

# TAKE THE LEAD

## SEVEN TIPS TO SALES SUCCESS



SELL. SERVICE. MARKET. SUCCEED



## TABLE OF CONTENTS

- 03 INTRODUCTION
- 04 ORGANIZE AROUND SKILL
- 05 KNOW THY TARGET
- 06 SHOW'EM YOU KNOW'EM
- 07 THE SECRET WEAPON: A REFERRAL
- 08 COLD CALLING IS NOT DEAD
- 09 SMART TOOLS = BETTER PRODUCTIVITY
- 10 MEASURE. THEN MEASURE AGAIN
- 11 3 THINGS TO REMEMBER



# INTRODUCTION

COLD CALLING: IF YOU THINK IT'S THE HARDEST JOB IN THE WORLD, MAYBE YOU'RE DOING IT WRONG.

Let's face it, most sales people dread making the cold call. Who wouldn't? Essentially, you're interrupting someone's day to get something you need out of them—information, a meeting, a new sale, you name it.

But picking up the phone is not only one of the best ways to connect with customers, it's one of the best prospecting tools you can have in your arsenal. It's the way to take the lead. And succeed.

CREATED FROM THE TEACHINGS OF THE BEST FRONT LINE SALESFORCE.COM MANAGERS, THIS BOOK WILL TELL YOU:

- Best practices to prepare for a call
- How to efficiently organize your sales team
- Tips on how to make a connection every time
- Why the phone beats email
- Great tools to measure yourself and stay organized
- A list of external resources for further study



# ORGANIZE AROUND SKILL

In baseball, there are starting pitchers and closing pitchers. They have very different roles on the team based on what they do best, all focused on winning as a team.

Your sales team is no different. To create new opportunities and sales pipeline, understanding everyone's skills is essential to playing the right people, at the right time.

At salesforce.com, sales managers identified four essential areas to success: in-bound lead qualification, out-bound prospecting, closing, and account management.

Identifying roles by skill sets has also allowed salesforce.com to create the right incentives to deliver the best results. So people who qualify leads are rewarded on volume whereas closers and account executives are rewarded on total dollars sold. Meanwhile, the team in charge of prospecting, business development reps, are rewarded on the pipeline generated (total dollar value of sales opportunities).



## SKILLS—WHAT TO LOOK FOR

### LEAD QUALIFICATION

Listening, gregarious, curious

### PROSPECTING

Improvisation, curious, listening

### CLOSERS

Negotiation, competitive, visionary

### ACCOUNT MANAGEMENT

Consultative, process oriented, collaborative

# KNOW THY TARGET

Selling to a customer shouldn't feel like a one-night stand. It should feel more like a courtship that will ultimately lead to a long-term relationship.

Though most sales people know this, many still make cold calls without enough preparation to turn even a short conversation into something more.

The best prospecting teams work with marketing and product teams to build extensive "personas" to discover who may be the best fit for the product. While prospecting tools such as Data.com for Salesforce can be a foundation

for these with insights into title, company hierarchy and company overviews, you need to go much further and deeper for a complete picture. A good "persona" details a prospect's motivations, outlines day-to-day job functionality, mentality, and most importantly, their biggest business pains.

Working out these things before you call will shape everything that happens after the first "Hello", putting you on much better footing to develop a selling relationship.



## WHO ARE YOU SELLING TO? (A "PERSONA" EXAMPLE) VP OF SALES OPERATIONS

### PRIMARY JOB GOAL

Help the VP of Sales blow out their number through increased productivity

### BIGGEST PAIN POINT

Lack of process and visibility

### HOW THEY ARE EVALUATED

Sales cycle length, rep ramp time

# SHOW 'EM YOU KNOW 'EM

Ever gotten a call that starts: “I’m just calling to touch base”? What’s the reaction you have? You immediately dismiss the person as a “fisherman” or someone trolling for a conversation that might lead to a sale.

So how do you develop a real reason to call that leads to more? It’s a 2-step process to building the background you need to make your calls as pointed as possible.

**Step 1:** Use a tool like Data.com to help you understand a prospect’s title, while also gathering D&B info 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 about how you can help them. Research their company’s current marketing campaigns. Dig into business news articles that might mention them.

**Step 2:** Using what you know, show them you have a vision for their business. You can do this by developing or choosing a pre-existing offer for them. Webinars, ebooks an ROI calculator, a white paper, or analyst report can all make it clear that you understand their business.

In short, make sure you have an idea about how you can lead them by helping them.



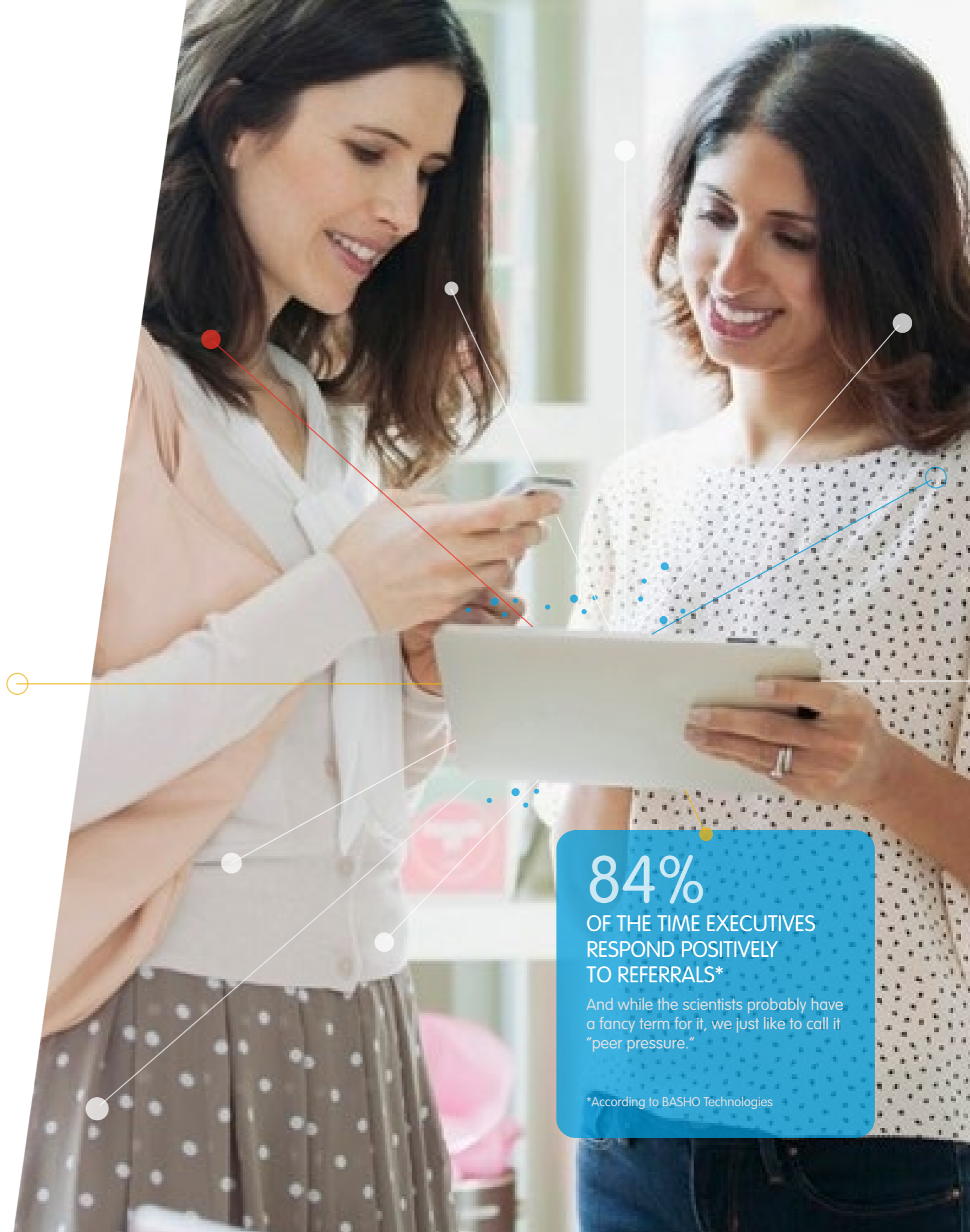
# SECRET WEAPON: A REFERRAL

The first goal of cold calling might be to get an in-depth meeting, but it's unrealistic to think that will happen with every call you make.

That doesn't mean you can't get the next best thing out of a call, namely, a referral.

Why? For one, it means the door hasn't been shut. And two, a referral gives you a new name to talk to, maybe

someone you didn't even have on your radar. Even better, because you've been referred, your call to that referral gives you credibility you can't get anywhere else. In fact, when you connect with someone based upon a referral, the likelihood they accept a meeting goes up. Way up.



**84%**  
OF THE TIME EXECUTIVES  
RESPOND POSITIVELY  
TO REFERRALS\*

And while the scientists probably have a fancy term for it, we just like to call it "peer pressure."

\*According to BASHO Technologies

# COLD CALLING IS NOT DEAD

The debate on whether email is more effective than the phone rages on. On one side, pundits claim email gives you scale and speed you can't achieve with the phone.

But the managers at salesforce.com all insist the phone is best. And the reasons are simple. First, an answered phone call quickly puts you onto the path of qualification so you waste less time on a prospect that goes nowhere. Second, emails are easy to ignore, and sometimes never even seen due to filters.

And while the younger generations starting out in sales are more apt to use digital communications, the buyers they are targeting are probably a bit more traditional and respond faster to the phone.

## GETTING SOMEONE TO ANSWER THE PHONE

MAKING CALLS CAN BE TOUGH. HOWEVER, THERE ARE A FEW THINGS YOU CAN DO TO INCREASE YOUR CHANCES FOR SUCCESS:

- Call at different times of day
- Call in 2 hour blocks
- Print up a list of people you want to call
- Turn off your email and web browsers
- Leave voicemails sparingly so you can call back on your time



# SMARTER TOOLS = BETTER PRODUCTIVITY

The key to staying productive is leveraging the right suite of tools. For salesforce.com teams, that means using Salesforce tools such as Sales Cloud for CRM, Data.com for leads, and Chatter to collaborate on deals and across teams. The team also leverages marketing tools like Work.com to help increase sales motivation and Partner Management tools to help manage channel partners.

Free tools are great, too. Any sales team worth its salt does plenty of research before calling a prospect. Take full advantage of Google News Alerts, and check in with LinkedIn and Facebook for the insights the social world can give you. At the very least, these sources can put a face to the contact information you already have.



## HOW SALESFORCE USES SALESFORCE:

**SALES CLOUD**  
The #1 sales app in the world

**DATA.COM**  
Complete contacts and D&B company info that leads to 25% sales growth

**WORK.COM**  
Salesforce's set of performance tools to create incentives and motivate

**PARTNER MANAGEMENT**  
Tools to help manage channel partners

# MEASURE THEN MEASURE AGAIN

Think about anything you ever cared about getting better at: running, losing weight, or how much you make. Those are all measurable. It's no different when it comes to prospecting. Only with knowledge can you adjust and improve.

Here are some key things to consider measuring:

- How many calls you make?
- What time of day works best?
- How many quality discussions do you have (not with gatekeepers)?
- How many referrals do you get?
- How many meetings do you set up?



HERE'S A SIMPLE FORMULA THAT CAN ALSO HELP TRACK YOUR PROGRESS AND EFFECTIVENESS MONTH OVER MONTH:

$$\frac{\text{MEETINGS BOOKED} + \text{REFERRALS}}{\text{\# OF CALLS MADE IN A TIME PERIOD}}$$

Once you start tracking, the key isn't the number itself but focusing on how you can make the number better

# 3 THINGS TO REMEMBER

Prospecting is hard, but don't make it harder than it has to be. Keep things in perspective with these 3 points:

## KEEP MOVING

Leads are perishable. Take fast action on new ones and keep your foot on the pedal.

## DON'T TAKE IT PERSONALLY WHEN THEY SAY NO OR HANG UP

It's a numbers game; you have to keep plugging.

## USE MARKETING TO NURTURE YOUR COLD LEADS

Go back to check on them from time to time.



## FIND OUT MORE

To see how Salesforce can help you take the lead and manage your sales process better for better results, watch our Sales Cloud demo video now: [www.salesforce.com/in/sales-cloud/overview](http://www.salesforce.com/in/sales-cloud/overview)