PROSPERWORKS

4 Ways Sales Ops can use CRM to Support Growth

What is Sales Operations?

Sales operations (aka sales ops or sales support) is a set of business activities and processes that help a sales organization run effectively, efficiently and in support of business strategies and objectives.

For any sales organization, sales ops is the glue that holds everything together. This includes prospecting, sales development, account executives, leadership and finance. In particular, sales operations teams help sales leaders with data management by picking and choosing which data to examine. They also make sure data is clean, accurate, and complete.

This intelligent analysis of raw data by sales ops teams is invaluable for sales leaders. Answers to questions like, "Which customers are most receptive to certain products?" or "What are the best practices of top-selling reps in the organization?" help sales leaders base decisions on facts, not intuition.

Because sales ops is responsible for ensuring the efficiency of these teams, they are also responsible for the technology stack used by everyone in the sales organization. Among this set of tools, CRM takes precedence, as it helps sales organizations collect massive amounts of data, while working to deliver value to the sales team in a scalable, flexible fashion.

Check out the 4 ways sales ops teams use CRM to support the growth of their business:

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1

Building the sales process

Creating a standardized process is important for every sales team. Not only does it increase team effectiveness and highlights areas of improvement with valuable data, it also improves your bottom line (B2B companies using a formal sales process experienced 18% more revenue growth than companies that didn't).

Any master of sales ops can help define and automate the sales process with Customer Relationship Management (CRM) software. In turn, reps will always know the next step to take with each prospect.

So, what should you try to achieve for your sales process with CRM?

Predictable, measureable results

Without the ability to predict sales activities, it is impossible to measure the contribution the sales team (both individual reps, and as a whole) is making to the organization.

In order to establish predictability, sales ops teams should create systems to collect data about prospects and establish consistent activities. In turn, everyday efficiency can be more easily measured.

Recurring trends

As you begin to collect data, you'll also start to notice the patterns that appear. Through sales ops, you can identify various stages of a sale process to increase data quality, while removing emotion and subjectivity from the results. In turn, factors such as the buyer's stage in the funnel, or industry/role/seniority benefit from being classified.

Optimization

Optimization is a crucial part of sales operations. This becomes much easier once a predictable and easy-to-identify sales process has been created. With an optimized sales process, questions like, "How do we really know that the buyer is ready to buy after their first demo?" or "How often do opportunities marked as 'Verbal Commit' actually close?" gradually become easier to answer.

Lead generation and management

Many sales teams complain that leads from marketing are often useless. Meanwhile, marketers insist they've fulfilled their lead-generation objectives. The truth lies somewhere in the middle. Sales operations can make lead generation, lead capturing, and following up on leads a seamless, cost-effective, and collaborative process that better aligns sales and marketing workflows.

Adoption

Building a sales process from the ground up is difficult on its own - unfortunately, the hard part isn't quite over.

Those in sales ops often have to chase down sales reps to comply with using the technology that will ensure the process runs smoothly. And they don't just do it for fun—they do it to ensure a high level of data integrity.

There's a popular saying in the sales operations world—if it isn't in the CRM, it never happened. The data stored in customer relationship management software is the foundation of modern sales analytics—and will be deemed worthless if it's not organized in one system. Combining data from multiple sources into one CRM gives your team a complete picture of what's happening with both individual customers and larger trends within your business.

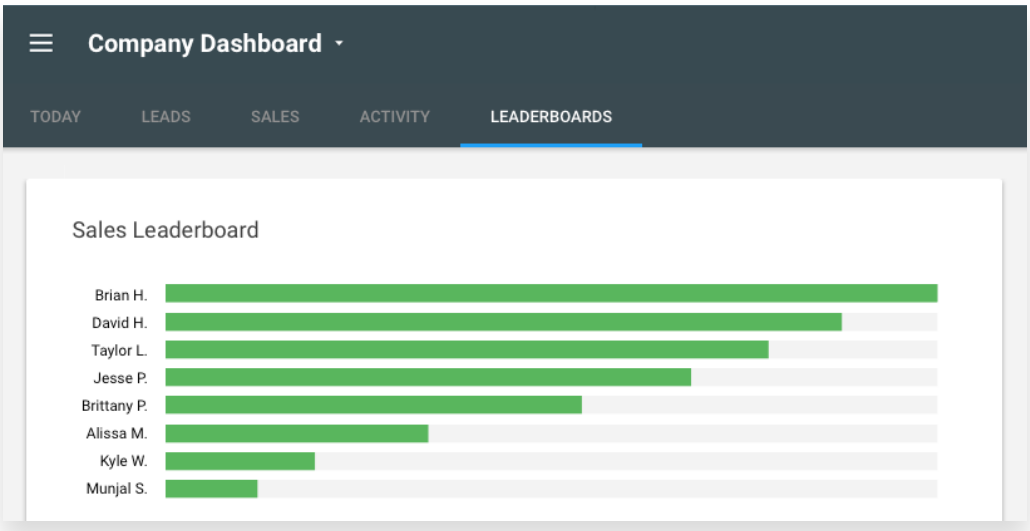
2 CRM customizations

Anyone in sales ops knows the more they customize their CRM to their team's needs, the greater the team will benefit. Here are a few ways to maximize potential of your CRM:

Dashboards

Dashboards allow sales managers and executives to get a high-level overview of key metrics and team activity. If your CRM's dashboards are customized to showcase the data you care most about (i.e. daily SDR activity, MRR achieved by AEs, etc.), valuable time can be saved every day.

It often falls on sales operations to determine which data sales leaders will benefit most from. In turn, not having to search for this critical information allows sales managers to focus on coaching their teams and helping sales reps close more deals.

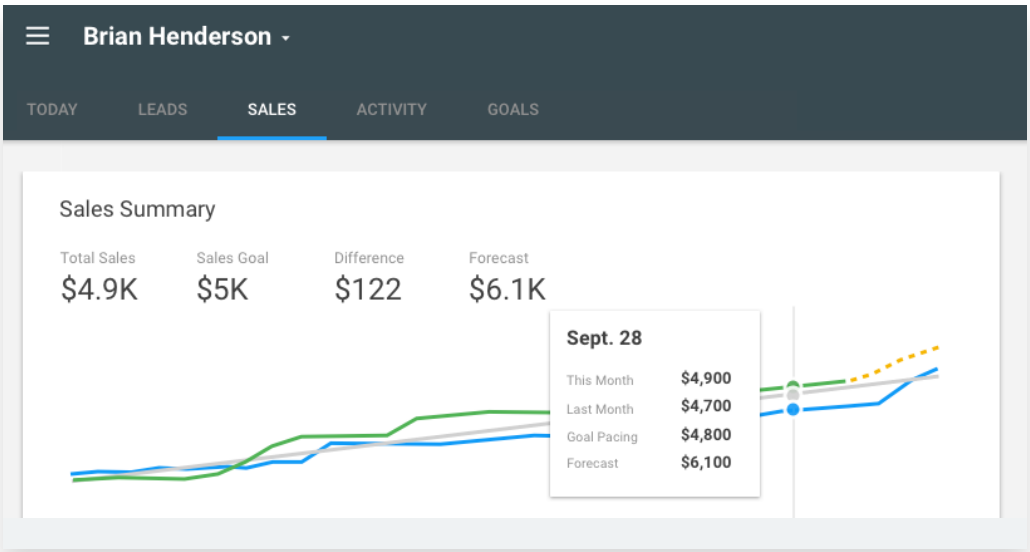


Creating custom reports

As mentioned above, sales ops teams have specific insight on which data is most important to their sales organization. Sales leaders and reps don't have much use for data that's raw or inaccurate. Creating detailed, custom reports unearths the information

needed by management to drive revenue growth, identify new revenue opportunities or areas for team improvement, and respond to market challenges.

By adding the right filters and making these reports accessible within a sales team's customer relationship management system at the touch of a button, sales ops prevents this information from getting lost in the daily rush of activity.

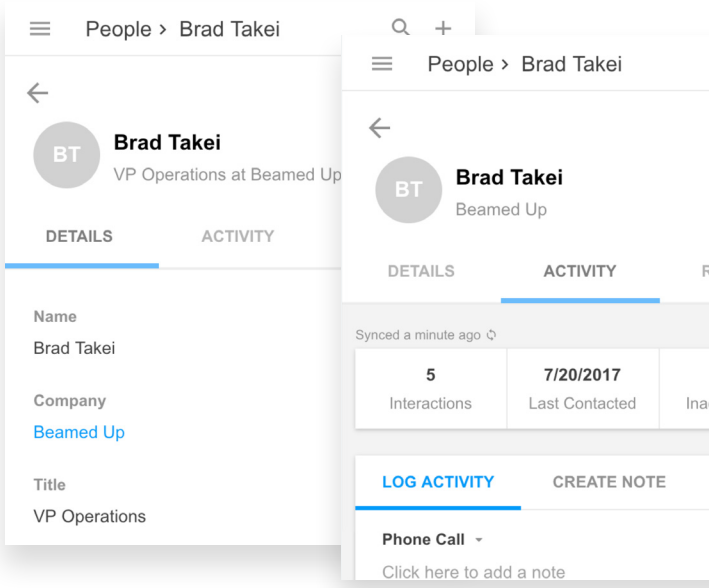


3 Integrations for your CRM

As a sales ops professional, you'll probably find yourself evaluating and activating CRM integrations. Because you have have technical skills that others in the sales organization don't have, you can work with marketing and IT to integrate sales tools with other tools (i.e. prospecting or marketing automation software), as well as make sure it complies with IT standards for security.

If you're just starting out, consider a customer relationship management solution that integrates with the tools your team is already using. Say your entire sales team is well-versed in G Suite and has been using Google Sheets to keep track of data. It would make sense to find a customer relationship management system that easily integrates with these tools and seamlessly transfers information from them to the CRM.

At the same time, a solution with an inbox extension will help them save time, and allow them to work where they spend the majority of their day, their email.

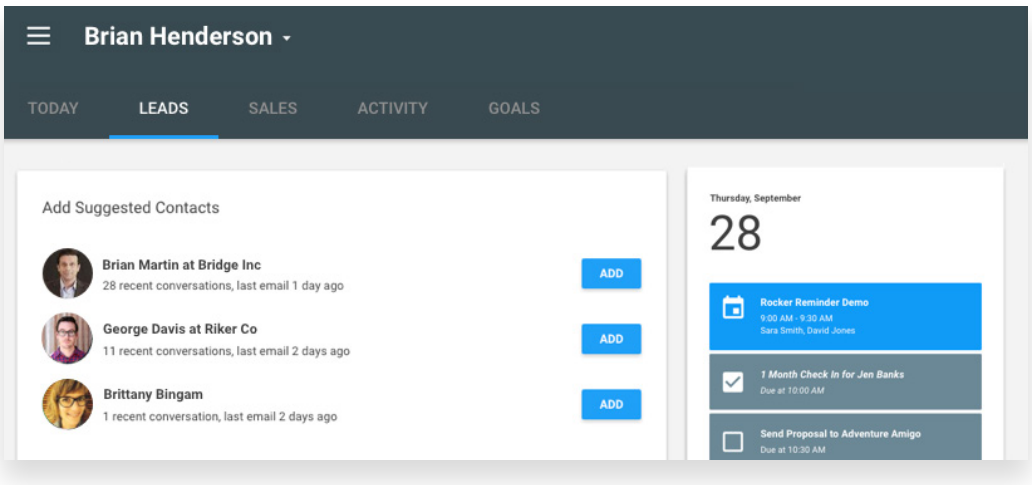


4 Communicating to the rest of the organization

For many businesses, stakeholders lean on the sales ops teams to prepare summary sales, pipeline and revenue reports.

If your system's CRM customizations make it easy to pull data, you can also provide easily-digestible overviews of what's happening in sales. This helps company executives and non-sales departments understand customer behavior on a deeper level. In turn, these actionable insights improve their ability to support the sales department and company growth.

Flexible CRM platforms can integrate with virtually every business software tool that sales teams use. Sales ops can evaluate which CRM integrations their team will need, research the technical requirements, and take lead on activating them. Selecting the right integrations has a multiplier effect on sales rep efficiency.



At the end of the day, your CRM platform does more than keep sales operations teams organized. Based on the conclusions sales ops can draw from CRM data, your business will be able to take action, stay ahead of the competition, and keep customer satisfaction levels high.

ProsperWorks: A CRM that teams actually love to use

We talk to lots of teams who are typically in one of two camps. Either you have a CRM that you thought was going to fit your needs and be adopted and loved by employees, but it's not working out. Or, you've decided to hold off on implementing a CRM because you're not prepared for a complicated setup and disruption to your workflow and you're skeptical that it will actually get used at your business. In either case, we recommend you try ProsperWorks—we're pretty sure you'll love it.

ProsperWorks was built with three basic principles in mind: Keep it simple. Show what matters. Make it actionable. We're doing that by seamlessly integrating with G Suite, eliminating painful data entry, and automating time-consuming tasks. We help teams improve how they manage their team and workflows so they can make better business decisions and accelerate sales.

To find out how ProsperWorks can boost your business's profits, sanity, and end customer experience, sign up for a free trial today at **www.prosperworks.com**.