

THE SALES  
HANDBOOK  
**THE SALES  
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HANDBOOK

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# A fresh look at sales fundamentals for high-growth businesses.

Intercom builds a suite of messaging-first products that all modern internet businesses can use to accelerate growth across the customer lifecycle, from acquisition to engagement and support.

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We also regularly share our thoughts on growth, marketing, sales, startups and the business of software.

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# FOREWORD

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Jill Konrath, International Speaker, Sales Strategist and  
Bestselling Author of *[SNAP Selling](#)* and *[More Sales, Less Time](#)*

The first rule of selling is always be crystal clear on the value you're adding.

When I started consulting, I thought my value was in all the tactical things I could help sales leaders do. I could help their sales teams focus on the right opportunities, rapidly create interest, get buy-in from prospects – and, of course, close deals quicker. Sounds pretty darn compelling, doesn't it?

So one day, I decided to get confirmation directly from my client, a growing division of a Fortune 500 firm. I invited the VP of Sales to lunch, and when I finally got up the gumption, I asked him, "John, can you tell me what I'm doing that makes you keep hiring me?"

He responded, "That's easy. You make me see things differently."

I'll admit, I took a long time to fully appreciate what he said. But here's the thing: Seeing things differently is exactly what makes great salespeople so good at their jobs. There's even data to support it. According to Forrester Research, you have a [74% chance of closing a deal](#) if you're the first vendor to create a viable vision for the future.

That's what I was really doing, and that's what this book will do for you – help you see things differently. Featuring contributions from today's leading founders, investors and operators, this book gives you an inside look at how they've approached the art and science of sales. Within its pages, you'll find tried and true advice for growing your team, pipeline and business. Whether you're fresh to sales or an industry veteran, I guarantee you'll learn something new.

Good luck out there, and remember, it's worth seeing things differently.



# EDITORS' NOTE

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Sales is the lifeblood of every business. Without it, you have no way of acquiring customers, getting to breakout revenue, or creating and accelerating meaningful growth. But it's also one of the hardest functions to get right, especially today when buyers have hundreds, if not thousands, of choices. The need to establish a strong foundation in sales – one that'll help ensure your success in this new era of selling – is what encouraged us to write this book.

From the very beginning, we realized the book could only play out one way: by featuring real advice from real experts. Throughout the book, you'll hear from many voices, including founders and investors, sales trainers, and VPs and Directors of Sales. They provide new perspectives on questions like, how do I create an effective compensation plan? When should I move upmarket? How can I use automation to make my sales team more productive?

What follows are answers to those questions and actionable advice on many more. Along with excerpts of [our podcast](#), we interviewed our sales team and our colleagues in the industry for their insights. We've also included samples from some of the best writing on sales that resonate with our own philosophies at

Intercom. Front-to-back, you'll hear from over 30 of today's top sales leaders.

The book is designed to be read in any order. Each chapter is a self-contained exploration of one of four themes we feel are critical to master at every stage of your business: developing a sales strategy, growing your sales team, modern sales techniques and real-time sales.

We'd like for you to think about this book as a jumping off point. Its ideas, principles and frameworks are intended to inspire, not prescribe, how you'll practice sales to grow your business. In each section, you'll find links to read more from our contributors. We encourage you to click on them and explore what else is out there.

Finally, we'd like to thank all of our contributors. We are deeply indebted to them for their willingness to share their hard-earned wisdom and the valuable lessons they've learned.

We hope you enjoy the book.

Courtney Chuang & Geoffrey Keating, Intercom

# DEVELOPING A SALES

# DEV- STRATEGY ELOPING A SALES STRATEGY

Crafting a sales strategy is one of the core activities every business will have to undertake. You can delay it until you've acquired your first 100 or 1,000 customers, but at some point you'll need to find sustainable traction in the market.

A well defined sales strategy is your path to meaningful growth. It's how you'll know who your target customers are and how you'll sell to them. Get it right and watch your company's growth trajectory go up and to the right. Go without one and risk seeing your business flame out.

The challenge for you is deciding which sales motions will actually drive your strategy forward and leaning into just

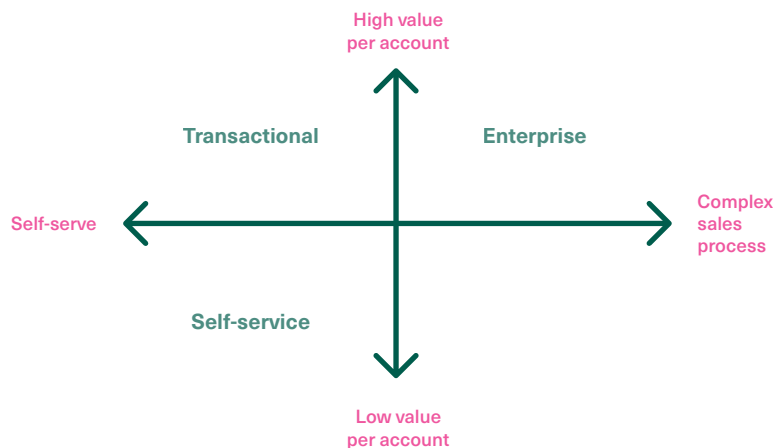
those few. It's far too easy to say your initial sales team will be both SMB and enterprise, inbound and outbound, hunters and farmers. The reality is that without focus, doing any of those effectively is nearly impossible. The key is to experiment and iterate with discipline, so you can zero in on the sales strategy that's right for your business.

Here, you'll learn from top practitioners in the field about their winning sales strategies and the lessons they've learned scaling sales. Taken together, their advice is a roadmap to identifying and navigating the crucial inputs to long term sales success.

# What it takes to attract your target customer

Des Traynor,  
Co-Founder, Intercom

— Regardless of whether you're selling a SaaS service or a physical good, you need to understand what it takes to attract your target customers and decide how much revenue you want to earn from them. That gives you the ability to plot how you'll reach those customers, which gives you three options:



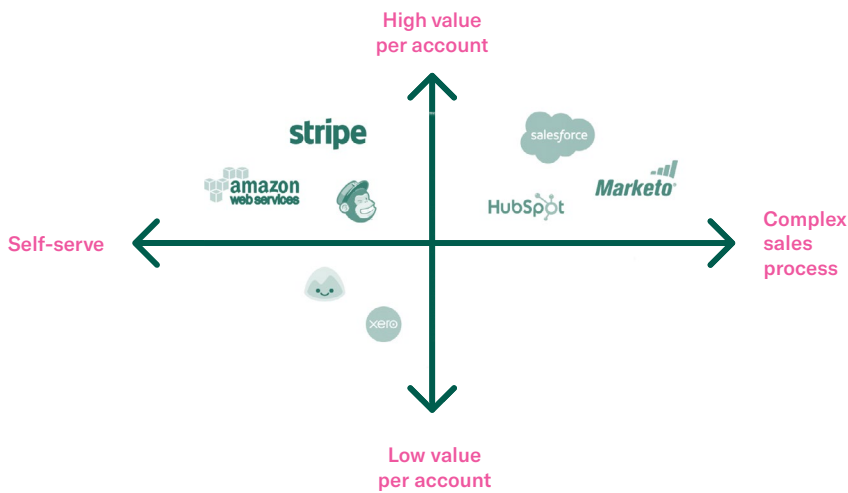
These axes were created by [Joel York](#) to define the three key sales models for SaaS businesses and are a great way to help you understand how to move forward. (The bottom-right quadrant, a complex sales process with low value customers, isn't a viable business, so it's not even worth considering.)



Many startups, when using this model to define themselves, end up in the bottom-left quadrant because it's the easiest one to scale in. The problem is that being in the lower left means you usually end up with a high amount of low value customers. This limits how you can acquire customers. Spending \$300 to acquire customers for a \$99 product isn't economical.

So depending on what industry you're in, picking the wrong quadrant could

## Part I



leave you dead before you even start building anything at all.

Here are some examples:

- Some industries are notoriously hard to reach, e.g. content marketing isn't as effective for dentists as it is for developers. This means you might need to pay to acquire customers.
- Some industries deal in annual contracts, NDAs and SLAs. This means you need to invest in a sales process.
- Some industries are used to PowerPoint sales presentations, handheld onboarding and onsite training. This means you need a high contract value to profit on a customer.

Evaluating if you're able to offer a self-serve experience or a complex sales process and then determining if there's a high or low value for each user helps you decide how you should approach the customer.

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Excerpt from [Intercom on Starting Up](#).

## When you need sales in a self-serve world

John Barrows,  
Sales Trainer

—— If you're selling something that has a super low Average Contract Value (ACV), say, \$1,000 for the year, it's hard to justify having sales in that equation whatsoever. But, if you're in somewhat of a complex sale that involves a sales cycle longer than 20–30 days, and at least two or three calls with multiple people, sales is a critical part of that to make sure it goes right.

You can only automate and educate people so much before they want to talk to somebody. Maybe \$5,000–\$10,000 is when people get more uncomfortable putting their credit card online and buying without talking to people. But that threshold exists.



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John Barrows, as heard on the [Inside Intercom](#) podcast.



# Focus breeds excellence in sales

LB Harvey,  
VP of Sales, Intercom

— One of my guiding principles as a sales leader is “focus breeds excellence.” Sales reps, especially new ones, struggle to be fabulous at multiple sales motions. That means when you’re formulating your sales strategy, you need to be explicit about creating the right, differentiated roles on your sales team and ensuring you’re incentivizing and prioritizing the right motions within those roles.

Let’s take inbound sales and outbound sales, for example. Inbound and outbound require vastly different skills and workflows. The managers on an inbound team need to be obsessed with analyzing top-of-the-funnel trends – the marketing channels bringing in high quality leads – and increasing the conversion rate from lead to opportunity with tactics like live chat. Managers on an outbound team, on the other hand, need to be able to get sales reps gunning to go out and evangelize the product’s amazing benefits for customers. The point is they’re different teams, different reps, different motions.



## Do you know who your ideal customer is?

Tomasz Tunguz,  
Partner, Redpoint Ventures

— The Ideal Customer Profile (ICP). The perfect customer. Can you describe it for your startup? The more precisely you can describe it, the better. That will simplify disqualification. But articulating the ICP well isn't enough.

Vague ICPs are problematic. The company will focus on too broad a customer base, waste time and effort with unqualified prospects and blunt their sales pitch with irrelevant value propositions.

Clear ICPs can also be problematic. A clear but useless ICP might be: a disenchanted thirty-something mechanic who likes to play German board games, read Nietzsche and watch MMA. I can clearly articulate my ICP to myself and others. The target market is clear (and niche!)

But how would I identify this person if I'm looking to sell to him? Where would I begin



generating leads? Mechanics meetups? Board game conventions? Nihilist forums?

A good ICP must serve three purposes. First, the ICP should enable me to identify a good prospect quickly. Second, I should be able to simply convey the ICP to someone else in such a way that they can find other ICPs. Third, the ICP should be defined so systems can be built to identify them.

A better ICP is: VPs of marketing in GDPR-affected regions; or heads of sales with teams larger than 50 people in technology; or CEOs of profitable pool supply companies.

These ICPs are much easier to identify using lead generation tools. They can be communicated to teammates simply and computer systems can be tooled or trained to identify them at scale. To grow, startups must scale and distribute ICP identification from one to ten to hundreds of people. A narrow, clear and identifiable ICP is a crucial ingredient in that growth.

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Excerpt from "[An Often Forgotten Characteristic About Your Startup's Ideal Customer Profile.](#)"





# Why salespeople need to think like consultants

Mark Roberge,  
Senior Lecturer, Harvard Business  
School, and former CRO, Hubspot

— When folks ask, “What’s changing in sales; how is it different?,” the common theme is that it’s going more and more inside. Twenty years ago, you had to actually talk to a salesperson just to do your buying process. They had information that you needed, and the best reps were very skilled at withholding that information in exchange for the information they wanted from you – who’s the decision maker? How much budget do you have? What are your needs?

But today, I can be in my slippers on Saturday night, after I put the kids to bed, and I can find the top five vendors in a space. I can find out what they do, how they are different from one another, and how much they cost. I can try many of the products for free, and I can buy many of them right on the site. Why we need sales becomes a huge question, right?

*We need to do a better job, when we engage with someone, to engage with them in their context.*

Those of us in sales have to step up our game in order to add value to that whole ecosystem. We need to be there as consultants and advisers to our buyers. We need to do a better job, when we engage with someone, to engage with them in their context. We need to do a better job understanding their specific goals and the specific challenges they’re trying to solve, and translating the generic marketing on our website to their business. We need to tell the story from their perspective. That’s the skill the best reps now possess.

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Excerpt from “[Hubspot’s Mark Roberge Talks Inbound vs. Outbound Sales, Transparency and Big Data.](#)”

# It's never too early to invest in sales ops

LB Harvey,  
VP of Sales, Intercom

——— Setting up a sales operations team is absolutely paramount to your success as a sales leader. They're a strategic arm that puts your sales strategy into high gear. For all the talk about sales hacks and magic, sales operations is really what helps you nail the right motions for your team.

Let me put it this way: if your sales reps are race car drivers, your sales ops team is the pit crew. They're the ones ensuring your frontline sales team gets deals to the finish line with precision and consistency. And just like in auto racing, you can't have one without the other if you want to put your business into hyperdrive.

That's because sales ops is the collision point for so many crucial sales initiatives. If you want your sales reps to spend more time selling and less time doing administrative work, then you need sales systems to optimize away the inefficiencies. If you want your sales reps to be on the cutting edge of

the market, then you need sales enablement to train them on competitive positioning and to curate external sales trainers. If you want to own your pipeline and your forecast, then you need sales analytics to identify high potential prospects, flag accounts at risk for churn and set the right incentives to execute against those goals.

Sales ops is incredibly powerful for your business, and you can never invest in it early enough.

*For all the talk about sales hacks and magic, sales operations is really what helps you nail the right motions for your team.*

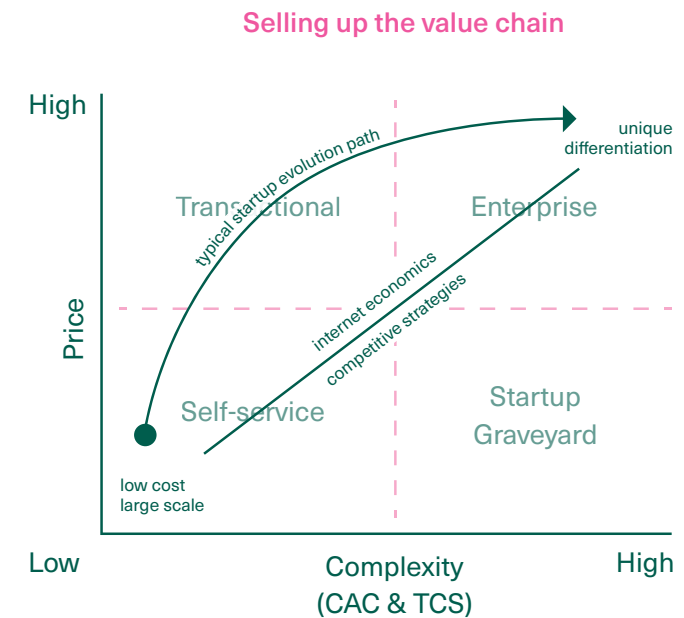
# From SaaS startup to mature SaaS business

Joel York,  
CMO, Accellion

— As a SaaS startup evolves into a mature SaaS business, growth aspirations naturally lead to the desire to expand market reach to new prospects and to expand product footprint with current customers. The SaaS startup that enters the market with a customer self-service SaaS sales model represents the origin of a natural evolutionary path.

The theory is straightforward. The nimble SaaS startup that has built a large self-service customer franchise for a super simple product starts pumping in new features, develops modular pricing schemes, adds a few sales reps and sets off on a quest to increase its average selling price from \$10 of monthly recurring revenue to \$100 MRR to \$1,000 MRR to \$10,000 MRR and beyond!

However, the straightforward tactics belie the tectonic strategic, operational and cultural shifts required for success. Underlying the



simplicity of the customer self-service model is a mass market, low cost competitive strategy. Meanwhile, the enterprise sales model assumes a highly differentiated product, usually characterized by cutting edge internet-enabled innovation.

Maintaining the simplicity of the customer self-service model as a successful SaaS startup introduces more complex products

and purchase processes in close proximity to the originally simple, self-service product and purchase process requires careful planning and execution. Should the products be separate offerings or modules of a single offering? Should transactional sales arise by skimming the cream of customer self-service prospects, or should entirely new lead generation vehicles be put in place? Are enterprise customers just transactional customers who are all grown up, or an entirely different species?

It is often said that moving upmarket is easier than moving downmarket. This is probably true, but it is NOT easy to move up without inadvertently abandoning the down.

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Excerpt from "[SaaS startup strategy | Three SaaS sales models.](#)"

# Experiment with your sales strategy – before you pivot

Elizabeth Cain,  
Partner, OpenView Venture Partners



— Sometimes a sales leader or founder or even CEO gets too excited by too many new ideas. Every new idea is a GREAT idea that he or she wants the entire company to chase. Moving too quickly, all in different directions, and pivoting regularly creates confusion – you hamper your own progress. The most common risk I see? Moving to enterprise. Companies close one or two enterprise customers and get big deal fever. They pivot their entire business strategy and point the outbound team at ONLY enterprise meetings.

A culture of experimentation needs to be established at the top and pushed down into an organization. It takes guts to test things, fail and go again. Leadership teams need to create room for this and encourage creativity without repercussions.

So how do you actually run a disciplined experiment? It starts with a hypothesis – what are you here to test? Then you need to identify the different factors, design a process, agree to a timeline and be crystal clear on the metrics you will track to determine if it worked. After you run the experiment, you need to be rigorous in your review. If it worked, the next step is to figure out how to cap out this option – how far can it scale?

## How to run a disciplined experiment.

Experimenting can be made simple using these four steps.

1. Generate hypothesis

2. Design experiment

3. Run experiment

4. Analyze result

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Excerpt from "[The 3 mistakes every company makes building the outbound sales model.](#)"





## Be wary of “happy ears” with upmarket customers

David Katz,  
Director of North America Sales,  
Intercom

— There’s a classic response people have when talking to larger companies – I call it “happy ears.” It’s incredibly easy to be overly optimistic when you see a sexy new logo walk in the door. The thing you forget is that at large organizations, there are lots of people there who are constantly evaluating technology and looking for ways to use those new tools to help them stand out or leverage a proposal to negotiate better terms with their current vendor. But out of all these evaluations, very few purchases are actually made.

As a sales leader, you have to be very dubious of this situation. The reality is that you should walk away from 99% of these early conversations with larger customers. If you can’t get the stakeholders on the other end to give you straightforward answers, agree

to a mutual evaluation plan or meet shared deadlines, then it's time to walk away. The absolute worst thing you can do is waste your time or theirs.

Even if these early conversations do go well, inevitably there will be things larger customers ask for that you simply don't have yet. There are four critical questions you can ask to get ahead of their needs from the get-go:

- What are their must-haves from a current functionality perspective? And why? Often-times, this will be things like administrative capabilities, reporting functionality, security protocols and integrations or APIs.
- What are their must-haves from a future functionality perspective? And why?
- What are the nice-to-haves they hope will come in the not too distant future? And why?
- Lastly, what are your current differentiators that get them really excited about taking a bet on you and bringing your tool into their stack? And why?

If you don't have it, you're not good at it and the plan isn't for you ever to work on it, be honest with your stakeholders. The right early upmarket customer will ultimately be sold on the vision you paint for them, not on a checklist. People evaluating software vendors, especially people evaluating lots of them, appreciate transparency. It means you'll hear "no" more often than not, but getting to "no" faster is preferable. And when the time is right down the road, those same people will also remember you for it.

*The right early  
upmarket  
customer will  
ultimately be sold  
on the vision you  
paint for them,  
not on a checklist.*

# Sales channel partners accelerate growth, not create it

Steli Efti,  
CEO, Close.io



—— First, let's get the basics out of the way: If you're trying to get your first 10 or 100 customers, resellers and sales channel partnerships aren't the right channels for you.

If you've only just built a minimum viable product that you're trying to sell so you can learn from real customers, these aren't the right channels for you.

If you don't have a steady and stable stream of customers and monthly income coming in, these aren't the right channels for you.

Here's why:

1. Resellers and sales channel partners are strategies to accelerate and speed up existing growth, not to create it from scratch.

2. They are only good at selling something that already works. Their incentive is to keep their clients happy and make money. And if your product doesn't help them do that – if you can't prove that your product brings tremendous value to its users – then they're not going to put in the effort.

However, if you're six months to a year in; have a product that already has traction and growth; have experimented with and found success with content marketing, paid ads, and inbound and outbound sales; and are bringing in hundreds of thousands or millions in revenue, then it's a different story.

You want to only engage with them when the time is right and you're ready for that type of scale. Never before.

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Excerpt from "[When \(and how\) to scale your business with resellers and channel sales partners.](#)"



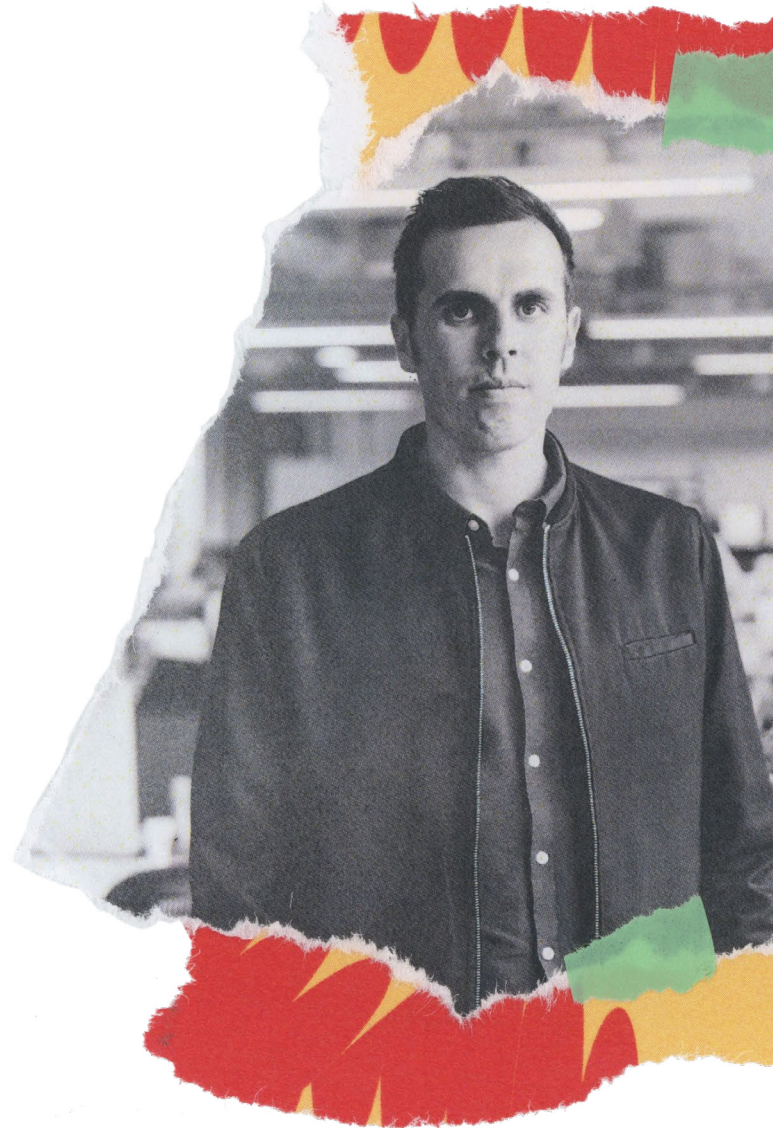
# You can't afford to treat SaaS customers like they're disposable

Stan Massueras,  
Director of EMEA Sales, Intercom

— Unless your business is transactional, nurturing your existing customers should be just as important as acquiring new logos. The way I see it, closing a deal is just the first step. It's what comes after – onboarding, upselling and cross-selling, renewal – that determines your customers' ability to grow with your product and, consequently, the fate of your own growth.

The cost of selling SaaS can be pretty high. The median SaaS startup takes [11 months](#) to make back the money spent acquiring a customer. In other words, you need your customers to be satisfied and willing to pay you for nearly a year. Otherwise, you're losing money on every customer you acquire, which will cause your company to flame out.

That's why I think it's so important to have account or relationship managers on your sales team dedicated to building relationships with



*It's so important to have account or relationship managers on your sales team dedicated to building relationships with customers.*

customers. It's a difficult job, but an important one. By being a trusted partner to your customers, a good relationship manager supports your business in three ways:

1. **Expansion:** Growing accounts that are spending a low amount but have high potential.
2. **Retention:** Maintaining accounts that are spending a lot and are at the top for growth.
3. **Contraction,** i.e. monthly spend stability: Fighting to keep customer spend at the same level.

If you want to achieve sustainable growth, you have to keep your customers around for as long as possible. The plain truth of the matter is that companies built on recurring revenue can't afford to treat customers like they're disposable.

# GROWING YOUR SALES GROWING TEAM YOUR SALES TEAM

Growing a sales team isn't as simple as putting a bunch of A players in a room and getting them to start selling your product. Sure, you might get a few more deals across the finish line and maybe even score a lighthouse logo. But this approach rarely succeeds in today's environment.

If you want to build a revenue engine that'll fuel long-term growth, you need to scale your sales org with intention. Only then will you have the foundation to consistently win new customers, upsell existing ones and see the kind of predictable growth that'll make, or break, your company.

An efficient and profitable sales org is the product of many strategic decisions – who you'll hire, what you'll pay them, how you'll onboard and train them and much more. When done right, your sales team won't just accelerate your company's growth; they'll enrich your company's culture and help build a better product too.

Whether you're scaling an existing team or creating a new team inside an existing sales org, here are the crucial things you should work through before any sales activity begins.

## The first goal in sales – get on track to building a big business

Karen Peacock,  
COO, Intercom

— If you run sales at a growth-stage startup, you have two jobs. The first is obvious: be the head of sales. The second is less obvious and that's to be a commercially oriented leader for the company overall. In some cases, you may be the only or first commercially oriented leader.

Why do you need to do both jobs? Because your goal, if you set your sights on the right thing, isn't to close a bunch of one-off deals in the next six months. It's to build a big business.

The outcome of having these two jobs is that you are a part of creating the go-to-market blueprint for your company. This requires you to be deeply invested in the product, constantly on the lookout for new ways to pitch and position it, and ready to pivot in the market



with different applications of it. You should constantly be taking what you and your sales team learn on the frontlines and using it to fuel ideas for new features or products that you think will help the business grow.

My advice for sharing these ideas is simple: first, start with a very specific articulation of the problem you and your customer want to solve; and second, prioritize. What is the most important, unmet customer need that you think your company should address? The biggest traps that sales teams fall into is prescribing solutions (“We should build X”), talking in generalities and indiscriminately passing along customer requests based on whomever they talked to last.

Let me share an example – here at Intercom, many of our customers use Salesforce. As a result, our sales team told our product team, “We need a Salesforce integration.” The product team invested in building a deep integration between the two products. Still, the sales team came back with, “That was good but we need an even better integration,” and they were right. But “better Salesforce integration” is a solution,

not a problem and it was far too general to know what our sales team or customers actually wanted.

The big “aha” moment for us was when our sales team started focusing on problems to be solved. Instead of saying “better Salesforce integration,” they provided details like, “As a sales ops manager, I want to assign live chat conversations to my team based on ownership rules in Salesforce.” That gave the product teams exactly what they needed and it enabled them to get creative about solving real customer problems. The product team quickly built this functionality and started flying through the asks, enabling the sales team to close more and more deals.

By being a commercially oriented leader who strives to be nimble, learns from the market and focuses on the biggest problems customers face, you will set yourself and your team up to build a big business.

# The top-down vs. bottom-up approach to sales

Peter Levine,  
General Partner, Andreessen Horowitz

—— I’m often asked the question of “Why sales?” by entrepreneurs and technical founders. The “why sales” question becomes even more pressing given the trend toward “bottom-up” product adoption – i.e. [offering a given product for free](#) or without a formal top-down sales motion, as is common with SaaS. Why not simply invest in hiring more engineers and let the targeted end-user virally adopt the product of their choice?

The answer is that unstructured, bottom-up, user-generated sales do not unlock the full value of a given product. If you build it, they may come...but they probably won’t discover – or take advantage of – every feature you want them to. Most users view a product only through the lens of their own use, not through the needs and habits of all the users in their enterprise (which

is a view someone at the top, such as a Chief Information Officer, is more likely to have). For example, a security or audit feature that is crucial to a CIO might be completely irrelevant to an individual user.

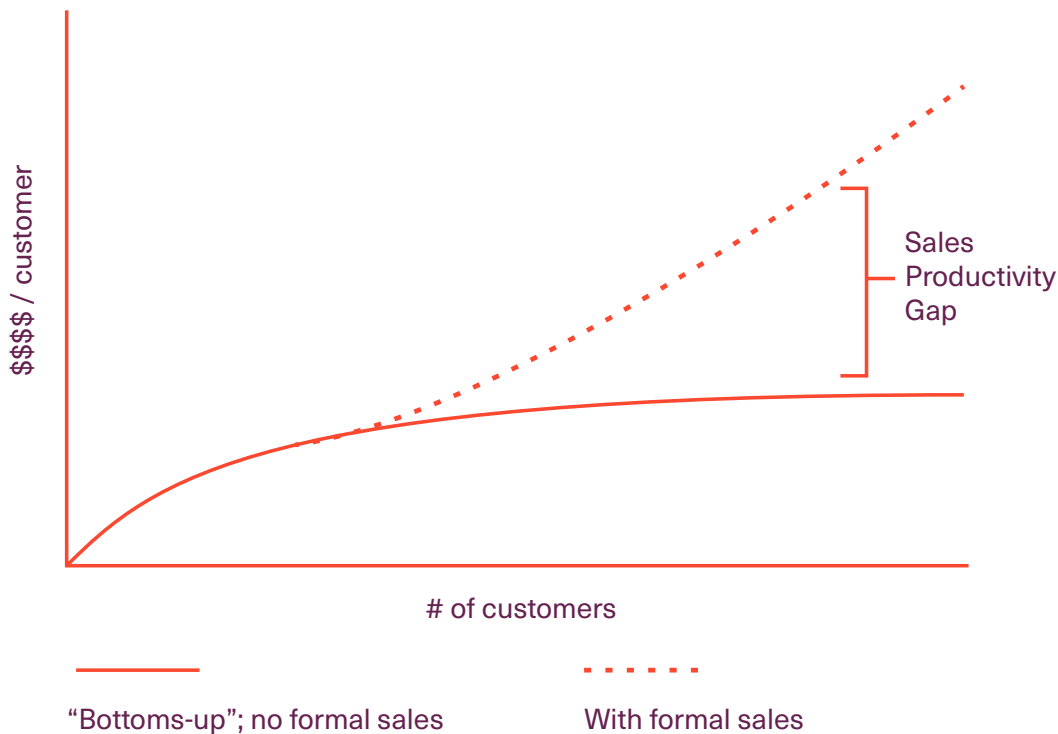
A formal sales function promotes the value of a product to an organization in ways that individual adoption and usage can’t. Salespeople can demonstrate the importance of features across the board, including criteria-setting, pricing, and packaging that unlocks more of the value the product is materially creating for an organization. The result is greater penetration into the enterprise, higher product appreciation and more revenue from a given customer.

This is not to say that bottom-up adoption is bad strategy; quite the opposite. Many great products



## Part II

see exciting initial revenue traction. The number of customers increases, and the dollars per customer correspondingly grow. However, as a product achieves broader adoption, the dollar per customer tends to flatten. This reflects an individual user ascribing a fixed value to a given product:



That's why combining a top-down and bottom-up approach by layering a formal sales function yields the best results. Although a sales organization might seem too expensive, the revenue it will add can far exceed the cost (you want your sales organization to generate 3x its loaded cost). Creating a formal sales organization will help accelerate revenue and product adoption, as well as result in more satisfied customers

## The optimal structure for your SaaS sales team

Jason Lemkin,  
CEO, SaaStr

— The optimal sales team structure is one that is accretive, where, roughly speaking, each sales rep brings in at least 5x his or her total compensation.

If the average sales rep produces more than 5x the comp she takes home, then:

- A SaaS company should be able to be cash-flow positive, at least by a few million in annual recurring revenue (ARR).
- You should be able to hire as many reps as you can find.
- Sales will not be a stress center from a cash perspective.
- Marketing costs can be managed.
- Sales Development Representatives (SDRs), specialization, and account management can all be funded.
- It all “works”.





*Sales doesn't need to be a cost center.  
It can be, and for at least most of the  
life of your company should be, a  
profit center.*

The sales-driven SaaS companies that are very capital-efficient generally end up at 5x or greater as a ratio of average quota attainment / average on-target earnings.

Where you burn a ton of cash is “buying” sales. Shoving sales reps into segments where you don't have enough leads or enough demand. “Starving” reps with too few opportunities. Brutal head-to-head competition in areas you might not otherwise compete in.

Buying sales isn't bad. It works. If you can raise a ton of capital, it's one strategy for winning and crushing the competition. But whatever you do, make sure you know the game you are playing.

Sales doesn't need to be a cost center. It can be, and for at least most of the life of your company should be, a profit center.

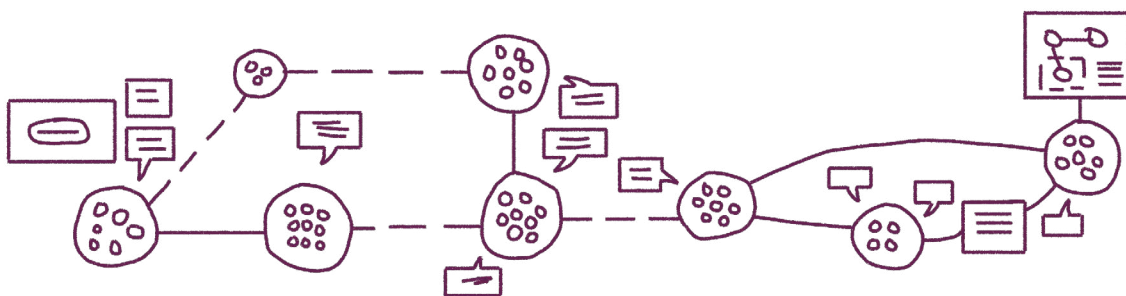
# Using the pod to structure your sales organization for maximum efficiency

Steli Efti,  
CEO, Close.io

— A pod model for your sales team creates focused tight-knit groups, or “pods” that comprise team members playing different roles. A pod-based organization is customer centric.

For example, a six-person sales pod would be composed of three SDRs, two AEs and one customer success rep. Rather than having large teams, you create little pods of specialized roles, and each pod is responsible for the entire journey of specific customers.

Dave Gray, author of [The Connected Company](#), provides this diagram of the pod model:



Pods are independent, adaptive, linkable and swappable



You still utilize the specialist roles of SDRs, AEs and customer success reps. But instead of having all of your SDRs or AEs compete against one another, pods compete with other pods. Each pod works together to win the customer, and keep the customer happy afterward. They're more fluid, and come up with ideas independently.

Pods are more modular and flexible than traditional sales teams. Because success is measured by pod, each member of the sales force has a larger, more holistic view of the entire company. Pods build more meaningful connections between people who are working together. It's perfect for mature startups trying to optimize existing sales resources to tap into new markets and verticals.

If you've established your market and have significant traction, organizing your teams into pods creates a highly flexible, agile sales force that's ready to meet a variety of challenges and pounce on new opportunities.

# Aligning sales and product

Des Traynor,  
Co-Founder, Intercom

— A great partnership between product and sales needs to be based on shared definitions of success and an agreed upon process to collaborate. Without these things, the relationship retreats to the magnetic stereotypes of both industries: Product teams think sales teams will do, say and sell anything to make money, while sales teams think product teams will build anything cool except things that actually make money. It's not a good place to be.

First, for a product to truly be considered successful, among other things it has to be:

- Valuable – solve a real problem people are willing to pay for.
- Marketable – be attractive enough to differentiate itself from competitors.
- Adoptable – have sufficient table-stakes requirements for features such that the majority of the market can adopt it.

- Justifiable – demonstrate its value as being greater than its cost (time and money) to the customer.

However, a great product is more than something that “the market accepts.” There are other hard requirements in building a successful product business. The product must also be:

- Secure – features must be added thoughtfully so as to not create new attack vectors.
- Scalable – every new feature must work for your largest customers and future largest customers.
- Reliable – business critical software can't have features with bugs that go unresolved for years.
- Usable – you can't build features with no cohesive vision that need layers of solution consultants to walk every new customer through them.
- Sustainable – the footprint of the product can't grow exponentially to accommodate every new feature request, which jeopardizes all of the above.

Product teams that don't understand the first



## Part II

list will never connect with sales. Sales teams that don't understand the second list will never connect with product.

Second, sales and product need a way to collaborate on the product roadmap. Sales is usually the only team that has in-depth conversations with would-be customers who couldn't proceed due to a product problem.

If your product team isn't taking roadmap input from your sales team, you're not listening to the potential market. You can go deeper in your current niche, but you'll never expand out of it, nor will you move upmarket.

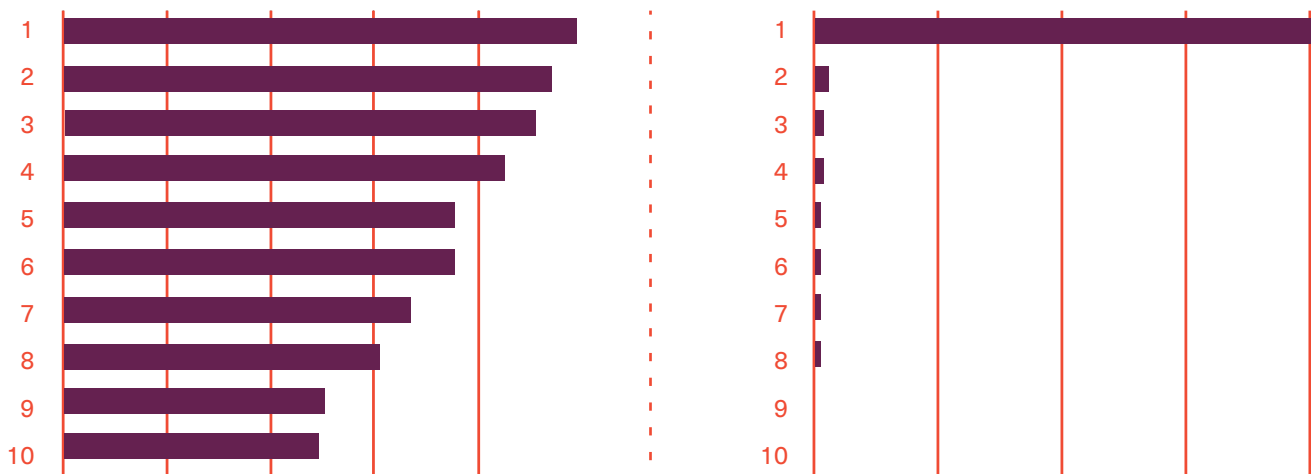
At Intercom we take inputs into the product roadmap written in the form of a "problem." Each problem is an atomic unit that articulates why a deal can't be completed. The problem

has an abstract statement ("I can't connect conversations in Intercom with my user record in my CRM"), a reason it's a problem ("Using Intercom would make my sales process too inefficient for SDRs who would have to copy and paste all day") and then instance details ("I need to see sales conversations in the HubSpot CRM").

In addition we capture things like:

- Stack rank.
- Order of magnitude – often the gap between #1 and #2 in the list is substantial.
- Status – is it currently being worked on?
- Persona – who in the buying process speaks to this need?
- Segment – what customer group does this first occur in?

*Separating feature requests by orders of magnitude*



Idea popularized by [Ken Norton](#)

All of this is refreshed at every roadmap session, and detailed discussions are had with sales as a new problem is tackled. It can be easy to let this list become your roadmap, and if you're really lacking the table stakes features in the market, that might be the right choice.

But it's important for both sales and product leadership to remember you can't "table stakes" your way to a dominant market position. You need to differentiate. Faster horses will get you only so far. Your roadmap should have many other inputs, such as iterating recent launches, new to market innovations and causes of customer churn. What changes and evolves is the weight of each input, depending on where the shared priorities are. A roadmap, at its core, is just a page of trade-offs, arguments and priorities.

*If your product team isn't taking roadmap input from your sales team, you're not listening to the potential market.*



## The sales acceleration formula for building a sales team

Tomasz Tunguz,  
Partner, Redpoint Ventures

—— If you want to understand how to build a great SaaS sales organization, you should read Mark Roberge's [\*The Sales Acceleration Formula\*](#). It's the single best book on the topic.

Mark was the Chief Revenue Officer at HubSpot, a company that has created tremendous success by perfecting the inbound marketing plus sales model. The book is invaluable for every founder, CEO and member of the management team because it not only explains how the HubSpot sales team is structured, but why the structure came to be.

The first employee at HubSpot and tasked with building the sales team, Mark developed a structured interview to qualify candidates and correlated the attributes of the best sales candidates. His list surprised me: preparation, adaptability, domain experience, intelligence and passion are the five characteristics of people most likely to succeed in HubSpot's sales teams.

## Part II

### HubSpot Sales Candidate Assessment

#### Candidate Summary

Candidate Name	John Doe
Date of Interview	1/1/2012
Interviewer:	Mark Roberge
Primary Criteria Score:	71%
Summary of Strengths:	<Insert Strengths>
Summary of Weaknesses:	<Insert Weaknesses>
Next Step Recommendation:	<Insert Recommended Next Steps>

Primary Criteria	Score	Weight	Weighted Score	Max Score
Coachability	8	9	72	90
Curiosity	9	9	81	90
Work Ethic	7	8	56	80
Intelligence	6	8	48	80
Prior Success	4	7	28	70
Passion	8	5	40	50
Preparation	8	3	24	30
Adaptability to Change	7	3	21	30
Competitiveness	8	3	24	30
Brevity	6	3	18	30
<b>Total</b>			<b>412</b>	<b>580</b>
				71%

With this knowledge in hand, Mark created a quantitative candidate assessment. Based on the linear regression mentioned above, the scorecard established hiring consistency and enabled the team to grow predictably.



# Why your sales team needs to care about more than quota

LB Harvey,  
VP of Sales, Intercom

— In sports, stacking your team with all-star players doesn't always lead to a championship. Similarly in sales, hiring *prima donna* salespeople rarely leads to a great sales quarter. Great salespeople care deeply about reaching and exceeding their own personal quota, but they care about the company too. How can you tell?

- They go out of their way to deliver customer feedback to product teams.
- They're dedicated to protecting your non-negotiables.
- They're fired up to help the team create best practices and scalable processes.

- They raise up fellow salespeople along the way and instinctively understand that the whole is greater than the sum of the parts.

While it's hard to directly attribute those things to helping hit quota, they'll lead to a better customer experience and a better product – which, ultimately, are easier to sell. It's a win-win.

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Excerpt from "[Hiring for sales in a product-led world.](#)"

## The one thing Jack Welch thinks all salespeople need

John Barrows,  
Sales Trainer

—— Passion is the one thing you cannot train. I worked with Jack Welch of GE for a couple of months to get his online MBA program off the ground, and when I started my first company way back in the day, Jack came to Boston to do one of his conferences. At that time, my company had 50 employees.

I stood up and I said, “Jack, look. You talk a lot about passion and all this other stuff. When we were five people starting this company, we were all super passionate. Everybody was on the same page. We got to 20 people and everybody was still super passionate. Now at about the 51st person we’re bringing in, it just doesn’t seem that they have the same passion that we do for the business. How do you instill your passion on somebody

else?” In front of 1,000 people, he basically told me I was an idiot. He said, “You’re looking at it all wrong. You can’t instill your passion in somebody else. You have to hire passion.”

That flipped my hiring persona upside down. I can teach skill, I can teach technique, I can teach product knowledge – I can teach all that stuff to somebody who’s willing to learn, but I can’t teach drive. I can’t teach passion. I can’t teach grit. Sales is a brutal profession. You literally get told “no” 99 times, and you have to keep coming back and asking for more so you can get that one “yes” in



*My job as a leader is to take that passion and connect it to my business so that you can bring a fraction of that to the table when you come work for me.*

100. That's why one of my favorite interview questions is, "What are you passionate about?" I don't care what you're passionate about; I care how you describe what you're passionate about.

For instance, if I asked you that question, you could say, "I really like customers and I really want to do right by them and make sure our product's a good fit." Or you could say, "Holy crap. Did you see what happened on Thursday night with the Patriots? They got absolutely smoked. I'm rip roaring pissed-off, but I think it's a good thing, because you know what? They needed to get knocked down a notch. I still think they're going 17-1 this year!" I don't care if football has nothing to do with what you and I were talking about; if you describe it in a passionate way, that means you have some sort of fire in you. My job as a leader is to take that passion and connect it to my business so that you can bring a fraction of that to the table when you come work for me.

## Hire salespeople who can blend art and science

Stan Massueras,  
Director of EMEA Sales, Intercom

— What it means to be a good salesperson is changing all the time. 10 years ago, being a good salesperson was treated as an art. You had to influence and persuade and be extremely well-spoken. Over the past five years, sales has become more and more about science. It's all about looking at data and predicting buyer behaviors and patterns.

I think right now a successful salesperson is someone who can do both. Someone who is very articulate, who can create content, can command an audience but who also has a fundamental understanding of modern communication tools like SalesLoft and Intercom. Even though more and more the sales process happens online, and more of the buying process happens before a salesperson is engaged, complex deals still don't happen without people getting involved – managing the relationships, navigating the buyer's ecosystem and successfully merging decision makers' objectives with desired outcomes (not to mention individual career aspirations, personalities, personal ambitions and so forth).

## Salary or bonus-heavy compensation: which model is best?

Devon McDonald,  
Partner, OpenView Venture Partners

— The short answer to that question is that at the expansion stage, the more you can leverage compensation for results, the better off you (and your sales team) will be in the long term.

Commission or bonus-focused compensation plans provide tremendous upside for growth and allow CEOs to truly leverage their people – all while those people are given ample opportunity to make significantly more money than if their income was largely dictated by a fixed salary figure.

Simply put, if your compensation plan is largely tied to your sales organization's ability to achieve specific objectives and targets, then everyone will be incentivized

to perform the kinds of revenue-driving activities that yield those results. The value that you place on certain performance measures will vary, but the idea is to create an environment that rewards urgency and provides upside for over-performers.

Ultimately, that model won't just help you appeal to (and retain) A-level sales talent, it will also make it easier to scale because your upfront investment in additional sales headcount will be less expensive.




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Excerpt from "[A Guide to Creating a Scalable Sales Compensation Plan.](#)"

# Align compensation to how your buyer buys

Elizabeth Cain,  
Partner, OpenView Partners



— This is my #1 rule in sales compensation. If you don't take anything else away from this, take the time to inspect your data and understand the natural buying process of your customer. Do your most successful customers start with a point of contact, land and expand and add modules/users/etc. over time, or do you have one shot to maximize your sale? If you do have a land and expand model, what drives that expansion – buyer, user or product? Between your data and your team you should be able to come up with a few hypotheses. From there, we recommend talking to your customers and lost prospects to validate.

If the most natural path to a successful customer is to land with one area of your product and grow the account over time, you need to ensure your sales team is incentivized to do that – do not pay them less for an upsell than you would for a new sale, or tell them they can only upsell for the first 3 months after purchase if you know that will put undue pressure on the buyer. You have to consider the customer experience when writing your sales incentive plan.

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Excerpt from "[Designing Effective Sales Comp Plans: The Dos and Don'ts for Every Sales Leader.](#)"



# How to determine the base salary / variable split

Michael Hanna,  
Revenue Operations Lead, Shopify Plus

— I recommend that you begin laying out your compensation plans by ironing out the base salary and variable compensation for each role.

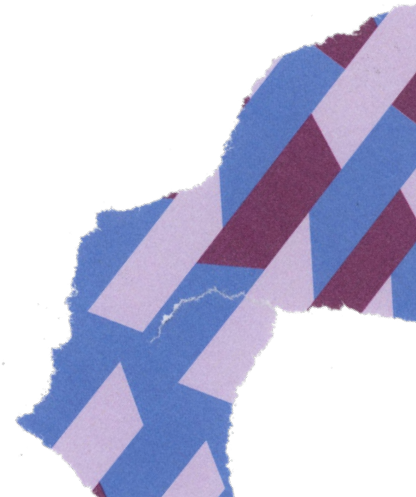
First, determine the role's base salary by assessing the following:

- Level of difficulty.
- Level of autonomy (how much are they out on their own?).
- Experience required.

The higher for each, the greater the base salary will typically be.

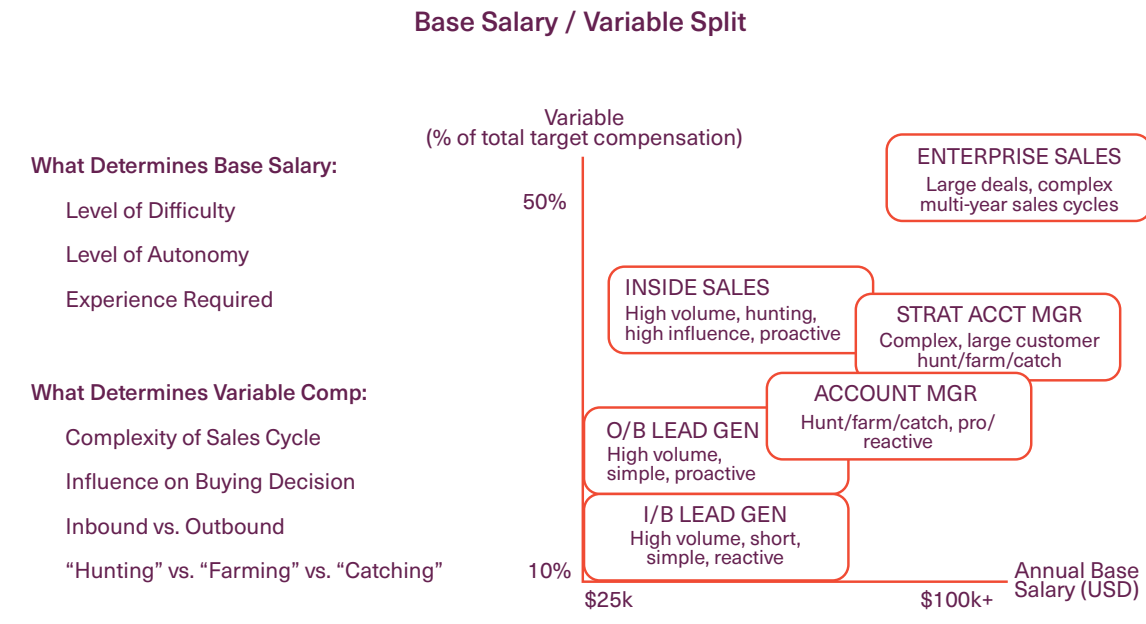
Next, determine the variable comp based on your answers to the following questions:

- How complex is your sales cycle?
- How much influence do reps have on the buying decision?
- Is your model primarily inbound or outbound?
- Is the focus of the role primarily hunting (outbound), farming (growing existing business) or catching (inbound)?



## Part II

Here's an example of where certain sales roles may fit on the base salary / variable comp spectrum in the graph below:



Once you have an idea of the total target compensation for the role, you can start determining the base elements that will drive your comp model.

## An onboarding process that will make sales reps stay

Tonni Bennett,  
VP of Sales, Terminus

— When I was new to sales leadership and onboarding reps, I did a lot of classroom style training and thought that once I shared a concept, my team would be able to absorb it and put it into practice immediately. I mistakenly trained people the way that met my learning style and capability, and expected them to know the material intimately right away. But I learned that taking into account different learning styles and preferences is incredibly important in helping sales professionals to retain the information long term, and that repetition of key concepts is vital for long term retention.

I now try to incorporate auditory, visual and tactile elements into my team's onboarding to meet all three learning styles, and ask new reps how they prefer to process information. Does role-play help them absorb a concept, or is



*Taking into account different learning styles and preferences is incredibly important in helping sales professionals to retain the information long term.*

sitting in a room alone reading over notes or talking out loud to the wall more effective?

Every time we onboard, we adjust parts of the onboarding based on feedback from our new hires about how they best retain information, giving them space to absorb the material and to practice in their own way. On top of that, we slowed down our onboarding program, stretching it across a longer period of time to make sure that at least the biggest topics and talk tracks are not taught once, but repeated or recapped several

times. Hearing, seeing and taking action on a concept over several days improves new hires' retention and long term understanding of the material, instead of simply facilitating regurgitation of the concept.

To further reinforce the training, our follow-up materials include a written version of a concept, a video or audio recording of a talk track by a leader, a couple of live examples from the field and then a requirement to execute a role-play or presentation of what the new hire has learned.

## Train for effectiveness, not just efficiency

Richard Harris,  
Founder, The Harris Consulting Group

— Efficiency has been the “sales du jour” topic of the month for the past 18 months. While efficiency matters and the sales stack is becoming more robust, what was thought of as nice-to-have has become a must-have (data, dialers, email, etc.) Now that we have made ourselves more efficient, people are finally realizing that efficiency is only 30% of the battle. The other 70% of the battle happens in the conversations.

This means both training and coaching are no longer merely something to consider, but something required.

Gone is the time when two days of features and benefits, a half day of CRM training and then a few hours of “ghosting the top rep,” (which turned into bullshit because they rarely ever got on live calls) are acceptable. In fact, if this is your sales training, just quit now. Go find a company who respects the role enough to give you guidance and support and help shorten your ramp time, and sees you as a benefit to the company, not a cost to control or manage.



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Excerpt from “[The Ultimate Guide to Winning Sales Conversations.](#)”

## Would your team go into battle for you?

Alyssa Merwin,  
VP Sales of Solutions Americas,  
LinkedIn

— At some point in our careers, all leaders invariably switch roles, inherit new teams or change companies. These moves represent huge opportunities, but they're also fraught with potential land mines. I learned the hard way that what made me successful in my last company would not necessarily guarantee my success in my new organization. I know this because my entry into LinkedIn was a rocky one.

For some background, I left a company where I'd established a strong track record over nine years to take a bet on building part of LinkedIn's sales team in New York. I stepped into my new role wanting to make an immediate impact and saw a ton of opportunity for improvement. Based on my prior experience, I knew I could build a highly

efficient team, instituting sales process and rigor, which the team sorely needed. But there was a problem brewing and I had no idea.

After being in the role for six months, I received my first 360-degree survey feedback. I was devastated to learn that I was rated near the bottom among my peers.

On top of that, Peter Kim, my manager at the time, shared feedback he had collected from other leaders, leaders whom I thought I was working well with and who respected my experience and input. The feedback revealed that while I had focused in my first six months on having a huge and immediate operational impact, I had underinvested in building relationships and aligning with the company culture. My survey results illustrated that I had not yet connected with my team.

Peter said, "Alyssa, people are describing you as robotic, abrasive and difficult to work with." But what stung the worst was when he said, "There are leaders whose teams would



go into battle for them. Alyssa, your team would not go into battle for you.”

That was the darkest day in my leadership career. I questioned whether I’d made the right decision to come to LinkedIn. More than that, I questioned whether I was fit to be a sales leader. I stewed over the feedback for days. It hit me hard.

After spending more time than I care to admit in my crisis of confidence, I realized I had two choices – I could continue to sulk, or I could make a change. I decided on the latter. But first, I had to look at myself in the mirror to figure out what was making people feel that way about me.

After deep introspection and discussions with Peter, I decided there were four things I needed to do differently, and immediately. The change happened for me in these ways:

1. I changed my space. I moved out of an office and onto the floor, sitting with and among my team. I gave up a permanent desk and floated around to open seats, always sitting next to my reps – I still do that today.
2. I started to walk the walk, literally. Rather than charging down the hall in my high heels, I slowed down my pace, I paid attention to how I entered a room or showed up to a meeting; my entire tone had to shift.
3. I focused on my emotional resonance with the team. Rather than leading in a directive way, I started to shift to a more supportive tone. Based on a suggestion from Dan Shapero, I also became more attuned to helping each member of my team to build on their strengths rather than focus on things I thought should be fixed.



4. I started bringing my whole self to work, allowing people to see all sides of me, to open up and let people get to know me, professionally and personally.

It took time, but eventually I was able to mend and build meaningful relationships. I evolved from a manager whose team would not go into battle for me to a leader whose team was so cohesive and high-performing that I was able to fulfill a lifelong dream of taking a three month sabbatical to travel around the world. The team didn't miss a beat while I was gone. That sabbatical would not have been possible if I hadn't had that career defining moment a year prior.

*I became more attuned  
to helping each member  
of my team to build on  
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# MODERN SALES

# TECHNIQUES

# MOD- ERN SALES TECH- NIQUES

Whether you practice inbound or outbound sales, getting prospects into your pipeline is important, and hard, work. The math is simple: the more opportunities you have, the more potential revenue for your business. But none of this matters if you can't keep your prospects.

The plain truth is that the buyer's journey is far from a predictable path from awareness to purchase. There are infinite ways prospects can get stuck in or even fall out of your pipeline – slow response time, confusing messaging, competitive offerings.

That's why having the proper sales techniques in your toolkit is so important. But let's be clear, these aren't silver bullets or short term hacks. When built into a rigorous sales process, these techniques are about skillfully and consistently connecting your solution to your buyers' needs. After all, nobody enjoys being sold to, and even less so when what they're being sold won't help them.

We've curated advice from some of today's most respected sales leaders on selling to modern buyers. You'll find guiding principles and industry tested tactics to inform your own sales process and, hopefully, help you close more deals.

# Sales is a supply chain

Jeffrey Serlin,  
Senior Director of Sales  
& Support Operations, Intercom

— Sales has become a science. The art is still crucial, but if you think about all the processes and activities involved in closing a deal, you have to have a science for putting it all together. When I worked in the auto industry, I helped build supply chains to get from tens of thousands of parts and thousands of activities to a working car. At its core, sales is no different.

Like a supply chain, sales has to be operationally efficient. The core principles of the Toyota Production System are to eliminate waste, or “muda,” and to drive out inconsistency, or “mura.” In sales, simply saying you want to acquire customers isn’t good enough. Your sales process has to deliver the revenue you want in a cost-effective and efficient way. This is accomplished by designing standardized processes and deploying technology. You need the operational backbone – the workflows, technology and training – so your sales reps can follow the right motions to consistently drive efficient growth.

Whether it’s in the automotive industry or in sales, operations are still operations. At the end of the day, you need a cohesive sales process to go from A to B to C to the closed deal.

*Your sales process has to deliver the revenue you want in a cost-effective and efficient way.*

# Optimize for speed, then thoroughness

Patrick O'Neill,  
Account Executive, Intercom

— In sales we usually optimize for one metric: revenue. How can we drive the most amount of revenue to our company? Catching a big whale results in a big payday for your company (and yourself). If your goal is simply to bring in revenue, focusing on potentially high-value accounts seems to make the most sense.

However, an oft-overlooked metric is time to close. The bigger the deal size, the longer the sales cycle and the greater the complexity. There are more people involved, more processes and functions to navigate – for enterprise prospects, we're talking security, legal and, the sales rep's kryptonite, procurement. Instead of convincing a single decision maker, you need to convince multiple teams that what you're selling will have a net positive impact. This means in-depth discovery (sometimes with more than one team on more than one occasion), numerous product demos, extended trials and pilots.



Small companies, on the other hand, are typically nimble and agile. For smaller opportunities, the speed of your first response is a crucial step to converting these opportunities to revenue. Just look at the numbers: [50% of B2B buyers](#) go with the vendor that responds first. Your goal here should be to get your small deals to close quickly, so you can use the time you've saved to work on your larger, more complex deals.

By optimizing for speed for potential customers at the lower end of the market and thoroughness at the top of the market, you'll find that both conversion rates and overall revenue benefit.

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Excerpt from "[The big whale and the long tail.](#)"





## To replace the status quo, ask why

Trish Bertuzzi,  
CEO, The Bridge Group

— In 1925, Edward Strong, Ph.D., a professor of applied psychology at Stanford University, made the concept of AIDA famous. AIDA, which stands for attention, interest, desire and action, is a simple framework for thinking about the stages buyers pass through when making a B2B purchase.

But nothing about B2B selling is simple anymore. To be successful today, you must align with the way your prospects think and work (often called the buyer's journey). I've taken a spin on AIDA and built a five-step framework for thinking about the modern B2B buying process. I call it The Five Whys.



	Prospect before	Prospect after	Corresponding sales stage
Why listen?	Crazy busy	Curious	Introductory meeting
Why care?	Curious	Interested	Discovery call
Why change?	Interested	Active	Pipeline opportunity
Why you?	Active	Committed to you	Forecast opportunity
Why now?	Committed to you	Committed to now	A win

As we walk through The Five Whys, put yourself in your prospects' shoes.

Column two (Prospect Before) is where prospects start when you begin communicating with them. Column three (Prospect After) is where they end up if all goes according to plan. The final column is how the Prospect After stage aligns to a traditional sales process.

Looking at the sales process this way, we can appreciate just how much effort it takes to move a company from prospect to customer. We can also appreciate what a journey prospects have to make from “unexpected sales call” to “this is something I want to pursue” and finally to “replacing the status quo.”



## Entice prospects with education, not product demos

Mark Roberge,  
Senior Lecturer, Harvard Business  
School, and former CRO, HubSpot

— “Hi Mark. This is John from Acme Inc. We help sales leaders like you gain visibility into your sales pipeline and improve the predictability of your revenue production. I would love to show you a demonstration of our product. Would you be available Tuesday at noon?”

My voicemail is cluttered with messages like these on a daily basis. What I dislike most about the message is that the offer is completely misaligned with my stage in the buying journey.

Likely, I am simply trying to understand how to frame the problem I have. So why would I want to see a product demo?

I am more interested in understanding the best practices to pursue my goal or address my challenge. I am interested in the research, proven tactics and peer stories related to my problem. An educational ebook, thought leadership webinar, or even a free consultation would be far more appealing to me than a product demo.

An educational offer not only yields a higher conversion rate to a conversation. The approach also positions the salesperson more favorably to help the buyer. Before salespeople pitch a product, they need to understand if they can even help the buyer and, if so, how. Only then is the offer for a product demo appropriate.

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Excerpt from “[10 sales leadership lessons I learned from 10 years at HubSpot.](#)”

## Straddle the line between hunting and harassing

Manny Medina,  
Founder and CEO, Outreach

—— One of the first rules of sales is you must learn, master and teach the art of the follow-up. Regardless of what you're selling, in today's digitally inundated world it takes more than one or two touch points to gain contact with a prospect. In fact, it takes an average of 18 calls (according to [TOPO's Sales Development Technology report](#)) merely to connect with a buyer.

The takeaway here is that persistence is key. However, there is a fine line between being persistent and being labeled a nuisance; that's where technique comes in. It may be tempting to release your sales team out into the world with a "volume is victory" mindset. But resist that temptation.

Instead, to create not just a touch point but ultimately a sale, make sure your reps offer the prospect something new and personalized at each and every engagement.

*It may be tempting to release your sales team out into the world with a "volume is victory" mindset. But resist that temptation.*

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Excerpt from "[Hit 'refresh' on that stale sales cycle and never miss your numbers again.](#)"

## Qualify leads for money that multiplies

Steli Efti,  
CEO, Close.io

—— In today's world, you should sell only to people whom you're convinced you can help with your product or service. You won't believe how much of a brand and career boost it can be to say "no" to people you can't help. Frequently, when we tell people that they shouldn't purchase our software, they start arguing with us! We say, "You're not going to get as much value because of X, Y and Z. We think there are better alternatives." People will never forget that we put their interests in front of ours. They will tell their friends. We have a lot of customers that came through recommendations and referrals because people feel like we treat them honestly and fairly.

Qualifying is the first step to any customer relationship. Many salespeople aren't committed to that step, because qualifying can sometimes feel like it's standing in the way of getting people's money. But if somebody doesn't have the money, the patience, the decision making power or the good manners



*In today's world, you should sell only to people whom you're convinced you can help with your product or service.*

to treat you well – if someone is abusive as a prospect – you should have the right to say no. This person isn't going to help you; they're always going to create issues and be unhappy. It's not worth your energy and time to invest in this relationship even if you think you can help them.

Some people will try to test me. They'll come up to me, point their finger in my face and say, "All right Steli, if you're that great at sales, sell me Close.io right now." And I always tell them the same thing: "I know nothing about you, nothing about your needs, nothing about what you're currently using. I'm not just going to sell you on my product; you have to sell me."

Then we can talk about it, and it's always a funny scene.

If you qualify people correctly, it's not just about getting money, it's about getting the right money – the type of money that multiplies. The type of money that's much easier to sustain. Money that doesn't churn, create bad support tickets or feel like a burden on your team because it was never the right fit. Attracting good money is so much more important to me than just getting people's money.

## Discover the problem that needs to be solved

Bardia Shahali,  
Account Executive, Intercom



— People buy software to solve problems but in order for your solution to be compelling, they need to know what metric they want to impact. “How are you measuring your goals?” is one of the most important questions you can ask in a discovery call. The answer will show you how serious the prospect is about solving the problem. Let’s say your prospect replies:

“We measure our 10 sales reps on monthly revenue. Currently their quota is \$70,000 per month and our lead conversion rate is 5%. If we increase our conversion rate to 8%, we can get an additional \$5,000 revenue per month per rep.”

You can use that answer to drive urgency for the deal, especially if it starts to stall. You can point back to the data and highlight how every month they wait will cost them \$50,000 in lost revenue.

Not having clear, measurable goals is a big red flag. If they expect to increase revenue but don’t know their lead conversion rate, it’s hard to establish realistic expectations for implementing your solution and doesn’t aid the handover to your customer success team.

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Excerpt from “[6 discovery call questions to help you prioritize your pipeline.](#)”



## People buy into what's possible for them, not you

Doug Landis,  
Growth Partner, Emergence Capital

—— If you look at your very first sales deck, probably the first slide is “Here’s who we are,” and then the second slide is “Here are all our customers,” and then the third slide is “Here’s the problem that we’re trying to solve.” That’s a problem, because the first three or four slides are all about you.

Customers want to know about themselves, and the only way they can compare themselves is if you give them insight into other people just like them. The first slide should say, “Listen, this is what we learned from our customers, who we feel are pretty similar to you. And the truth is, while you may think this is your fundamental problem, the reality is that you might have problems 2, 3, 4 and 5. And if you don’t have those problems now, you might well experience those down the road. If you think that’s possible, then let’s dig into what those problems could fundamentally mean to you and how to think about solving those.”

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Doug Landis, as heard on the [Inside Intercom](#) podcast.

# Your sales pitch should be a dialogue

Lars Dalgaard,  
Board Partner and former General Partner, Andreessen Horowitz,  
and former CEO of SuccessFactors, acquired by SAP

— Closed assumptions are bad for business, and they're bad for the pitch. Yet asking more open-ended questions at the end of the presentation is more or less useless, emptying them of any real meaning or intent. The heat, the energy, the opportunity to truly connect and make magic together is gone.

So, if you are attentive and listening during the pitch, you'll start a true, productive dialogue – one that will bring you and your customer together and help earn you the right to their business. Open questions – those questions where you clearly have not already made your mind up about the answer or your opinion on the customers' plan – signal that you invite feedback during the presentation. It's really signaling the desire to learn as well as to put their priorities first, to work toward their goals, to make all the information you give them relevant.

Finally, not only do these openings create moments to re-engage and to redirect toward those actual priorities (stated or unstated) that your target customers have, they also provide invaluable nuggets of information. And those nuggets can help you develop (if you're early to product-market fit) or hone (if you're further along) your own overall business.

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Excerpt from "[Ears: use them.](#)"

## Mind the gap between the existing state and future state

Jim Keenan,  
Sales Trainer

— Deals get stuck for lots of reasons. One of the big ones is that no one is finding or measuring the gap. The gap is the space between where the client is today and where they want to be tomorrow.

The gap influences everything. The bigger the gap, the greater the return; big gaps can also mean greater complexity, more change and more money. The smaller the gap, the smaller the return. Small gaps, however, should offer less risk, be less expensive and be less complex. Whether customers or prospects are aware or not, the gap plays a heavy role in their decision to buy or not, as well as how they buy. Do they move quickly or slowly? Do they get a lot of people involved or no one involved? The gap can't be ignored.



*The gap is the space between where the client is today and where they want to be tomorrow.*

To identify the gap requires a solid understanding of where the customer is today:

- How they do things.
- Why they do them that way.
- What the current outcomes are.
- What they are connected to.
- What the impact to the organization is.
- Who is affected.

The next part is to understand where they want to go tomorrow:

- How do they want to do things tomorrow?
- Why do they want to do them that way?
- What are the new expected outcomes?
- What will the new solution be connected to?
- What's the new impact to the organization?
- Who is affected?

Once the existing state is compared with future or desired state a gap should occur. It's simple

math:  $FS \text{ (future state)} - ES \text{ (existing state)} = \text{Gap}$ .

Once you know the gap, measure it:

- Is it big or small?
- Can you quantify it in dollars, time or units?
- Is it tangible?
- Does it affect a lot of people?
- Is it a lot of work or a little?
- Will it change everything or just a few things?
- How many people does it affect, and who?

There's your gap.

If the gap is small yet the cost is expensive, the change is complex or the risk is high, the sale isn't going happen. If the gap is large yet the cost is inexpensive, the change simple or the risk low, the sale will fly. If the gap is small and the cost is inexpensive, the change simple and the risk low, you're on track. It's a good deal. Stay focused, point out the benefits and move the deal. If the gap is big and the deal is expensive, the change complex or the risk high, you're still on the right track, but it's going to be a long sale. Work to minimize the risk, simplify the effort and keep the customer focused on the vision.



# How to win the criteria-setting battle

Mark Cranney,  
Chief Revenue Officer, SignalFx

——— No one knows more about your solution than you do, so you should be the one helpfully consulting with your target customer to craft what success looks like.

By doing this, you're more likely to win the criteria-setting battle, because you're essentially prepositioning and differentiating your enterprise/SaaS product over that of competitors. This helps block the competition and set traps that they have to compete on as you both step through technical validation.

The sales team's job, therefore, is to help a potential customer define success in three distinct buckets: (1) business criteria, (2) architecture/scale criteria and (3) feature and functional criteria.

This is also the best time to prepare messaging, metrics and marketing to address three audiences: (1) enterprise level (C-suite, senior vice presidents); (2) workgroup level (vice presidents, directors, managers); and (3) user level (groups of individual contributors and their direct managers). Since most startups – and big companies for that matter – spend most of their messaging effort on the first or third level, forcing your company to constantly see its prospects and customers through this three-level lens will be crucial to your company's win/loss ratio.

Here's how it all comes together:

### Influencing the Decision Criteria

Decision criteria	Examples	Message	Audience
Business criteria	<ul style="list-style-type: none"> <li>• Capability &amp; expertise</li> <li>• Customer base</li> <li>• Company stability</li> <li>• Leadership team</li> </ul>	<b>Data center automation</b> Cost, security, quality, visibility	CEO, CFO, CIO, CTO Dev, VP Ops
Architectural criteria	<ul style="list-style-type: none"> <li>• Extensibility</li> <li>• Integrated data model</li> <li>• Integrated server, network, storage, application, process</li> </ul>	<b>Server, application, network, storage, automation</b> Integration, standards, policy, cycle time, security	VP & director level, Sr. architects, CSO, technologists, engineers
Functional criteria	<ul style="list-style-type: none"> <li>• Simplified operational control of apps</li> <li>• Consistent user interaction models</li> <li>• Automatic update of policies</li> </ul>	<b>System admin, network engineer</b> Task automation, productivity	System admin, network engineer, managers, users

At this point of the sales cycle, there are many subprocesses and activities that have to be quarterbacked by the sales rep, sales engineering and sales management. The salesperson's ability to coordinate and drive the right resource, action or message – at the right level and at the right time – will determine overall success or failure.

This is key because enterprise/SaaS salespeople find themselves in a constant battle against the target company's urge to do nothing. Your biggest competition isn't other startups, perpetually licensed on-premise packages, homegrown solutions or incumbent vendors. It's inertia.



# Don't tiptoe around sales objections

Jill Konrath, International Speaker,  
Sales Strategist and Bestselling Author

— You have to be willing to raise the sales objections yourself.

And, before you do that, you need to figure out what you're going to say. You might even need to experiment with different versions before you find a response that works.

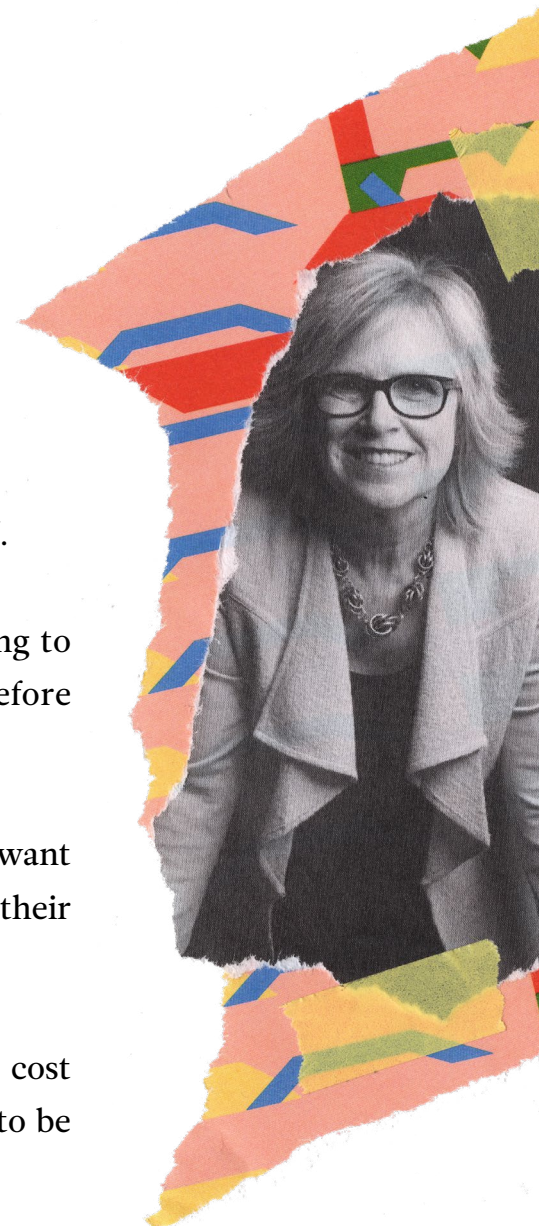
For example: pricing. If it's always a sales objection, then you'll want to address it early on. Ask your prospects if it's the key factor in their decision. They'll probably say it's important but not the only thing.

That's when you say, "That's good because we're not the lowest cost provider and there's a good reason for it." Of course, you'll need to be able to clearly articulate your value too.

Another example: Say you're a small company competing against the giants. It's something you can't change, so you need to deal with it. Bring it up early – and then talk about what you offer instead. More personalized service. Faster responsiveness. More customization.

There are benefits of being small. It's your job to convey them.

So what are the elephants in the room that you're tiptoeing around?



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Excerpt from "[Dealing with the dread of sales objections?](#)"

## There are no closing techniques

Alice Heiman,  
Sales Trainer

— Sales managers are always asking me to come and teach their salespeople some closing techniques. I'd love to, but the problem is that I don't know any "closing techniques." Anything you could do to make a prospect buy who doesn't want to would cause buyer's remorse or cancellation anyway.

Closing is just another part of the sales cycle. Closing a deal becomes hard only when the prospect is not ready to buy. That sounds simple enough, so why do sales that were supposed to close stall? Why do salespeople think prospects are ready to buy when they are not? How do salespeople get all the way to the end of the sales cycle with a prospect and not know whether or not the deal will close? It is because the salesperson has moved forward in the sales cycle but the prospect has not.

In these circumstances the salesperson may be thinking:

- "I've done everything I can, given you all the information I have, answered all of your questions and provided for all of your requests. Why won't you buy now?"



*Closing a deal becomes hard  
only when the prospect is not  
ready to buy.*

The prospect may be thinking one of the following:

- “I am not ready to buy so I don’t know why you expect me to.”
- “You have overwhelmed me with information that I now have to explain to the others involved in the purchase and they are all too busy.”
- “This was a priority for others in my company so I rushed to get everything they needed and now it is on the back burner and I don’t know what to tell you.”
- “Although I understand your product’s bells and whistles I still don’t really know if your product is the best solution for my needs.”
- “Our priorities have changed and I don’t have time to call you back or I feel bad so I don’t want to call and tell you our decision.”

Effective closing starts with getting commitment. Commitments need to be made in each step of the sales cycle by the prospect as well as the salesperson.

# REAL-TIME SALES

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The next generation of B2B buyers will shop for software in an entirely different way than most decision-makers do now.

Why? Put simply, times are changing. With the rise of 1:1 messaging and the on-demand economy, just about everything seems to be one click away these days. Customers are used to things happening instantaneously. So why are so many sales teams making people wait hours, days or even weeks before responding to sales inquiries?

If you think modern buyers are happy to buy software by filling out a form, waiting for an email follow-up, waiting to get qualified, waiting for a phone call ... it's time for a reality check.

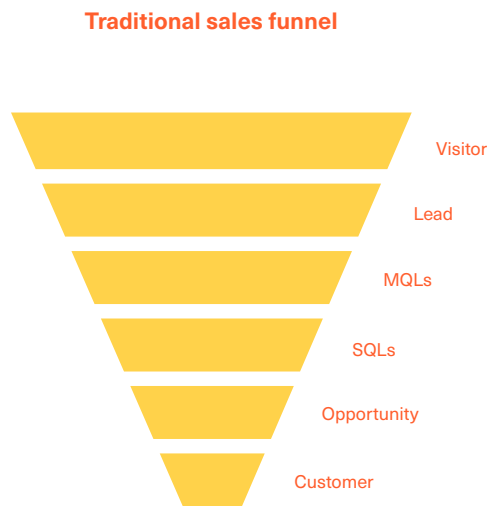
At Intercom, we've been pioneering a different approach – real-time sales. In a world where buyers expect their questions to be answered right there and then, while they're live on your website, we believe that real-time conversations will power the future of sales, not forms, cold emails or any other clunky form of sales communication.

# How real-time sales is disrupting the traditional sales funnel

Jeffrey Serlin,  
Senior Director of Sales &  
Support Operations, Intercom



— For many years, B2B companies have executed their inbound sales funnel in a similar manner:



Much like the word funnel suggests, it's based on the idea of filtering out the visitors and leads that aren't ready to buy or aren't qualified. Along the

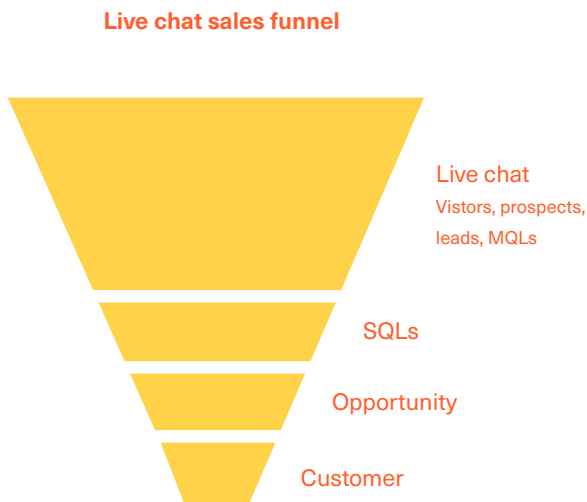
way, you'll make multiple touches in an attempt to connect with a lead – calls, emails, various calls to action – through a structured manner of how your sales reps interact with prospects. By continuously making incremental improvements to the process, you'll increase your conversion rates and grow your business.

The traditional approach takes time – a prospect who finds you organically through content may require a lot of lead nurturing to move toward a marketing qualified lead. Many sales teams aim for 12 to 18 touches over two to three weeks. Suffice to say, the longer it takes to make that first connection, the less likely your SDRs are to ever connect with those potential customers.

With live chat, our sales reps can connect with and qualify inbound leads within a couple of minutes. That's because they're able to do high-impact discovery and quickly find out things like:

- Why are you interested in our solution?
- How are you solving this problem today?
- What are your goals and objectives?
- What are your concerns and questions?

As a result, your sales funnel stages start to look a lot more like this:



You may notice that several stages are now one and you no longer need those 12 to 18 touches

to establish mutual fit. With live chat, you're connecting with prospects in real-time and qualifying them on the spot. Your team is now talking to leads who previously would've had to fill out a form and sit in a multi-week queue. Real-time interactions compress your funnel, leading to higher win rates and happier customers.





# How chatbots are augmenting the SDR role for the better

Stan Massueras,  
Director of EMEA Sales, Intercom

— Historically, the role of the SDR or BDR has been to collect qualification criteria to see if a prospect is promising enough to be introduced to an account executive. However, SDRs today, especially at Intercom, are doing much more than that – they’re accelerating the sale by providing prospects with value early on.

Thanks to automation and chatbots, SDRs can automate so much of what used to be manual, repetitive tasks. Nowadays, SDR teams can still collect information from leads and answer basic product questions in the middle of the night while they’re sleeping soundly in their beds. It frees up their time when they’re awake to focus on higher impact work further down the funnel.

Right now, our SDRs spend most of their time keeping pre-qualified prospects’ intent on using Intercom high by identifying which problems Intercom will solve for

them. That means providing prospects with educational content and jumping on demo calls to make sure that initial intent is carried through. Whereas before, our SDR team was incentivized to identify and pass along stage one opportunities (i.e. leads who have met qualification criteria), now we’re incentivizing them to move into the stage two opportunities, by having conversations and confirming customers’ use cases.

Ultimately, we try to have [our chatbot](#) do the stuff that bots are good at (capturing a lead’s details, asking some simple qualifying questions) and leave the stuff humans are good at (understanding customer pain points, solving their problems and building relationships) to the humans. The effect of this is that SDR teams are shifting from repetitively posing questions to being seen as an increasingly strategic assets. In the years to come, we’re betting that chatbots will make sales teams even more important, not less.



## Staying personal at scale

Tonni Bennett,  
VP of Sales, Terminus

Technology has enabled customer-facing teams to engage with buyers more efficiently than ever before. But with this trend, engagement has become automated and disingenuous. As an early employee at both a marketing automation company, Pardot, and later at a sales automation company, SalesLoft, I saw firsthand how automated emails could have a negative impact on sales relationships when leveraged incorrectly.

However, when leveraged correctly, channels such as email, live chat and in-app messaging can be a very effective way to communicate with buyers on their terms. Live chat and in-app messaging in particular are so powerful because they facilitate real-time, unintimidating communication. The ease of use combined with the quick response time makes these channels appealing ways for buyers to communicate with companies, especially at early stages of the buying process when prospects are gathering information and want quick answers.

Today's consumers want information at their fingertips quickly, and B2B buyers are carrying this trend into their business purchases. Companies that provide prompt, succinct and friendly support during the sales process are winning more deals, especially those companies which have short sales cycles and/or that allow for free trials.

A word of warning: be sure to create a strategy for who will manage real-time conversations and how reps communicate this way. Chat is a completely different channel than email – it requires faster responses and allows for more creativity. Your reps should be focused on diagnosing the needs of qualified prospects and providing them with a personalized experience, not having conversations with every person that comes to your site.



## Drive growth and scale through automation

Karen Peacock,  
COO, Intercom

— In life and in business, there are certain times when it's particularly important to get a helping hand and particularly impactful to give a helping hand. This could be your first day on a new job when you're thinking, "I could really use a little guidance here." Or it could be when you have your wallet pulled out and you're wondering, "Do I want to buy the basic or the pro version?"

The point is that these are times when you want help immediately, not one day or even one hour later. That's why in sales, when customers are thinking about making a purchase, you should have a way to answer their questions in real time. In fact we've found that, when businesses engage website visitors through live chat, they're 82% more likely to convert and pay 13% more than those who don't.



The thing you'll need to decide is, is it a person chatting with them or a bot? The answer is that it should be a combination. The mix and how it works should depend on three things:

First, high-growth businesses (and even businesses that aren't growing quickly but who care about efficiency) should have bots handle all of their basic, repetitive sales tasks like answering commonly asked questions or scheduling meetings with the right people. The goal is to get customers the information they need fast – ideally, in real time – and whenever a bot can do that, it's a better experience for the customer, because it's faster and more efficient for the business.

Second, humans and bots together beat humans or bots working in isolation. When your bots are working, always be clear that it is a bot, and if you can, give your customers an outlet to talk to a person. If there's one thing only people can do, it's this: have conversations with empathy and intelligence. Be wary of recreating the experience of interactive voice response systems. Your customers will only “press three for more options” so many times to get to a person before they bail out.

Third, use your bots to ensure that the right prospect or customer gets to the right person quickly. Your highest value prospects should go to the right folks on your sales team. Your most valuable customers should go to their account manager or whoever can best answer their question. If your business is built around a lower touch and lower cost model, use a bot to get customers to the best self-serve solution.

The future of sales will happen in real time. If you want to unlock massive growth for your business, now is the time to start combining the brilliance of humans with the scale of bots.

*Humans and bots  
together beat  
humans or bots  
working in isolation.*



# The consumerization of B2B sales

Mathew Sweezey,  
Principal of Marketing Insights,  
Salesforce

———— There has long been a debate among businesses as to how their buyers buy, largely expressed in the terms of B2B (business to business) and B2C (business to consumer). A business purchase, such as selecting a blog software, is very different from a consumer shopping for a road bike.

Or is it? The business strategist Jay Baer has said, “Our personal and commercial lives have collided in unprecedented ways.” The behaviors and attitudes we’ve adopted in recent years—thanks to our daily exposure to smartphones, social channels, and other tech advancements—are blending into our business lives.

In other words, our expectations of companies when we’re in the role of “business buyer” are advancing along a similar path as our expectations as consumers. A recent study by

Salesforce Research, “[State of the Connected Customer](#),” validates this idea, proving all buyers have the same fundamental expectations regardless of the type of purchase.

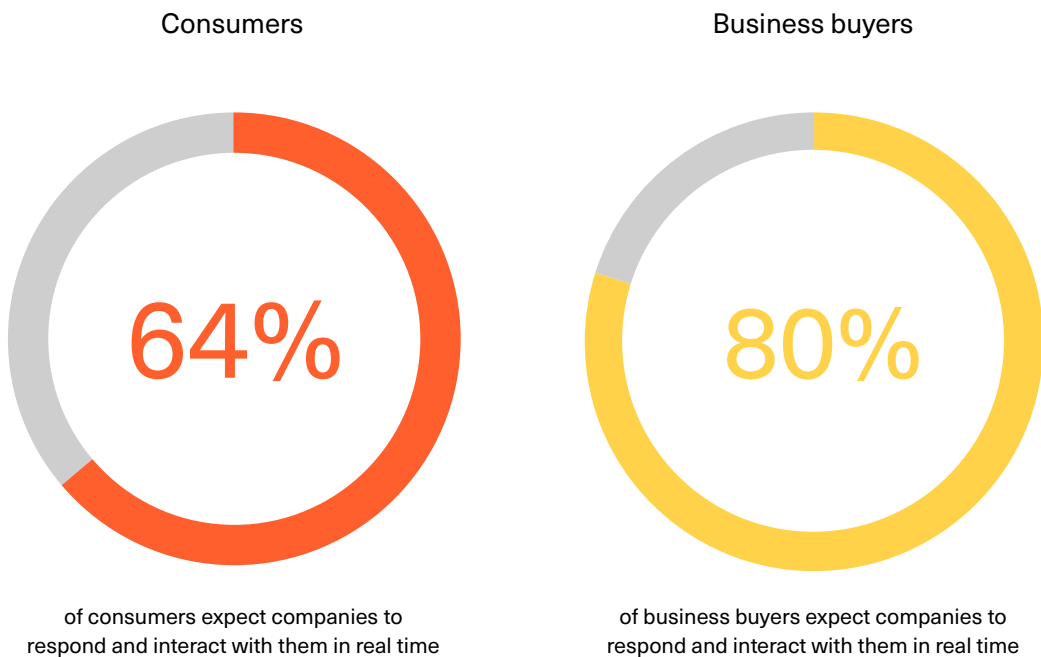
This research surveyed more than 7,000 consumers and business buyers globally. In the report, consumers reported “their personal purchasing, service, technology, and engagement preferences,” while business buyers self-identified as “employees having purchasing power on behalf of B2B companies.”

The study shows that B2B marketers can no longer afford to tell themselves that B2C marketing trends don’t apply to them. It’s not that B2B and B2C audiences are the same, but rather, the research reveals that consumers’ expectations of companies are very similar for both B2B and B2C buyers.



## Part IV

While “real-time interactions” in the B2C world may point to social channels, the ability for B2B companies to respond immediately is no less important. In fact, 80 percent of business buyers expect companies to respond and interact with them in real time.



The implications of this are simple but immense: Your business buyers expect the same level (if not higher) of real-time attention and personalized interactions as consumers. If they don’t see B2B marketers making strides toward delivering that, they’re well positioned to find another provider who will.

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Excerpt from “[80 Percent of B2B Buyers Expect Real-Time Interaction](#)” and Salesforce Research “[State of the Connected Customer](#).”



## Reaching your invisible pipeline

Richard Harris,  
Founder, The Harris Consulting Group

— In the age of the internet, most buying decisions begin long before the selling organization becomes aware of it. Invisible buyers perform invisible Google research. They narrow their invisible choices through sites like G2 Crowd and LinkedIn. They invisibly decide which companies to contact.

*This invisible sales pipeline is made up all of those people visiting your site who are never going to fill out a form.*

This invisible sales pipeline is made up all of those people visiting your site who are never going to fill out a form. The challenge then becomes how you can get visibility of buyers in the invisible sales pipeline, find the ones worth talking to, and then connect with them?

Existing CRM and marketing tools only have visibility into your real pipeline, hence the value of products like Intercom's. You can shine a light on a visitor's IP, and you can use that data to try to generate more inbound and outbound leads. Through technology, you could start doing more ABM and targeted ads based on tracking mechanisms, and you could then turn that data over to your SDR team and have them do outbound to generate a constant stream of sales ready leads. But until businesses identify this as something to focus on, these people are just invisible, and you're leaving cash on the table.

## Fill your funnel with the right kind of customers

Patrick Campbell,  
CEO, ProfitWell

——— When you prompt potential customers to click on a free trial offer and convert, you're sneaking leads into your funnel. This leads to inevitable user churn when those non-ideal users aren't willing to pay for your product's value.

Instead, you need to understand who your customers really are and what they want. Then you need to deliver that value to them within your funnel. When these customers convert, they'll be sure that your product is the right tool to solve their problem, and you can be sure that they have a real need for your product.

Understanding who your customers are and what they want means collecting demographic information, feature preference information and willingness to pay information in order to create robust, quantified buyer personas. Then you can fill your funnel with the right customers by showing how your product matches their needs.

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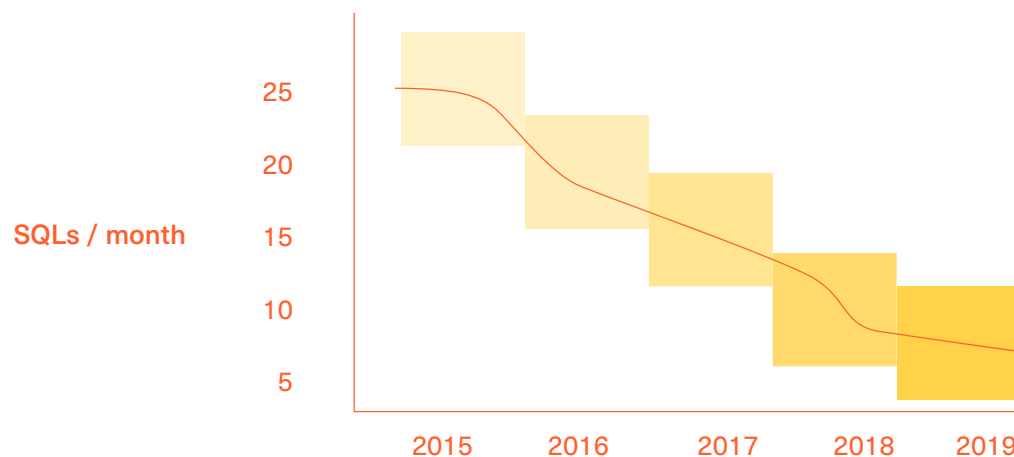
Excerpt from "[Your Direct Conversions are Bringing in the Wrong Customers.](#)"



# Speeding up your sales cycle

Harold Rogiers,  
Sales Expert, Winning by Design

— The world of outbound prospecting is not doing too well. Companies are consistently reporting that results from outbound are getting harder to attain. Low conversion rates from email sequences are creating more noise than actual results. GDPR regulations are making traditional outbound prospecting tracks even more challenging. As a result, sales managers are having increasing difficulty finding and motivating SDRs who have to operate on a daily basis in these troubled grounds.

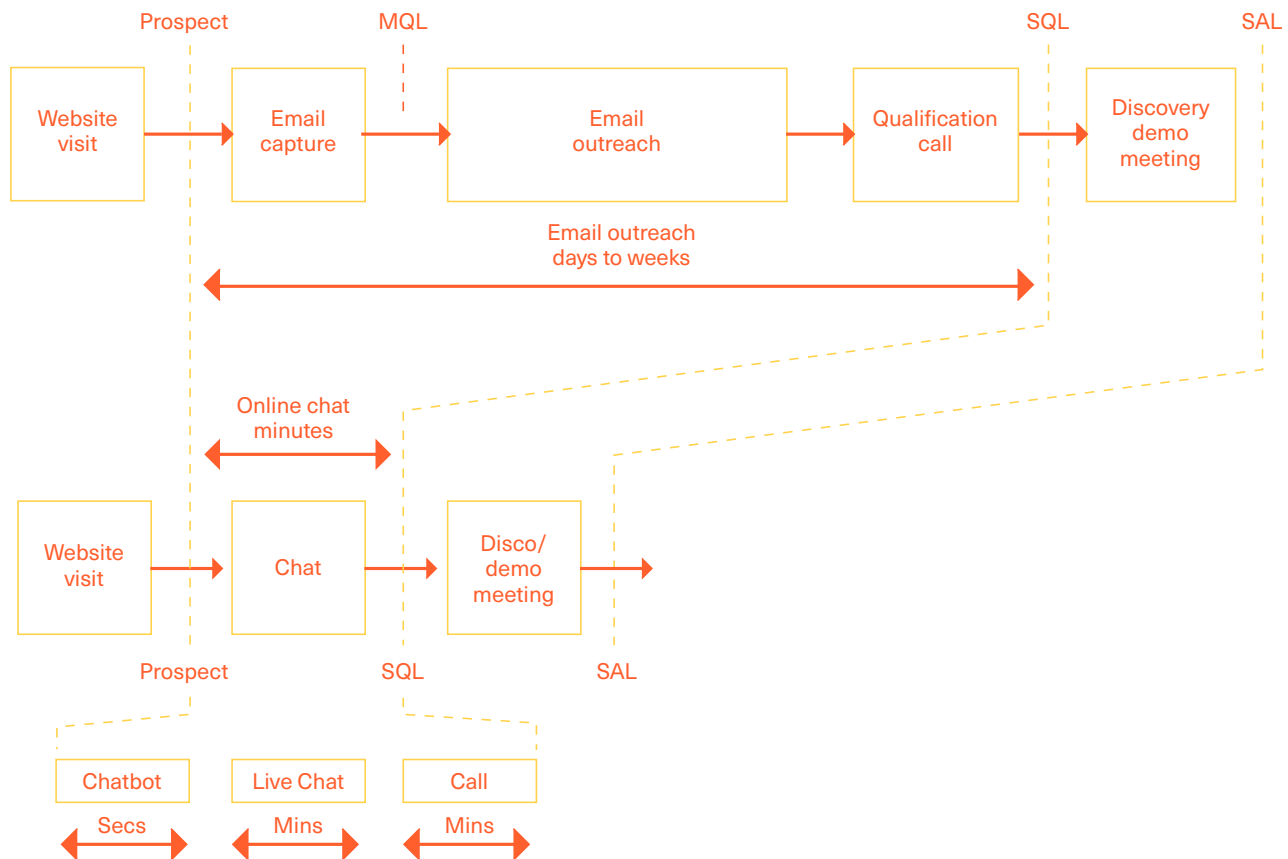


That said, we still need to grow our companies. The big question is how we will compensate for that loss of lead generation potential. Where are those new untapped gold mines? We've seen SDRs achieve great results prospecting through video. Other teams are having more luck finding fresh leads through review platforms such as G2 Crowd and Capterra. The craziest one I've seen recently was the SaaS company Intuo quite successfully reverting back to personalized print mail campaigns. Oh yes, print!

But one way of finding leads is too often overlooked: inbound via website chat. These leads are already there but are just not being converted.

First and foremost, conversing through chat shortens your sales cycle. The moment a prospect leaves your website after entering his email address in a form, his focus goes to the next problem of the day. In a traditional process it's now up to the SDRs to reach out to

him in the hopes of booking a call or a demo. That's when the process becomes lengthy and difficult, because the prospect has left his engaged mindset. Prospects are much more willing to start a conversation during a website visit, when their mind is open to discovering the product. That key moment needs to be leveraged right then and there to start a guiding conversation leading to a demo.



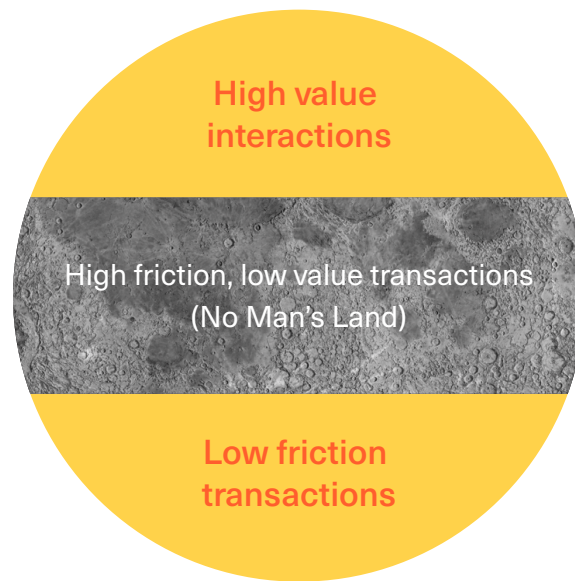
Excerpt from "[How To Leverage Live Chat & Chatbots For Lead Generation.](#)"

## AI will reinvent sales... and sales professionals

Jill Rowley,  
Chief Growth Officer, Marketo

— AI is destined to be the perfect tool to fuel organizations' sales efforts and power sales teams with genuinely intelligent tools to more effectively organize their work and sell more. It will not displace the salesperson, but instead amplify and accelerate the salesperson's ability to understand and employ data – not just to improve productivity and boost performance, but to improve the customer experience.

So my view of the sales landscape looks like this:





## Part IV

From a buyer's perspective, she wants one of two things.

If at all possible, she wants to go right to her car ... or to click one button. These are low friction transactions that the buyer wants to perform as quickly and easily as possible. Translation: she doesn't need a sales professional's help.

By the way, if you are skeptical of this, GE is already selling motors on eBay.

But there are still many circumstances in which a knowledgeable, capable and perceptive sales professional adds value. You wouldn't sell your \$100 million company by pressing a button. Neither would you hire a consulting firm in this manner when the assignment was to make the right investments to support your digital transformation. For the foreseeable future, human beings will be needed to guide high value interactions.

But most sales professionals do not operate in the opportunity rich space at the top of my drawing. Instead, they dwell in No Man's Land, which is what I call that middle wasteland filled with high friction, low value transactions.

I can tell you with absolute certainty that countless tech companies and startups will relentlessly target and ultimately erase the middle wasteland space; in fact, Salesforce is making big bets on AI with its machine learning enabled technology, called "Einstein," which will allow salespeople to work faster and know the best move to make next. Ten years from now, my diagram will look very different: the bottom section will be twice as large, and No Man's Land will be tiny.

## Introducing the role of the real-time sales rep

LB Harvey,  
VP of Sales, Intercom

— Customers today enter the sales cycle full of knowledge, opinions and feelings about your product and your company. They've already educated themselves. They might have even played around with freemium versions of your product.

Personally speaking, this is how I buy. You want to catch me when I'm most interested – that is, clicking around your website and investigating your offering and pricing. This is the best time to catch my attention and if the purchase is straightforward, push me across the line to start a trial. If the purchase is complex, this is when I'm ready to start a strategic conversation about what your solution will do for my business

That's why we created an entire team dedicated to real-time sales. Our real-time sales reps focus on our smaller accounts, the ones in between

our self-serve and mid-market customers. Their mission is to convert those smaller accounts into customers by first, getting them to start a trial while they're on our website and second, once the trial is complete, helping them get started with a paid plan.

Our real-time sales reps have a hybrid role that mixes the responsibilities of an SDR and an AE. Along with qualifying leads and doing a light discovery, they're also getting prospects into the product, helping them see value and closing them. Their biggest challenge is ensuring that by the time the free trial is over, prospects are sufficiently persuaded to hand over their credit card.

When you're first implementing real-time sales, I recommend running an A/B test. That's what we did here to ensure our real-time sales reps were adding value, not just doing more work, by spending time with these smaller accounts. What we saw was that smaller accounts who had engaged with our real-time sales reps not only paid us more but also were less likely to churn. The point is that when done right, real-time sales should and can be accretive to your business.

## Giving salespeople time to focus on what they do best

Sujan Patel,  
Co-founder, Mailshake  
and VoilaNorbert.com

— In sales, you have to juggle a lot of balls: prospecting, following up, nurturing, answering questions, providing information... and, eventually, making the sale. Much of that is tedious, repetitive, and takes away from the time you have to truly connect on a one-to-one personal level.

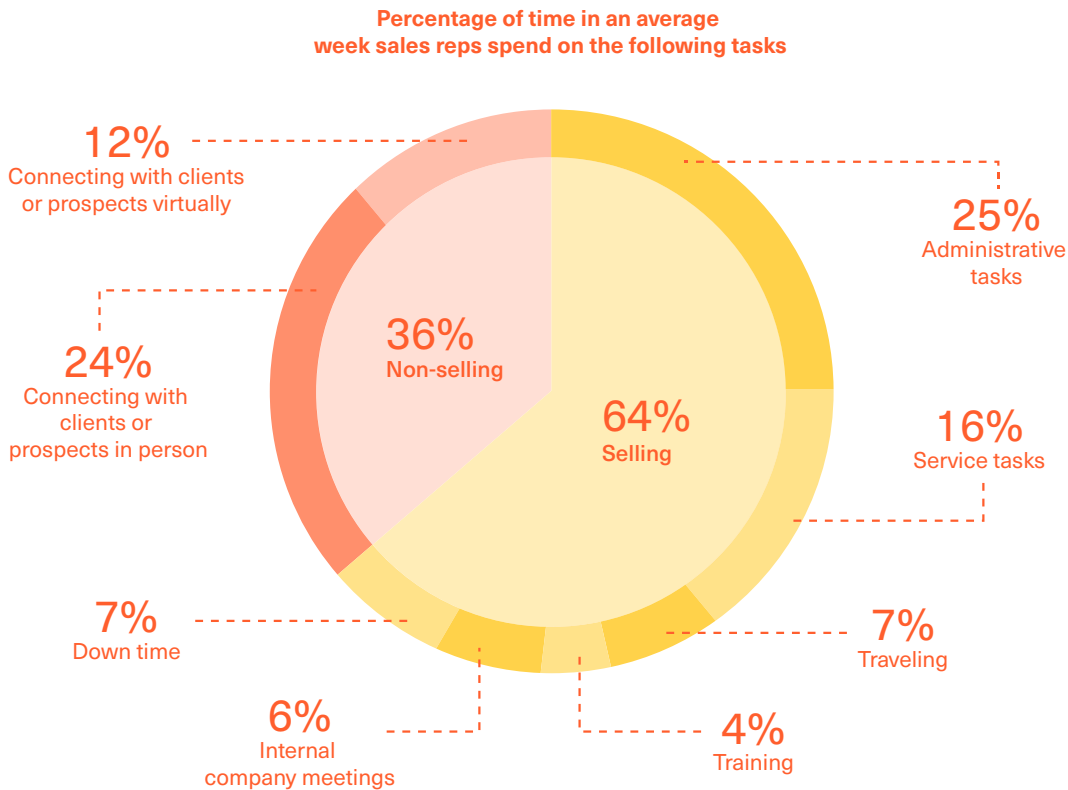
But what if, by automating, you could eliminate the laborious but necessary tasks from that list?

Nearly two-thirds (64%) of a typical sales rep's day is spent on non-selling tasks. Automation can reclaim lost time, and make selling the lion's share of how you spend your days – which is how it should be.



## Part IV

Sales Hacker reports that the average sales rep spends six hours each week prospecting on LinkedIn alone. Throw other social media platforms and channels like blogging, cold calling, and cold emailing into the mix, and it starts to add up.



If you removed those dreary tasks from your plate, how much more time would you have for real engagement and personal attention with qualified leads and existing customers? Hint: plenty.

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Excerpt from "[How Automation Can Open You Up to the Human Side of Sales.](#)"



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internet businesses accelerate growth