FROM CRM
ZERO TO HERO

10 UNIQUE CRM STRATEGIES TO BOOST YOUR SALES IN 2020

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FOREWORD

Setting up a CRM is often like moving into a new house. We evaluate multiple options, think that we have prepared for the change, and when moving day finally comes, **all hell breaks loose!**

Once the dust settles, sometimes taking months or even years, we revisit many of the key decisions we made.

Why did we put that sofa over there?

Do I even need half of the tools I bought for the garage?

Why did I setup my lead flows to be that complex?

The fact that you have downloaded this guide is the **first** step in your optimization journey. The **second** is to learn from some helpful advice. The **third** is to begin implementing it.

The challenge with these types of guides is that they suffer several inhibiting problems. The people in the trenches and building the sales machines are normally too busy or too tired to write anything about them.

Standard eBooks and guides are normally full of product placement references which just **KILLS** the reading experience. The tips can be dated, or even worse, generic - the stuff we have all heard before.

That's why I've decided to scrap all of that and put my heart and soul into creating some **NEW** content designed to help you get the most out of your CRM in 2020!

If you have feedback, new ideas, or suggestions based on what you've read, please send them to my email at dailius.wilson@getaccept.com.

The best would be that you enjoy this publication so much that you forward it on to your peers!

Dailius Wilson
VP Sales & Growth at GetAcceot

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LEAD SCORING

TIP NUMBER ONE

In the past, we dealt with leads based on chronological order i.e., **When was this received and how long has it been since I responded?**

CRM strategy has now evolved where businesses of all sizes have been able to benefit from another key factor – lead routing.

Lead routing is when leads are transferred to individuals based on certain enrollment criteria like company size, industry, and geographical location.

Think of the old telephone switchboards of twenty years ago; **just for leads!**

The problem is even if leads find their way to the right person and at the right time - **there is still the question of prioritization:**

Which leads should be responded to first?

Which leads should I place the most effort into?

And so the lead score was born!

Modern sales leaders are using lead scoring to make sure their teams are **constantly prioritizing their top accounts** both for inbound and outbound sales activities.

The problem used to be that lead scoring was restricted to large companies who could afford software, complex excel models, or internal development terms to setup the way in which they attributed a rating to specified leads.

These days, most popular CRMs have launched their own versions of a lead scoring system. Even without them you can use a tool like Zapier to build your own DYI solution.

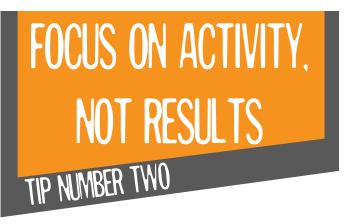GetAccept

LEAD SCORING

TIP NUMBER ONE

A basic lead scoring system normally generates a rating out of 100 for each contact record in your CRM and places this in a custom field so you can retrieve it later.

Here is a basic example:

TYPE OF ENQUIRY

Request call form:
30 points

Online chat held:
15 points

Watched demo video:
10 points

COMPANY SIZE

Between 50-500:
30 points

Greater than 10,000:
10 points

Between 500-200:
20 points

Less than 50:
5 points

Between 2,000-10,000:
15 points

LOCATION

In USA:
10 points

Everywhere else:
0 points

ROLE IN COMPANY

C-level:
30 points

Manager:
10 points

VP level:
20 points

All else:
0 points

Based on the above criteria, if a CEO from a company with 50-500 people in the USA requested a call - **they would have a score of 30 + 10 + 30 + 30 or a perfect score of 100.**

As you become more advanced - you can also add negative scores which increases the sensitivity of the score to factors that are less desirable. One good example of this is when you only have one team that is awake in one time zone. Any countries in time zones outside your business hours should carry a negative score.

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FOCUS ON ACTIVITY, NOT RESULTS

TIP NUMBER TWO

After we set up a CRM, we typically only care about the metrics we need to report at a sales standup; how many exploration calls have been booked, how many deals are in the pipeline, which deals will close this month, and what is the total value of all deals closed?

Taking your CRM mastery to the next level involves understanding that the metrics mentioned above are outputs; they result only if certain activities are completed - what I'll herein refer to as inputs.

In sales, inputs are simple; meetings held, calls made, emails sent, social selling activities completed, like commenting on the LinkedIn post of a prospect.

Sales leaders will take action when things become too lagging. This, however, is too late as they are analyzing outputs which occur after the fact.

What if you could join the world's top sales managers by predicting these results BEFORE they happen?

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FOCUS ON ACTIVITY, NOT RESULTS

TIP NUMBER TWO

The answer is in setting measurable efficiency goals around sales activity inputs. Creating a centralized dashboard and aligning a target to each input should allow to boost results and forecast problems before they occur. Let's see the example to the right:

Activity Input	Efficiency Goal
Phone Calls Made	Phone Calls Per Day Per Rep
Emails Sent	Emails Sent Per Day Per Rep
Inbound Leads Responded To	Time To Response From First Enquiry
Meetings Held	Meetings Held Per Rep Per Week

Once you start monitoring the average levels for your company, you will be able to see correlations in activity and results.

For example:

An outbound sales team is short of their sales target by one deal per week. Looking at the data - only 140 calls are being made across all the reps each week. On average it takes 70 calls to secure 1 qualified meeting and of those only 20% become customers **What should they do?**

Focusing on increasing the amount of calls versus making statements *like "we need to increase the amount of deals" s*hould allow you **to boost results faster.**

If you need 70 calls to be made to secure 1 qualified meeting and only 20% of your meetings close - then you know that 350 calls will need to be made across your team to secure one deal. That is a deficit of 210 calls per week; so either **more reps need to be hired or the efficiency per rep needs to increase** by an implemented fix goal for calls per day.

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SET UP EXIT CRITERIA

TIP NUMBER THREE

Under the default settings in most CRMs, reps can simply move a deal from one stage to the other, or in many cases, forget to move it at all!

Sales leaders around the world are encouraging best practice within their deal process by bringing in exit criteria to their deal process.

Let's dive a little deeper....

Amongst the many problems in the sales cycle, a great area of focus is in resolving sales reps from moving deals too quickly into the proposal/quotation phase without properly determining the scope of the engagement.

What if this could be avoided through making a series of **mandatory steps that need to be completed** before a deal can be moved to the proposal stage?

In our company, for an account to enter the proposal stage the following exit criteria needs to be met:

✓ **Person signing the contract has attended the meeting**

✓ **The prospect can explain the differences between us and the competition in their own words**

✓ **Proposal planning meeting with direct managed held**

Although the proposal stage is a great example, exit criteria can be applied to all areas of the deal cycle.

For sales development teams, this is especially true for moving deals from initial enquiry to qualified first meeting.

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EXPERIMENT WITH DEAL EVENT AUTOMATIONS

TIP NUMBER FOUR

In 2020, so many of the tasks we spent hours doing in the past are now made instantaneous through technology.

For instance, remember the days of manually sending 100s of emails to people via an Excel spreadsheet or manually dialing hundreds of numbers on a desk telephone?

What we underestimate is the power of automating the experience of our buyers based on critical moments in the customer journey.

Using CRM workflows or middleware, like Zapier, we can create personalized moments that make a deal more likely to close.

Below I have compiled a few examples of automations that I've seen move the needle in sales companies I've worked with:

THANK YOU NOTES

When a client closes, often we forget to thank them for their business, especially if there were multiple team members involved throughout the deal. Write a task that automatically sends an email thanking the customer for their decision within 24 hours of a deal being moved to the "Closed Won" stage.

PHSYICAL MAIL

When a prospect is qualified and a senior decision maker is involved, you can arrange for them to have a physical gift or "swag package" sent to their office to help foster the relationship. Here at GetAccept, when a deal is moved to proposal, an email is automatically triggered to our office manager with the customer name, title, and address from the CRM. This allows us to order and mail a gift within half a day of occurring.

INTERNAL SUPPORT

Workflows can also be used to alert team members of critical deals which they could support from a sales enablement perspective. When a deal meets certain conditions, why not notify the future customer success representative so they can give their opinion on the case before it closes. Perhaps they can add value in a unique way which helps the deal close faster.

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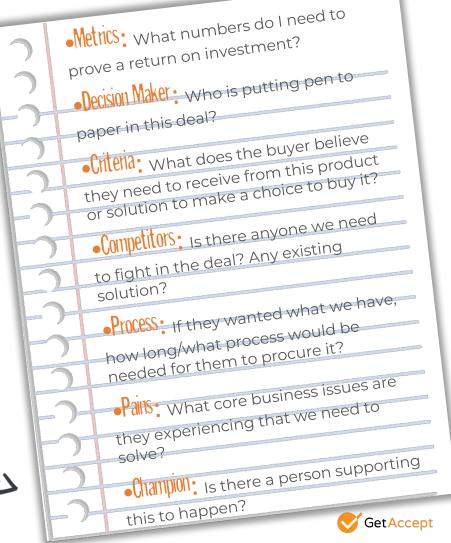As sales people, we are so hard to manage because there are so many unique approaches to the profession.

This extends all the way to some of the more mandatory tasks, like note taking.

One of the biggest frustrations for managers seeking to gain a better understanding of whether or not deals are progressing is through analyzing the notes left by sales people. However, without any uniform process, there are always reps who lag behind whilst others stand out.

Implement a framework for your key meetings and the notes you expect. Modern CRMs actually allow you to store templates for the notes sections to save reps from manually entering the same scaffold every time.

If your CRM doesn't have this feature, use a tool like Paste 2 for Mac or Comfort Clipboard on PC to save your reps time by creating templates for them to copy and paste into your CRM platform.

To the right on the note page is the framework I like to use for a client and is maintained throughout the deal cycle:

- **Metrics:** What numbers do I need to prove a return on investment?

- **Decision Maker:** Who is putting pen to paper in this deal?

- **Criteria:** What does the buyer believe they need to receive from this product or solution to make a choice to buy it?

- **Competitors:** Is there anyone we need to fight in the deal? Any existing solution?

- **Process:** If they wanted what we have, how long/what process would be needed for them to procure it?

- **Pains:** What core business issues are they experiencing that we need to solve?

- **Champion:** Is there a person supporting this to happen?

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ADD MANUAL TASKS IN YOUR SEQUENCES

TIP NUMBER SIX

Email automation is a staple of any modern sales team, but is this "automation" factor the cause for sellers to become lazy when it comes to trying to generate interest.

When I speak to sales leaders at Fortune 500 companies, they often tell me that their sequences have up to 40 steps, with only the first two emails being completely personalized.

What many people don't realize is that we can also insert manual steps into the sequence flow to boost personalization on many popular CRM and sales engagement platforms.

While not completely automated, manual tasks can bring structure to more complex sales motions where research and effort can pay dividends.

A SELECTION OF TASKS THAT CAN BRING LIFE TO GENERIC EMAIL SEQUENCES INCLUDE:

- Going on the prospect's Linkedin page and commenting on their last post

- Finding a post from someone at their company or recommendations section on Linkedin, leaving a comment, and tagging them in it with a statement like "*What are your thoughts?* "

- Screenshotting important sections of their website like the about us page, customer testimonials, or case studies, and including these in email attempts

- Finding press about the company in the last 7 days, screenshotting it, and adding it to an email attempt

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SEND A PRE-MEETING AGENDA

TIP NUMBER SEVEN

After surveying hundreds of prospects, who have bought technology products over the last three years, I realized they all shared a similar frustration.

The sales rep often turns up underprepared or, even better, with absolutely nothing at all.

You'd be surprised as to how many people jump on a call or take a meeting without even researching the person or company they are talking to.
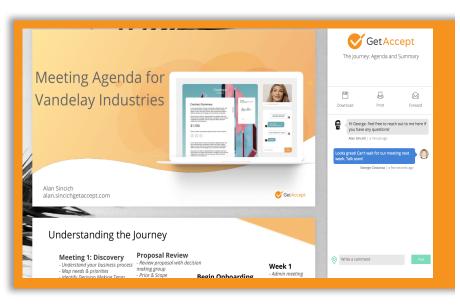
EVERY BIT OF EFFORT MAKES A DIFFERENCE !

One of the easiest best practices to implement is to make sure each rep sends a pre-meeting agenda before the meeting.

Typically email is used to do this, but often it can be lost in the inbox or the impression seems too casual.

Using tools like GetAccept, sales reps can send pre-meeting agendas with interactive video, live chat, and slides to set the right tone before important meetings.

In addition, tracking can reveal if your prospects actually engaged with the materials, allowing you to get to the point faster from the outset of the meeting.

Fillable questions and answers can also be inserted to gain critical information you would otherwise only receive before the meeting.

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SEND A POST_ MEETING SUMMARY

TIP NUMBER EIGHT

After a meeting is held, a common frustration for most prospects feel is not hearing back for days after a critical conversation.

Given that there are also a number of stakeholders involved in a deal, key participants often require materials to show other people in order to create communal buy-in on a new purchase.

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Have reps follow this process to boost engagement following a meeting and to increase conversion from meeting to contract:

1. Collect and save meeting notes using a standardized template like the one mentioned earlier in this guide

2. Use a tool like **GetAccept** to combine these meeting notes with case studies, testimonials, and other valuable information

3. Add a video thanking the participants and explaining next steps

4. Send this directly to the prospects without leaving the CRM

Ideally these experiences should be sent within one hour of the meeting taking place.

Post Meeting Summary

Vandelay Industries

Alan Sincich
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Post Meeting Summary

View Document

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CREATE & SHARE WIN STORIES IMMEDITATELY

TIP NUMBER NINE

We fight for months, sometimes years, to secure a sale and then suddenly, once the contract is signed and the payment is received, the journey is all over and it's on to the next deal!

Celebrating the success is important, but using the insights to boost overall performance of other team members is critical.
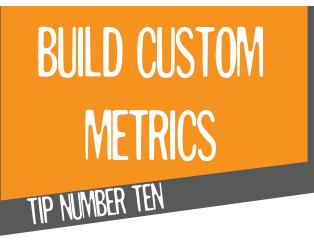
An easy way to make this fun and informative is to have reps fill in this template and leave it on the deal or opportunity record in the CRM:

- **Why did the customer choose us?**
- **What was the industry and the use case?**
- **What was the critical moment in the deal?**
- **Did you feel any hesitation as to why the deal wouldn't happen? How did you overcome it?**
- **Anything you'd like to share with the team?**
- **Link to video summary**

As you can see at the bottom, I encourage my team to create a 30-60 second video to share amongst the entire group and leave it on the CRM record to give a more detailed and verbal account of what happened.

You will find that this process will provide a good library of sales enablement information for the team and will create more substantive points of analysis for one on one pipeline review meetings.

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BUILD CUSTOM METRICS

TIP NUMBER TEN

Most CRMs provide a standard dashboard with standard metrics, but no company ever got to a $1 billion valuation by doing the "standard" things that everyone else does.

Top sales leaders in the industry keep a tight grip on the following metrics and create their own custom dashboards in the CRM to monitor:

SALES CYCLE TIME

How long does it take on average from enquiry to deal closed? How can I reduce this as much as possible?

ACV OF DEALS BY SOURCE

Are the deals greater in size from certain channels? How can we double down on these channels?

AVERAGE ANNUAL CONTRACT VALUE (ACV)

How much is the average deal my company signs? How can I increase this year over year?

AVERAGE TOUCHPOINTS BEFORE FIRST MEETING IS HELD

How many touchpoints on average are needed to bring a customer to a meeting? Could it be that if meetings aren't being booked, it's most likely that the reps are not communicating enough?

DEALS CREATED BY SOURCE

Where do the majority of my deals come from?

Adding these metrics to the more standard measurements, like meetings held, deals created, and deals closed will give your CRM strategy more sophistication.

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WHAT WOULD YOU LIKE TO LEARN NEXT?

MESSAGE ME AT :

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