep in her segment.

Anna's attention is drawn to the front of the room. James, their Marketing Operations Manager, has an announcement that he thinks will interest the reps: in three week's time, the company will have a booth at a popular trade show in Boston. His team has planned for an exciting presence, with a great booth placement, fun giveaways, and lots of reps on hand to demo their latest product releases — all in all, a great opportunity to make a good impression on a potential customer.

As James describes the upcoming event, Anna's interest is piqued. She has a number of prospects in the Boston area, several of whom she's been struggling to coordinate meeting times with. She quickly asks James if he can draft up an email with all of the relevant event information.

Back at his desk, James goes to work. He opens up Pardot and builds a simple but attractive text-based email with their booth number, a brief pitch on why to stop by, and some of their most effective marketing messaging. He includes some variable tags to make sure each message is personalized, then checks a box in the template settings to make it available for 1:1 use. Satisfied that this message will drive engagement and still look natural coming from his reps, he sends a quick email to the sales team to let them know that the template is now ready for sending.



11:45 AM

Anna is wrapping up her morning and getting ready to head to lunch when she notices James' email about the template. In Salesforce, she quickly pulls up a list of her Boston prospects, selects all, and hits "Send Engage Campaign." As a list of templates pops up on the left of her screen, she selects a new template called "Upcoming Boston Trade Show" and quickly tweaks the wording to include her favorite one-liner. After scanning a quick preview of how the personalized email will appear to one of her prospects (wow, James put together a great email!), Anna hits send and closes her laptop.

12:15 PM

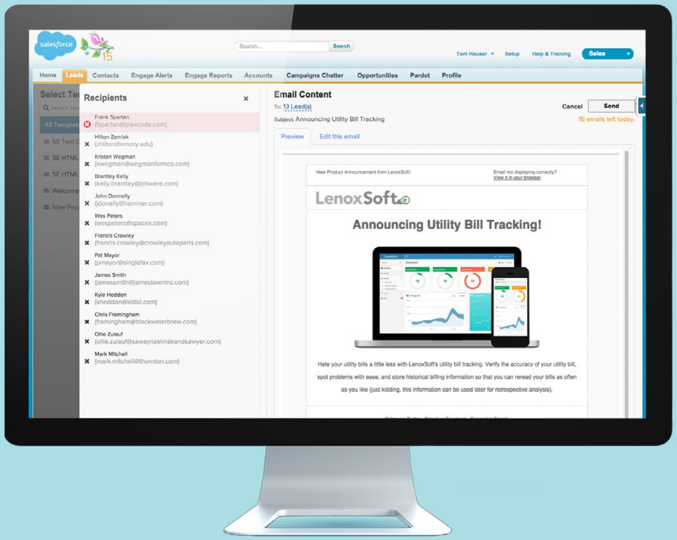
Over lunch, Anna feels her phone buzz: a prospect has replied to the Boston Trade Show email!

Hi Anna, Thanks for reaching out, I actually already had plans to attend the trade show so this works out great! I will make sure to drop by the booth for some information and will connect with you after the show. Thanks!

Anna forwards the email to James:

Thanks for the help! These event emails are really effective.

She feels satisfied with a productive morning.



FEATURE HIGHLIGHT

Engage Campaigns

Engage Campaigns increase the quality and personalization of interactions by allowing reps like Anna to:

- send beautiful 1:1 or 1:many Pardot-tracked emails from directly within their CRM.
- access marketing-approved email templates, modify with a WYSIWYG editor, and preview the final product before sending.
- add or remove prospects from campaigns anytime, anywhere— via the web, desktop, or mobile app.

Follow-Up: Simplified

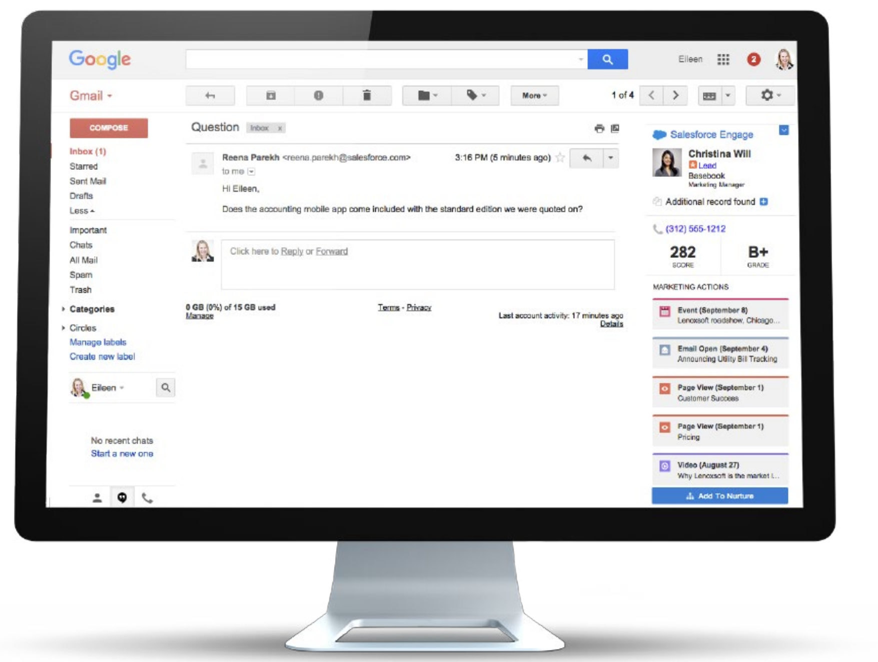
Tuesday | 8:45 PM

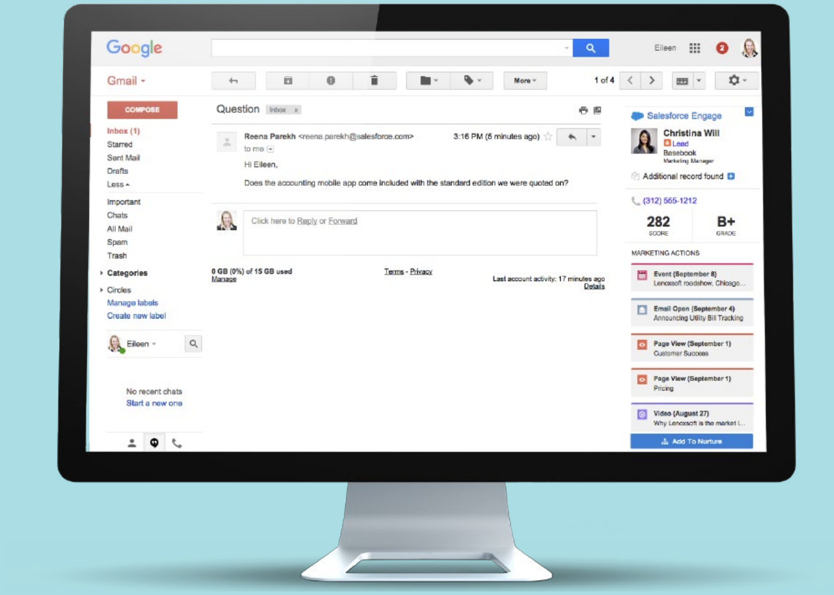
As Anna settles in to watch TV, she opens her laptop for one last email check and finds another response to the event email:

Anna, Sorry I haven't responded to your last couple of emails; things have been extremely busy around here but we are still interested in your solution. Unfortunately I will not be able to attend the tradeshow, but would you be available for a product demo later this week? Thanks.

With a jolt of excitement, Anna opens her Gmail side panel and quickly scans the information on this prospect — their company, score and grade in Pardot, a link to their Salesforce record. Just as she thought, this is a major deal that she'd nearly given up on after several weeks of unanswered emails and voicemails! In Gmail, she immediately clicks Reply, and begins crafting her response with possible demo times and a few additional resources that could be helpful to look at ahead of time.

Because of the Salesforce® Engage Gmail plugin, Anna is able to send a tracked Pardot email directly within the Gmail interface. A small blue Salesforce cloud appears at the bottom of her Compose box with the options to "Track Clicks with Pardot" and "Track Opens with Pardot." Anna clicks both and sends off her reply, already excited to check back in the morning to see if her email has been opened and clicked on.





FEATURE HIGHLIGHT

Gmail Plug-in

Engage for Gmail empowers reps to use their Gmail accounts to launch Engage Campaigns via a simple plugin that:

- can be activated in one click (after installation).
- tracks all interactions, ensuring that all emails sent from Gmail are logged in the prospect or lead account in Pardot and Salesforce.

Nurture Leads — Anytime, Anywhere

Wednesday | 8:30 AM

First thing Wednesday, Anna is waiting to catch a train. She pulls out her phone and opens her Salesforce1 app to get a sense of her day. Using the filters that she's set up for Sales Alerts, she's able to view the past four days-worth of activities from a group she's identified as "Hot Prospects," and is pleased to see she has a long list of downloads, page views, and social interactions.

Curious to see how her list of Boston prospects has been doing since her email on Monday, Anna quickly switches over to filter by geography and looks at her Boston-area prospects. She's excited to see an increase in activity since her email; it seems a number of her Boston prospects have decided to check out the website again, and a few even downloaded resources (still no opens, clicks, or responses to her email about a demo from last night, but she'd give it some time).

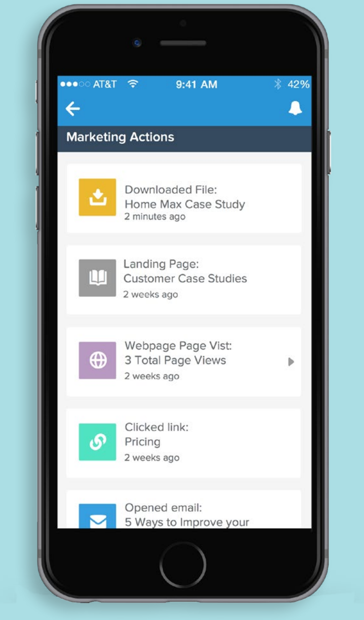
However, Anna does notice one particular prospect in this group that hasn't opened or clicked her email — and she isn't surprised. She hasn't heard from this prospect or received any notifications of activity in over five months. It's time to pass this lead back to marketing.

Anna recalls an announcement that James made in a recent sales meeting: the marketing team had created a new lead nurturing campaign for colder prospects, aimed at getting these prospects to re-engage with the website in some way. Over a nine-month period, the prospect would receive occasional emails with a very sales-light message:

Thought you might enjoy this article about saving on energy costs at your business.

The emails would appear to be one-off emails from the assigned rep, to maintain a consistent buyer experience if the prospect decided to re-engage and speak with the rep.

Anna opens her unresponsive Boston prospects' profile, and with one click, adds him to "Re-engagement Drip" — just as her train arrives at the platform.



FEATURE HIGHLIGHT

Mobile Capabilities

With the mobile capabilities available through Salesforce® Engage, reps can:

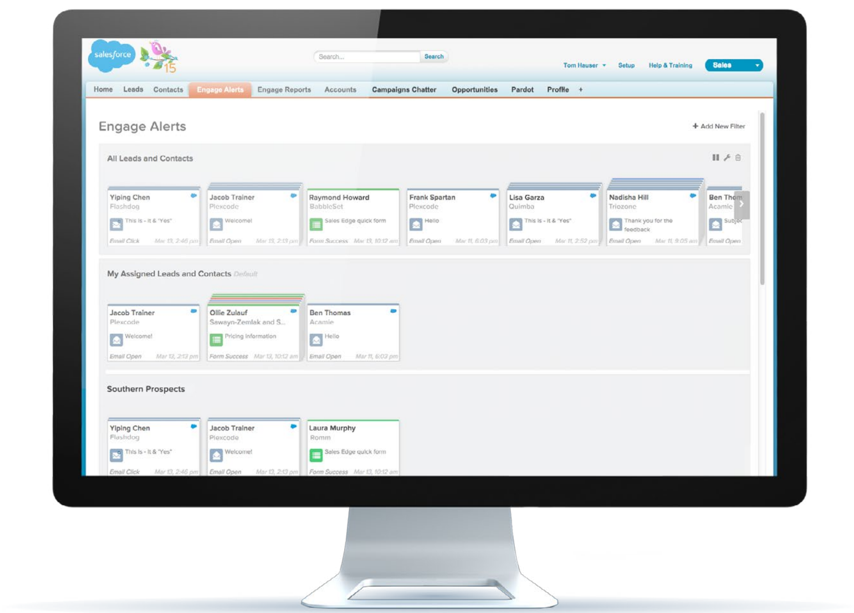
- view a customizable feed of real-time prospect activity anytime, anywhere on the Salesforce1 mobile app.
- access in-depth engagement history on the lead or contact record
- add or remove prospects from nurturing campaigns on-the-go with one click.

React in Real Time

Thursday | 1:15 PM

Thursday afternoon, Anna is brushing up on her product knowledge before her 2pm demo with her Boston prospect. As she's reading through articles, a Sales Alert pops up on her screen: the prospect she's about to do a demo for is currently browsing a page of their website that explains a specific product feature. Jackpot!

Anna quickly pulls up Engage Alerts in Salesforce.

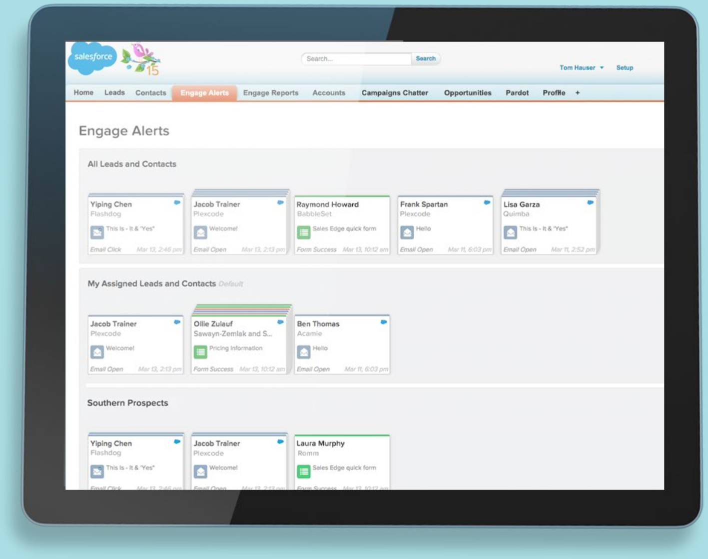


Looking at the past four days of history, it looks like her prospect has visited three different pages that relate to this feature — and not much else.

Anna remembers another recent announcement from James: a case study released by the marketing team about a customer that had seen phenomenal success with this particular feature. She pulls up her templates again and browses through...aha! Anna sees the template that James referenced, highlighting an impressive stat and linking to the case study as well as an e-book with more details on the feature. Anna opens the template with her WYSIWYG editor and begins editing the copy to work as a follow-up email to her demo.

Thursday | 1:59 PM

Anna dials in to her demo feeling confident. She knows where her prospect's interests lie, she has resources on hand that can help to answer his questions, and she's ready to lead the conversation in the direction she wants it to go.



FEATURE HIGHLIGHT

Engage Alerts

Engage Alerts give reps the insights they need to lead the conversation through:

- a real-time feed of prospect activities with customizable filters, accessible with Salesforce login credentials and available on the web, desktop, or mobile app.
- up to four days of history on a specific prospect.
- customizable real-time alerts of prospect activity on desktop.

See Success Instantly

Friday | 3:30 PM

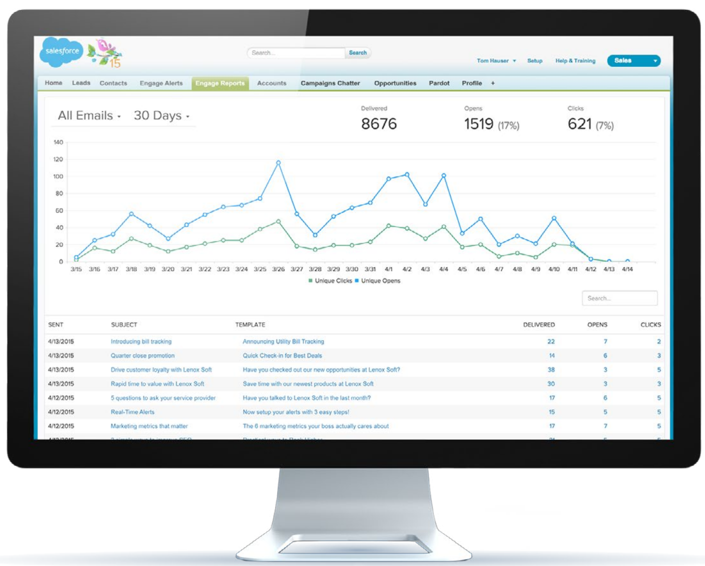
With the weekend only hours away, Anna reviews her activities of the week before her Friday check-in with her manager. She pulls up her Salesforce® Engage Reports to see how her emails performed throughout the week.

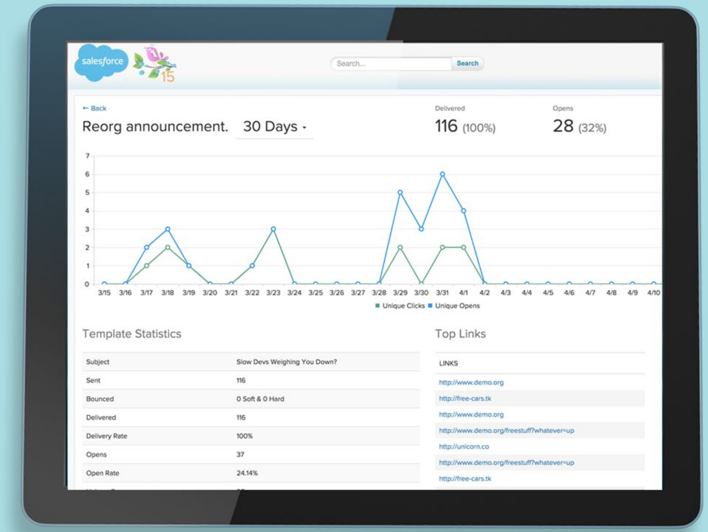
Anna's excited to see that her Engage Campaigns have performed well across the board – lots of clicks and opens. She notices that a large number of her Boston prospects didn't open her Monday email until Tuesday and makes a note to herself to send a reminder email about the event the following Tuesday.

Something else interesting catches Anna's eye. One of her most effective emails of the week was an Engage Campaign she created on her own, without a marketing template — a short email about a simple product update that she sent to all of her assigned prospects. Click-through rates were off the charts on this email, and Anna remembers seeing a number of prospects active on the site after she sent it out.

On the way to her end-of-week check-in, Anna swings by James' desk and shows him the graph. If the email resonated so strongly with her prospects, perhaps it would be worth creating a template for all of the reps to use? Clearly this product update, however small, addresses a pain point that resonates even better than anticipated.

James is very grateful. Creating an email template for this update is a simple task that may prove to be extremely helpful for his sales team, and he knows the perfect piece of content to include in the email. Plus, now he has another great announcement for Monday morning's sales meeting.





FEATURE HIGHLIGHT

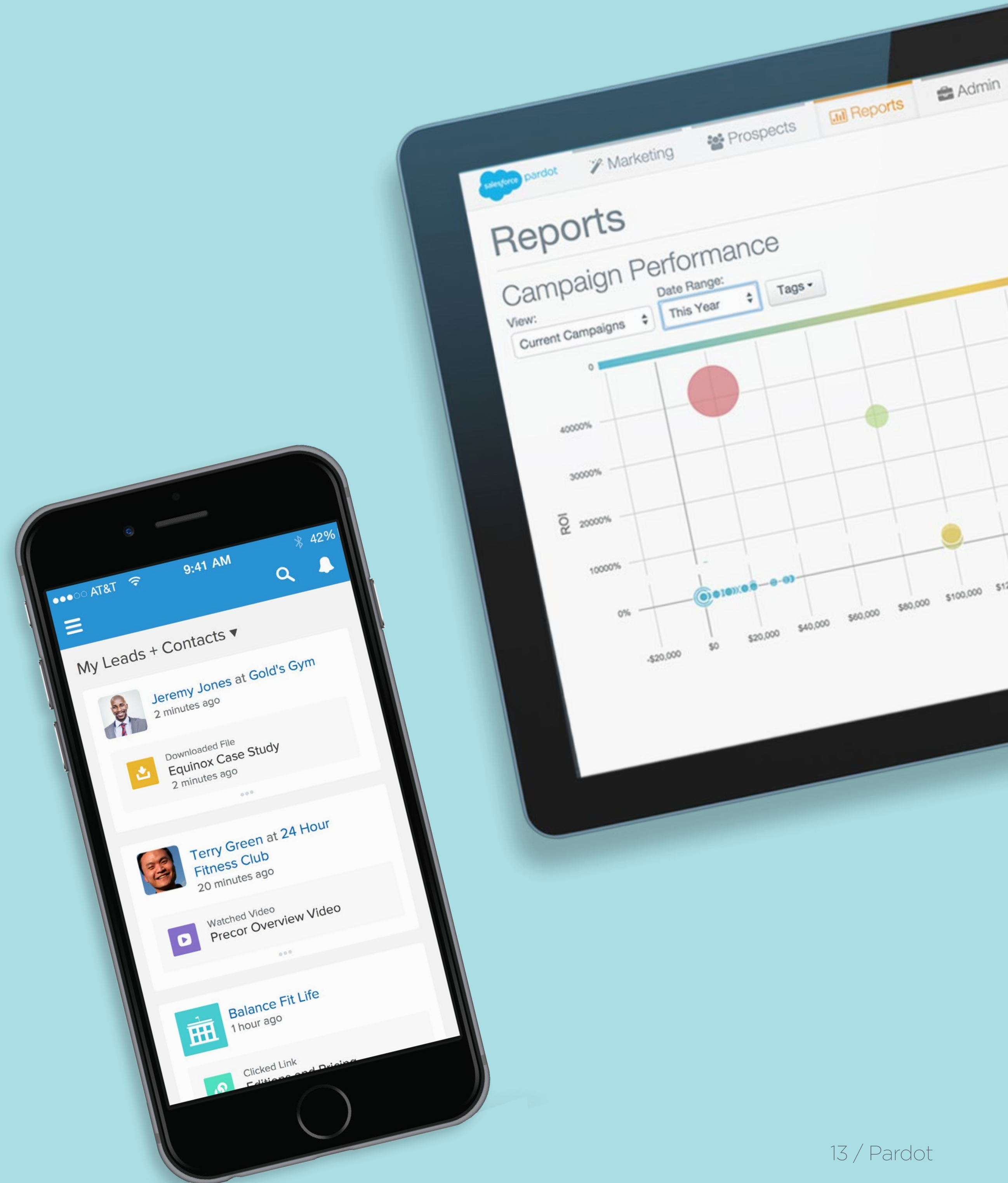
Salesforce® Engage Reports

Engage Reports allow reps to monitor and control the success of their own campaigns with:

- interactive, graphical dashboards displaying clicks, opens, and click-through rates of sales emails sent through Salesforce® Engage.
- insight into date sent, time opened, and related trends.

MVP Secrets, Revealed.

So there you have it: a week in the life of a deal-closing super team; all the secrets of our star MVP sales rep revealed. James effectively sets Anna up for the win, and Anna swiftly closes the deal — with all of the personalization and efficiency that her buyers crave. And the best news is this: any sales rep can follow in Anna's footsteps. With the right tools and strategies in place, you'll have everything you need to be first, relevant, and more productive than ever before.



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WANT MORE INFORMATION?

Pardot is B2B marketing automation by Salesforce.

Your customers are smarter, more capable, and better-informed than ever before. This new breed of consumer demands a better breed of marketing, and the Pardot platform has the capabilities to get you there.

LEARN MORE