Predictable Revenue

PART 3

Outbound Sales Learnings from 2018

A complete guide of Predictable Revenue's 2018 Podcasts

COLLIN STEWART

INTRO

Predictable Revenue is the "Outbound Success Company". We help companies grow faster with Outbound Sales.

Our Co-Founder Aaron Ross is the author of the book **Predictable Revenue** and was one of the first 150 employees at Salesforce where he built the outbound methodology that is practiced around the world in sales teams today. **Our other Co-Founder, Collin Stewart,** is the host of our weekly podcast where he interviews B2B sales leaders on the biggest opportunities and challenges in the industry.

We've taken all of our podcasts from 2018 and put them into a handy 6 part eBook. Learn how to overcome the biggest challenges facing B2B sales teams today, ensure you're leveraging opportunities, and learn from best practices from industry leaders.

Collin Stewart, Co-Founder of Predictable Revenue. Host of our weekly podcast.

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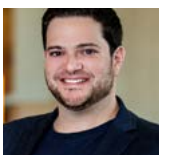


How marketing and sales development collaborate to help Big Health connect with, educate, and close Fortune 500 companies with Mike Radocchia

PODCAST

Mike Radocchia.
Marketing and Business Development Lead at Big Health

Let's face it: work, regardless of what you do, is tough.

Producing day after day, month after month, and quarter after quarter (I could go on, but you get the point), will grind even the strongest amongst us down. This isn't a criticism of the modern psyche – far from it, in fact.

It's a realization, one we've been coming to collectively for years now, that good mental health is a pillar to good performance. Meeting those quotas, shipping those products – whatever it is you do – is best done from a place of clarity, rest, and, ultimately, happiness.

It's a big task, to be sure. Saying you should rest, take time for yourself, and maintain a positive outlook are all easy sentiments to share, but much harder to execute when you're in the trenches.

Mike Radocchia, Marketing and Business Development Lead at Big Health, knows this first hand – that's why he, and his company, are on a mission to help millions get back to good mental health.

BACK TO CONTENT

It's also why he makes sure he gets enough sleep. "I get between 7 and 8 hours per night," says Radocchia.

"The National Sleep Foundation actually recommends adults get between 7 and 9 hours of sleep, so I'm getting enough, even if it is on the lower end."

Mike's role at Big Health

To help Big Health succeed in its admirable, and ambitious, mental health goal, Radocchia leads the companies growth department, which consists of sales development, marketing, and partnerships.

The intertwined nature of the department, says Radocchia, has been a *"great experiment"* because it's helped align the three departments involved, and makes supporting each other in their quest to produce qualified meetings a consistent piece of their daily routines.

> *"The thinking behind that grouping is to have alignment between functions to extend the role of marketing to the top of the sales funnel and beyond. We're all working for the same goal – new qualified opportunities,"* says Radocchia. *"So, working together helps us get there, and provide support wherever we can, and close deals. It's been a great experiment because we're always iterating and learning."*

Big Health's growth team reports to the company's Chief Commercial Officer, who also oversees sales and customer success as well. This is an important point to consider – because Radocchia's growth team reports directly to a C-level executive, it gives sales development a seat at the leadership table.

(**Editor's note:** we had an in-depth interview with Lars Nilsson, CEO of renowned Bay Area sales consultancy SalesSource, a while back about getting sales development a seat at the leadership table. You can listen to our chat **here**, or read about it **here).**

How Big Health focuses on the right accounts

Big Health, typically, sells to big companies – the Fortune 500, and the like. In the company's early days, they hadn't yet solidified their Ideal Customer Profile. They had a couple big companies under their belt, and they knew they wanted more, but that was about it. Big Health needed to hone in on the right accounts.

"We wanted to make sure we were focusing on the right companies," says Radocchia.

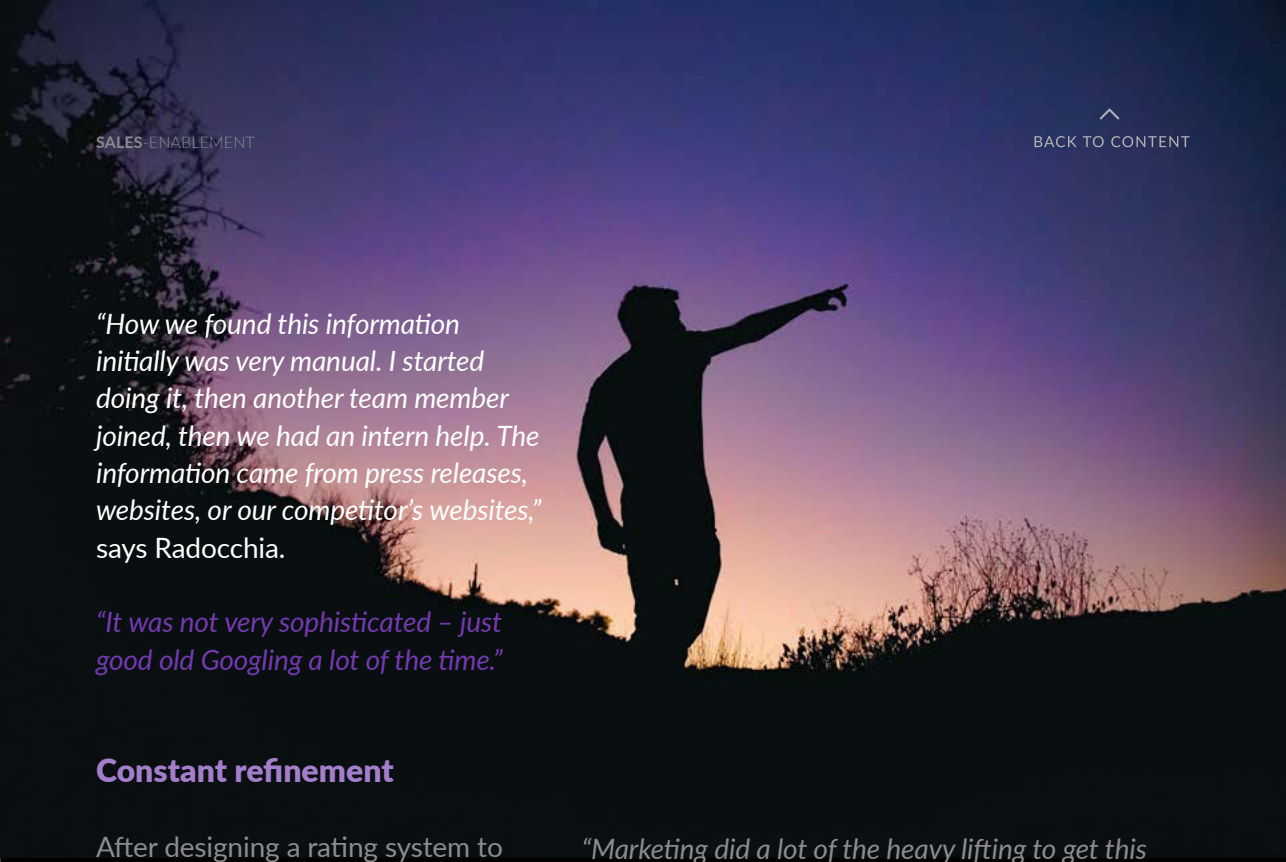
"So we really went down that path, because everything flows from that point. Everything we do is trying to break into accounts, so we better be sure we're breaking into the right ones."

To make sure the Big Health growth teams have a clear picture of the spectrum of accounts, the company has built an intricate grading system of accounts, directly into Salesforce. The grading system is based on a host of different data points – from the roles and titles employed at the company, to its performance in the markets (assuming it is a public company), and whether or not they've been recognized for the wellness or mental health efforts in the past.

In total, Big Health assigns it's accounts between 10 and 15 points, depending on the applicable attributes an account possesses. The higher the point total, the better fit that account is.

Here's a breakdown of just some of the aspects Big Health considers when evaluating accounts:

- **Award Winner:** 2 to 3 points
(whether they have been recognized as a healthy company)
- **Trade organization:** 1 to 3 points
(are they a member of a health-focused trade organization)
- **Works with a partner:** 1 to 3 points
- **Works with a comparable vendor:** 2 to 3 points
(have they partnered with a vendor for diabetes)
- **Works with competitor:** 2 to 3 points
- **Industry:** -1 to 1 point
- **Stock performance:** -2 to 2 points



"How we found this information initially was very manual. I started doing it, then another team member joined, then we had an intern help. The information came from press releases, websites, or our competitor's websites," says Radocchia.

"It was not very sophisticated – just good old Googling a lot of the time."

Constant refinement

After designing a rating system to help them interpret which accounts they should focus on pursuing, Big Health decided to build that method right into Salesforce.

Why not have the CRM they use everyday reflect this critical data?

"I have heard from people in marketing that there is often a ton of time spent on defining these type of workflows, but they aren't integrated into people's workflows. So, we really wanted to make sure we made this as part of our workflows, and made sure it was part of our day to day It became part of our system," says Radocchia.

"Marketing did a lot of the heavy lifting to get this information in there. But, the entire company knows about this. And they know why it is important."

Once an account is graded by Big Health, it is assigned a grade. Currently, those grades range from A+ to D accounts. The higher the grade, the more attention Big Health put to working those accounts.

For example, if an account has an A+ grade, the company gives its BDRs more time to personalize to the individual. And, they offering higher-value marketing offers. Accounts with lower grades get more traditional outbound – what Radocchia calls outbound "at scale."

That segmentation is paying dividends for them. According to Radocchia, Big Health is able to get a

qualified meeting with 73% of its A+ accounts.
"There is pretty much a linear relationship between the grade on the account, and how likely we are to get a meeting with them. That told us that our account grading is a good indicator if someone is willing to spend time with us," says Radocchia.
"And, as a result, we spend more time and effort into those accounts"

Micro-events...and the direct mail renaissance

Of course, outbound sales isn't the only method of outreach Big Health engages in (might as well take full advantage of those skilled marketing and partnerships people, right?). Two particularly effective initiatives Big Health runs are direct mail, and hosting mini-events, educational events for both current clients and prospects.
Big Health's direct mail program started about 4 years ago, when the company started mailing a copy of Scientific American magazine, with a feature about the importance of sleep, to its prospects.
They started small, with about 100 copies, and made sure not to be too "sales-y," as Radocchia puts it. It was a simple envelope with a magazine and a handwritten note mentioning how important sleep is.
And, sure enough, they got a response.
Since, Big Health has evolved the direct mail program – they have added more designed marketing collateral, as well as more automated processes like printed labels on the front. But, the handwritten note has remained because forging a human connection is the centerpiece of a project like this.
People love getting stuff in the mail. They just want that stuff to come from other people, says Radocchia.
"We wanted to make sure we are providing something of value, and why this is an important area to consider for companies. Sleep solutions are new, and we're building the market. So, we need to educate," says Radocchia.

> *"We wanted to humanize ourselves. We are passionate about this space, and that was the thinking behind. We're passionate, and we want to be humans."*

These days, Big Health is sending about 200 direct mail packages out per month, with a killer response rate of between 30% – 40% (a 2x – 3x increase over their typical outbound outreach).

***"In one case, our BDR hadn't called back as yet, but we had a prospect call us and let us know how excited they were to get the mailer,"* adds Radocchia.**

"Which is awesome, we are banging our heads against the wall to get in touch, and then they call us."

As for their mini-events, Big Health invites select clients and prospects to dinners across the United States, typically times around industry conferences. At these dinners, they also invite a sleep or wellness expert to facilitate a discussion on the importance of rest.

Again, like their direct email program, these dinners aren't explicit sales events, but a chance to connect on shared topics, and for peers in the industry to discuss how they implement wellness and health programs. But that isn't to say that these dinners don't have an effect on prospects – they absolutely do. Prospects convert into opportunities 90% of the time after attending one of these events, and, anecdotally, about 50% of those opportunities are more likely to close says Radocchia.

For more Radocchia's thoughts on sales development, account segmentation, or hosting dinner meetings, check out the rest of his interview on The Predictable Revenue Podcast.

Nailing the Technical Demo With Chartio's Matt Cassel

PODCAST

For anyone (especially our loyal readers and listeners!) that has ever been involved in a software sales cycle, the delicate and nuanced nature of this professional has surely not gone unnoticed. The need to be consultative, but firm. Flexible, but focused. And – most of all – both business and tech savvy.

Never is this skills dichotomy more true than in a technical sales environment. It's one thing to know how to sell, and another to make sure you know exactly what your product does and how it helps your customers.

For Matt Cassel, Account Executive at San Francisco's Chartio, illustrating that flexibility begins with understanding what type of buyer he is speaking with. For example, Chartio sells intricate business intelligence software, applicable both to business and technical users.

As a result, he has to be comfortable describing Chartio's value to those in both marketing and IT departments.

"For a demo or high-level overview of Chatio, I actually like to give people two paths. If they are a technical buyer, I ask them if they would like to start with connecting data sources, and then get into chart building and dashboarding.

That is an afterthought sometimes. Technical people are so focused on getting a product to connect to their data sources, they don't even think of the finished product," says Cassel, on a recent edition of The Predictable Revenue Podcast.

> *"If they are more of a business person, I start with dashboarding, maybe get into chart building. I don't really touch the data sources. But, I always ask them what they want to see and learn what aligns most with what they want to get out the call."*

Simply put: for technical buyers, front load the technical stuff. For business buyers, show them what their data looks like.

Getting Specific

It's from that high-level perch that Cassel can begin to get into the specific requirements – critical details in technical sales – that his customers need. So, throughout the initial demo, Cassel says he works to extract precise needs and requirements to ensure Chartio is a good fit for the people he is speaking to.

The trouble, however, when you're selling a technical product is there are so many applications that it can be used for. And, it can be hard to pin down exactly what the person you're speaking with wants to use the product for because they might not yet know.

For example, they may be generally interested in a company-wide analytics. But, that doesn't answer the specifics of what each team in the company would need for their tailored analytics. On the other hand, if customer asks to see specific reporting option for marketing, then Cassel can drill down on that.

Another excellent angle of extracting key information for Chartio is asking about specific data sources, then showing how to connect to it. This shows the software in action and helps avoid a rudderless feature-heavy demo (simply running through every feature of your software will not help you stand out from the crowd).

"Demoing in the product tends to work because when you are dealing with data, it can be very messy," says Cassel.

"And, it is a certain kind of messiness that you are not going to qualify out until someone is actually testing it against their live data."

Another benefit of gleaning in-depth info

from technical buyers is that that data will allow Cassel to determine if Chartio can help them at all. Disqualifying prospects is a powerful option for all companies, but in the realm of technical selling, understanding who you can't help is critical. For instance, forcing a technical sale will only create headaches for customer success and products teams with out-of-scope feature requests.

***"If it a use case that we can't help with, we qualify them out,"* says Cassel.**

"We're in a competitive space, so there are options. So, if Chartio is not the right fit we're happy to tell them we can't help them and point them in the right direction."

Helping the Sales Engineer

A defining feature of the technical sales cycle is the presence of the sales engineer. Different companies may choose to include a sales engineer at different points of the sales process – some earlier, some later, depending on what the customer needs.

At Chartio the sale engineer joins the sales process during the technical working session (the meeting after the initial demo). During the technical working session, the role of the sales engineer is to answer any technical questions the Account Executive isn't able to. That could mean answering detailed integration questions or discussing specific metrics from the customer's database.

But, there are pitfalls to the elevated technical nature of these calls as well. For instance, a customer with numerous detailed questions, or questions that require lengthy answers or demonstrations, can derail the call for any participants that aren't as technically proficient. When that's the case – or, pre-emptively, when that's considered a threat – it's up to the Account Executive to keep the call moving forward.

"The salesperson should know when not to speak, but navigate the conversation tastefully for the sales engineer can help," says Cassel.

"For example, it's easy on these calls to go down technical

Matt Cassel.
Account Executive
at San Francisco's
Chartio

rabbit holes. But, there may be a lot of people on the call that could get confused from that sort of discussion. So, the AE can be a lot of help in navigating that, and maybe offering to set up a time where that deep technical discussion can be had with the parties that need to know."

Common Mistakes

The flip-side to keeping a technical call focused, of course, is not paying close enough attention and leaving the sales engineer to stickhandle the entire technical working session.

For Account Executives, it really isn't just kicking off the meeting then,. Coming back at the end of the call to help determine next steps," says Cassel.

"The salesperson should know when not to speak, but navigate the conversation tastefully for the sales engineer can help."

It's also important for salespeople to remember to share social proof when necessary. As the sales engineer continuously weaves technical support, it is incumbent on the AE to remind everyone on the call of the business case the software solves. That might include sharing the success of other relevant clients, or determining if follow up calls need to be scheduled.

"In general, AEs interrupt unnecessarily. If you are interrupting without adding value, or stop paying close attention, that doesn't help," adds Cassel.

"Make sure everyone's time is being used appropriately. AEs are the defenders of their sales engineer's time. But remember, to drive the sales process, it is the salesperson's job."

For more on Matt Cassel's technical sales experience and best practices, check out his recent edition of The Predictable Revenue Podcast.

How Cirrus Insights Co-Founder Brandon Bruce Still Finds Ways to Support His Sales Team After 7 Years

PODCAST

Over the lifespan of a company, whether it be slow and steady climb or the lightning quick rocket ship ride of a unicorn, the role of the founder will invariably change.

At first, they do it all – marketing, sales, and customer success, for instance. From soup to nuts, the founder is the person executing on every last responsibility. If they're good and, naturally, a bit lucky, their company will grow and others will come onboard to handle different roles and train subsequent hires on the ins and outs of the job.
It's a beautiful thing, when it happens.
But although the new (and often amazing) people that join a team absorb the crushing workload initially shouldered by a founder, it's up to that leader to evolve their role, and continually find ways to support their team.

Of course, that evolution is easier said than done.

When you're used to doing everything, having your hand in every decision and every deal, how do you let go?

What does this evolution actually look like?

"So, the question always is: as a co-founder, do I still sell? Am I still involved in sales? The answer is yes, and yes. I think that leadership should always be involved in sales. So, part of my role is sharing

Brandon Bruce.
Co-Founder and Chief Operating Officer at Cirrus Insight

the good news of Cirrus Insight on blog posts and podcasts," says Brandon Bruce, Co-Founder and Chief Operating Officer at Cirrus Insight, on a recent edition of The Predictable Revenue Podcast.

> *"Hopefully, from that sharing piece, they engage. So, there is a prospecting element to my job. And once there is engagement, I support. I don't lead, for instance, the product demo, or negotiation, or security review, or legal review. But, I will be there to support sales, customer success, engineering – whoever is involved. So, from a high level there is a few things where I can add value by doing simple things. One of them is simply showing up."*

Supporting security needs

If you're doing business in the European Union, or have clients that do business in the European Union, you've likely been wading through the new General Data Protection Regulation (GDPR) legislation put in place earlier this year.

(**Editor's note:** in early June, we covered GDPR extensively. Check out our podcast on the legislation **here,** and a guest post from digital privacy expert Daniel Barber **here.**)

At the moment, the sweeping privacy legislation has ramifications only in the EU. But companies across the world have taken notice, and many believe it is only a matter of time before new, and more strict, privacy laws appear in other jurisdictions. As such, Bruce has been fielding questions from both clients and prospects about the GDPR framework, and whether or not Cirrus Insight is compliant.
As is the case with any nuanced legislation, the devil's in the details. And, as challenging as that can be, not knowing those details when called upon by a prospect can derail a sale. So, Bruce helps ensure everyone, customers and his own team, are kept up to date.

***"My role in this regard has been to get our ducks in a row, and be ready for GDPR. That can be preparing and presenting addendums etc. about what data we are processing and collecting,"* says Bruce.**

"We have gotten a lot of requests for information on GDPR, and we have tried to get ahead by getting that information out there. Compliance, risk mitigation, risk management – people are really paying attention to all of these factors. Sales is hard, the last thing you want to do is handicap them by not being ready for GDPR requirements. We need to anticipate that need, and be quick to respond."

Legal reviews, a hallmark of the sales cycle, are another avenue of support Bruce provides. For example, if a prospect's legal team – typically from a large company – suggests changes to Cirrus Insight's Terms of Service, or demands using a contract they created in-house, it's Bruce that reviews all of those proposed alterations.
That could mean simple adjustments such as font size, or deal-breaking requests such as a "termination for convenience" clause, in which a prospect stipulates they can walk away from a contract whenever they wish.
"That, in my opinion, is not okay. You can't just walk if you want to walk," says Bruce, a law school graduate.
"In that sense, it's not okay to have that in the deal. After all the work such as a pilot, and customizations, that's not a good start to a productive, long-term relationship."

Handling procurement's needs

As every seasoned sales rep will attest, navigating the procurement minefield is a must for most enterprise level deals. Unfortunately, the goal of a sales team and the goal of a procurement department are often at odds – procurement wants to pay

as little as possible, while sales would prefer a prospect pay top dollar.
These opposite agendas can be a challenge, and also kill a deal if not handled appropriately. This is where Bruce's experience handling all of those early deals on his own proves invaluable. He's dealt with procurement, knows their language, and understands when to bend, and when to stand firm.

"Although, I love the folks that work in procurement, I have called them the anti-sales in the past. So, it is helpful in those situations, when more people are being brought to the table, that I can help in being an extra warm body," says Bruce.

"I've dealt with procurement, and can share what I've heard in past. You have to know where to negotiate, where to hold firm, and how to proceed along the deal."

A bit of advice

Having a C-level executive jump in a deal, at any point along the cycle, is a critical pillar of support to lean on. And it demonstrates to prospects that the company takes the deal seriously, and wants it to work for everyone involved. But, help goes both ways. Reps, adds Bruce, should feel comfortable to approach executives early on, describe the deal they are navigating, and ask for advice ahead of time.
Being prepared for anything that could come up – whether it be legal requirements, legislative effects, or procurement demands – will keep a deal on track.
Sharing their wealth of knowledge also keeps founders engaged, and on the frontlines. Remember, as those new team members come onboard, they start taking over (and making their own) many of the founder's previous responsibilities. It's up to the founder, then, to find different ways to support the team.
But jumping in the eye of the storm, at least from time to time, is still a rush.

> *"Part of the fun of starting a company is building the customer relationships, being part of the deal, and getting to feel the adrenaline of the deal. It's exciting,"* says Bruce. *"I encourage founders to keep doing that, to stay in the game."*

For more on Bruce's methods and tactics for supporting his sales team, check out his full interview on a recent edition of The Predictable Revenue Podcast.

All things GDPR with DataGrail's Daniel Barber

PODCAST

If you're selling to the European Union – or plan to one day, once you conquer the United States – there's a good chance your thoughts are consumed with these four letters right now: GDPR.
What is it? Can I still prospect to the EU? Will I get in trouble? How do I protect my business?

To be fair, the implementation of GDPR (formally the General Data Protection Regulation) is a substantial change to how personal data is shared, held, and used. As a result, your fine-tuned sales and marketing teams, the departments tasked with keeping the lights on, will need to alter some of their processes. So, it's understandable if this new regulation has got you wondering (worrying?) about the changes your company will need to undergo.

But, according to Daniel Barber, CEO and Co-Founder of Bay Area-based compliance firm DataGrail, GDPR legislation shouldn't be looked at as a nuisance or a hurdle impeding your success.
GDPR is being put in place to protect people's data, and their privacy. That motive should be respected.

"GDPR does provide increased transparency for how your data is used. And that is a good thing," says Barber, on a recent edition of The Predictable Revenue Podcast.
"But, it does create some friction, and that is what we are seeing now."

The basics

Like any sizeable piece of legislation, GDPR can seem daunting. But, due to the

headline-grabbing privacy stories (cough, Facebook, cough) in the news this year, it shouldn't be a surprise. GDPR is a logical extension of the heightened expectation society has regarding how businesses treat personal data. It was only a matter of time before new policy arrived.
Under GDPR regulations, any data that can identify someone is now considered personal data, and will require a business to disclose where that data was gleaned from, and obtain consent from an individual to use it.

(For example, the title "CEO of SAP," even though it is readily available publicly, is considered personal data because it immediately identifies an individual).
Personal data now includes (amongst others examples):

- Name
- Personal and corporate info
  (email address, office address, phone number etc.)
- Employee info (title etc.)
- IP address

So, what does that mean for the boots on the ground? How does GDPR affect for your day to day?

Simply put, GDPR will change how your business communicates with prospects based in the EU, both from an inbound and outbound perspective.

Generally speaking, high volume outbound teams have used data providers such as ZoomInfo to provide them with the contact information – email address, phone number, title etc. – of the prospects they wish to sell to. Using that as a foundation, SDRs have built tailored lists, and dropped those leads into a cadence to be worked.
As mentioned above, outbound teams reaching out to prospects in the EU will now need to disclose to those leads where they obtained their personal data within 30 days, as well as ask for their consent to be sold to. That disclosure can happen via email or over the phone.

"This isn't legal advice, but I would advise you provide the disclosure in advance of putting someone in a sequence," adds Barber. *"If you don't ask in advance, you may annoy someone. So, doing that disclosure requirement upfront could help you out a lot."*

If a lead declines to be prospected to, you must remove them from your outbound cadence immediately, and ensure your marketing team removes that prospect from any marketing automation as well. That has

huge ramifications for marketing teams – your company can't try and get consent via other channels once outbound proves unsuccessful.

What's more, if a person requests that you delete their information, you must remove their data from every system in your organization. That can be a big job – DocuSign, for example, uses 200 different tools for various processes. That person's data cannot exist in any of them. An EU resident can also request that an organization make available to them every instance their data appears in their systems.

Companies have 30 days to comply with either request.

Organizations that host events or webinars can also no longer simply sell or make attendee lists available to other vendors. Hosts will have to obtain clear consent from the attendees that their information will be shared. The vendors that access that data will, again, have to disclose where they got the information from.

"So, I won't name the name, but they are a leading consulting firm in the Bay Area. They hosted an event recently that I attended. And they shared my information. So, now I am being communicated with by all vendors – there is about 10 of them sending me emails. That will get you in a lot of trouble on both sides: the vendors and the consulting firm," says Barber.

"So, the traditional method of getting a webinar list and emailing them, you will have to take extra steps there to be compliant. And, for good reason, right? I'm now getting emails from 10 different vendors because of that conference, and it is not a good experience."

Data providers

Just as sales and marketing teams are expected to be compliant and gain consent when needed, according to **GDPR rules,** so too are data providers. And, thus far, that is proving difficult.

ZoomInfo, amongst the most well-known data providers, stopped maintaining its EU data set as of May 4. That's because it was sourcing contact information from people's email signatures, via their inbox. Extracting data using that method is not compliant with **GDPR** regulations.

And Barber suspects other data providers will soon follow suit.

"This is something we should expect to see from other data providers in the EU," says Barber.

"That is largely because that the expectation is that those providers must explicitly provide where that information was collected from. That will be extremely challenging for them to provide that information in an explicit fashion."

That said, outbound teams can continue to access ZoomInfo's EU contacts. However, they must accept full legal responsibility for using that data and, if penalized, pay the substantial penalty that comes with it.

"ZoomInfo is just not maintaining their EU database. So, you can still use it. That is possible," says Barber.

"But doing so comes with a huge caveat: The fines and penalties for non compliance are up to 4% of revenue or $20 million, whichever is greater. That is probably something people would not like to see."

Legitimate interest

This is a grey area in GDPR legislation. The concept of legitimate interest revolves around a salesperson's ability to reach out to a prospect if the prospect has indicated on a public forum that they are looking for a good or service the salesperson provides. For instance, you frequent procurement boards and groups because you sell procurement software. And, sure enough, you read a post from a procurement officer saying they're in the market for new software. This would qualify as a legitimate business interest. Unfortunately, says Barber, **GDPR legislation** isn't clear, yet, on how it plans to handle such a situation.

Daniel Barber.
CEO and Co-Founder of Bay Area-based compliance firm DataGrail.

There will be a *"balancing test,"* that, when drafted, will determine whether a sales-person is working within accepted parameters if they use that information to sell to you.

> *"That is an area I can't provide context to yet. We don't have it from the regulation,"* says Barber.
> *"That specific point around the balancing test, has not been clearly stated by current regulators. That will provide clear information on that kind of situation. The idea is that you will be able to contact them."*

Social media

Thus far, we've discussed outbound prospecting only in terms of emails and phone calls. Of course, modern prospecting involves a host of different ways to reach out to leads. One particularly popular method is leveraging social media to connect with prospects.

Outbound teams routinely use LinkedIn InMails to send messages to people they aren't connected with. In that case, Barber says, you should consult LinkedIn's terms of service before proceeding. Twitter, on the other hand, requires someone to follow you back before you can send a direct message. That relationship may satisfy the basis for legitimate interest.

Both Twitter and Linkedin have recently updated their terms of service recently (as you may have noticed).

"I would imagine that there will be increased pressure on LinkedIn to update their terms of service again, as people move to LinkedIn because they can't call or send over email," says Barber.
"That will cause it's own problems."

For more on Barber's best practices for correctly navigating GDPR, check out his recent chat on The Predictable Revenue Podcast.

Octiv's Kelsey Briggs On How To Improve Those Critical Documents

PODCAST

Kelsey Briggs.
Engagement manager at Octiv.

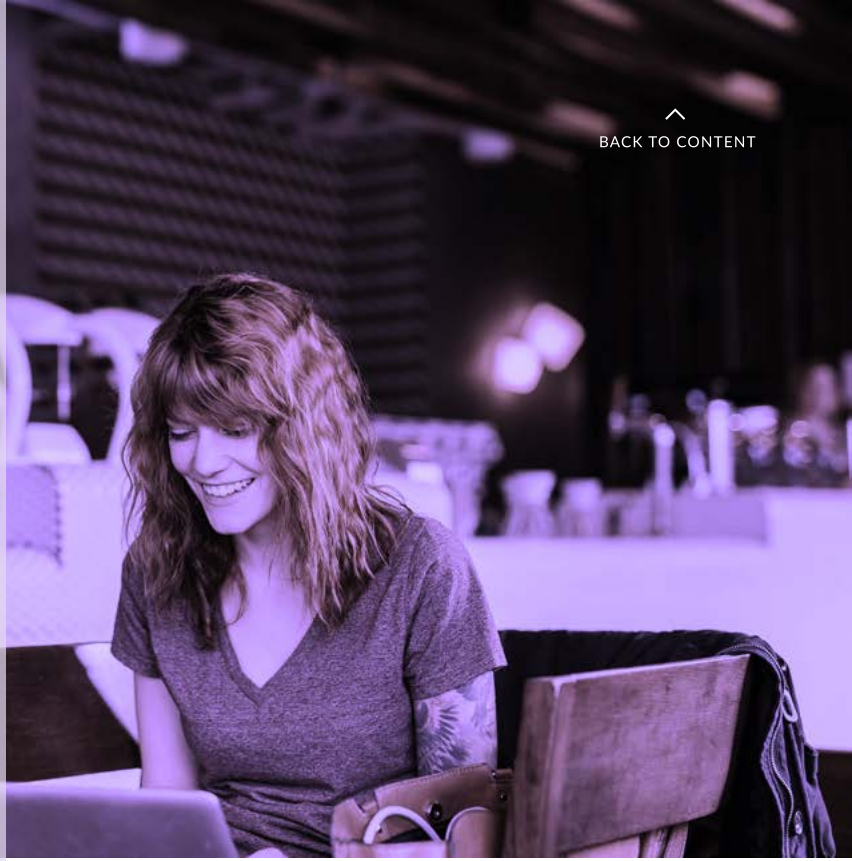
Sales reps, regardless of their seniority or the product or service they sell, juggle many responsibilities as part of their day-to-day. Emails, calls, presentations, follow-up meetings, negotiations – there is no shortage of activities available to fill the day.

That said, as a sales rep marches his or her way towards closing a deal (without a doubt, their most important responsibility), there is one important stage no salesperson can avoid: producing, and sending, a proposal.

Sure, getting to the proposal stage is a positive – you're one step closer to bringing in some revenue! – it can be a challenging, time consuming task.

Does your sales org keep track of the content needed for proposals, and make them available in a centralized place? If not, where is that critical content kept? And, are there any guidelines for how to best draft a proposal? What does a (hopefully) winning proposal look like? All essential questions, to be sure.

And according to Kelsey Briggs, engagement manager at Octiv, an Indianapolis-based software company working to streamline document workflows such as proposals, many companies are struggling with these issues.



"The first mistake we often see is that people don't have an established proposal process. Sales reps are often asking about what templates they should use, and where those templates are saved. Often, we are finding that those documents are just saved on sales reps' desktops," says Briggs, on a recent edition of The Predictable Revenue Podcast.

"When that is the case, we recommend companies use one master document for proposal templates, so everyone has the exact same terms and conditions and branding. We also suggest companies bring together a library so reps have content when they need it. You don't want people just copying and pasting stuff from previous proposals. That content could be out of date."

Why You Should Take Your Proposal Process Seriously

As mentioned above, proposals are a key component of any sales process. And, like any sales process, adds Briggs, there are likely efficiencies you can find in that process, if you take the time to audit it.

For instance, the faster you can turnaround a proposal, the better chance you have a closing the deal.

"The average seller takes 3 days to turnaround a proposal. But, the most efficient sells take less than a day," **says Briggs.** *"That metric is pretty meaningful, we think, because 35-50% of sales go to the seller that responds the quickest."*

Once a proposal is submitted, how quickly a deal closes depends on the deal size.

For deals less than $10,000, the time to close after delivering a proposal is 11 days. For deals between $10,000 and $50,000, deals close within 19 days, post-proposal. Finally, deals over $50 take 30 days to close.

Interestingly, most prospects (75%) agree that sales content such as proposals are extremely important is making buying decisions. But, in contrast, prospects spend only two minutes and fifteen seconds reviewing those proposals.

"So, content is really important, but they don't spend a ton of time reviewing it," says Briggs.

"So, we need to get in front of them and impress them."

What To Include in a Sales Proposal

According to Briggs, proposals can (and should) vary from company to company, and from vertical to vertical. But, on the whole, proposals should contain some form of these six sections:

1. COVER LETTER: this page gets the most view time (almost 10X than any other page in the document). As such, it should be considered first page of the proposal. Briggs says don't skimp on time, craft a message and put it on. Give your prospects something to take away from the cover letter – offer solutions / benefits, for instance. Finally, provide what you want the next step to be (call? Follow up meeting? Close?) and avoid putting any mention of price on this page.

2. WHY? (Alternate title – Why Should You Buy?). This page should focus only on why you are uniquely positioned in the marketplace.

3. CASE STUDIES / TESTIMONIALS: display your credibility and the results you've achieved with other customers. You can also provide a link to G2 Crowd as well, so you prospects can read reviews of your product.

4. PRICING AND PROPOSAL DETAILS: make this as straightforward as possible with full transparency into pricing / packages, says Briggs. If you need to add project scope or deliverable of timelines, include it on this page.

5. TERMS AND CONDITIONS: if proposals are a method to close deals, then include your terms and conditions.

6. CLOSING CALL TO ACTION: what are the next steps you want? To sign? A final meeting? A meeting with other executives / team members? Be clear and put it in the proposal. If you want them to close, include e-signature option.

As for the length of the pages: the shorter the better, adds Briggs. And, the entire proposal should be about 5 pages long, as that length will force you to select only the best information.

Best Day to Send a Proposal

So, you've designed your proposal. And it's killer. When should you send it, then, to make sure your first in line and you get every second of your prospect's attention? Sadly, there isn't.

Briggs says she has yet to see any trend in proposal delivery days. That said, she has seen an uptick in prospect's reviewing proposals on weekends or after hours. In those cases, the proposals are being read on tablets or mobile phones.

During office hours, however, proposals are overwhelmingly being consumed on desktops.

"When is the best time? The sooner the better," says Briggs.

"The best time to send a proposal is when your customer is ready for it."

For more on Brigg's best practices on sales proposals, check out her recent edition of The Predictable Revenue Podcast.

ProfitWell's Patrick Campbell on the nuances of pricing and why salespeople aren't more involved

PODCAST

From a distance, determining the price of a good or service appears to be one of the easier responsibilities in the evolution of a company.

I mean, narrowing down pricing isn't as involved a task as actually building an app or navigating numerous, and often treacherous, sales cycles. Right?

Wrong.

Despite appearances, establishing pricing is a fluid, nuanced practice that has significant effects on a company's well being.

For instance, growth, retention, and your market's perception of your company are all related to the price (or prices) you decide to charge.

As such, this is a decision that requires research, input from different departments, and, most importantly, a thorough understanding of the personas you sell to.

"Not a lot of people think about its pricing – not just in sales, but companies as a whole. It's viewed as this monolithic thing that needs to be solved," says Patrick Campbell, CEO of ProfitWell, on a recent edition of The Predictable Revenue Podcast.

"But what we found is that pricing is a high-impact feature of growth."

Persona pricing fit in a crowded marketplace

As companies continue to build (and market) new software platforms, the need for

those companies to differentiate themselves from the pack becomes more and more important. Response to that competition has, Campbell says, forced the relative value of features and products down. For example, a Salesforce integration that a company used to be able to charge $1,000 for is now table stakes if they want to close a deal. This proliferation of features – and the expectation that they are offered for free, or as cheap as possible – has refined the skills of sales and marketing teams. You need to be good at acquisition to survive these days, full stop.

An important tool in the acquisition toolbox is pricing. In fact, pricing is accelerating in its impact on a business, in particular, when it comes to both closing and retention. But, stresses Campbell, pricing must resonate with the personas you sell to for it to achieve its optimal effect.

"It doesn't matter what you're selling – SaaS software, a cup of coffee, or a giant tractor. Everything you are doing is driving a customer to your product or service, or justifying your pricing. That goes for sales and marketing, product, development, and manufacturing," says Campbell.

"You need to understand who is a good customer, and who is a bad customer. Because once you do, you align that funnel and have sales cycles that are so much easier. Of course, there are exceptions, but once you have that fit the machine starts to work really well. And you can align your pricing to the personas you attract for acquisition and retention."

Understanding those personas

When determining the personas best suited for your product or service, it's easy to assume your ideal market is larger than it is. Who doesn't want to sell to the largest group possible? But, says Campbell, it's best to start with a few personas at first. You want to nail down one, and then grow that one cohort in size.

For example, if you decide you are selling to salespeople, you want to break that group down into small, medium, and large salespeople, and then determine what each respective group needs.

Patrick Campbell.
CEO of ProfitWell

To find that information out, you'll want to talk to each of these groups individually, in dedicated product interviews.
"The bottom line is you want to find out what features they like vs. what features they need. And, you want to ask them about their willingness to pay for those features," says Campbell.
"Ask them 'at what point would this feature of product be way too expensive for you? Or, 'what price would get you to sign the contract today?"

Value metrics

Once you've gleaned that critical data from the personas you've chosen to focus on, it's time to determine your value metric. According to Campbell, a value metric is how you charge your customers: either per user, per dollar saved, or a flat fee per month, for instance.
"If you get your value metric right, if your customer sees the value in the same way you do, then there is no reason for your customers to churn," says Campbell.
"Nailing your value metrics also allows you to get users at different sizes. For example, 5 seats at Salesforce, for a company that only needs 5 seats, doesn't seem expensive at all. And, 500 seats at a huge organization, on the other hand, is just the cost of doing business. Salesforce is able to capture both of those groups."

There are three main elements of a value metric:

It has to be as easy to understand as your sales process (if your company has no salespeople, then it has to be simple. If you have a seven-call sales cycle, then it can be more complicated)
It should grow with your customers' usage of your product (as they use it more, they should be paying you more)
It needs to mirror where the customer sees value in your product (if they don't

see value in a per-user cost, for instance, don't charge per user)
"Of course, you can always choose against these metrics, but if you do it is more of an uphill climb you are embarking on," adds Campbell.

Why salespeople aren't more involved in pricing

Finally, the people determining pricing, and its associated value metric, should be a cross-functional committee, with representatives from marketing, product, and the executive team.
Sales too, should be part of such a committee, but the role of sales in pricing decisions has been diminished over time. That seems counterintuitive, as salespeople are the ones having pricing discussions with prospects each day.
But, Campbell says, salespeople haven't historically been open to pricing changes – even when those changes are to the benefit of the company as a whole. Price changes, salespeople often argue, make it harder to close deals.

> ***"It's never been easier to be a salesperson. Yes, it's not perfect, there are always difficult leads, but there hasn't been a good forcing function to make salespeople better salespeople,"* says Campbell.**
> *"If you increase your prices, sales may need to understand that the company will alter how it does sales to better reflect a higher touch sales cycle, for instance. A salesperson should always be open to matching the price to where the value is, because then you won't be taking bad leads and forcing them into a bad sales model."*

For more Campbell's thoughts on pricing, including some tips on how to incorporate effective persona-based pricing strategies in a sales call, and the effect a price change can have on company's bottom line, check out the rest of his interview on The Predictable Revenue Podcast.

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How Andres Muguira uses Predictable Revenue methodologies

to improve the performance of his Marketing and Customer Success departments

PODCAST

Full disclosure: we're big fans of Predictable Revenue.

I know, I know... this is probably coming as a surprise. But, it's true. The system works; the methodologies laid out in the book help companies, large and small, make money. We've seen it countless times – and it's awesome.

But every now and then, we connect with a sales leader that teaches us a thing or two, and shows us how they are evolving the Predictable Revenue system and growing their teams at jaw-dropping rates.

"I love Henry Ford, in particular, how he revolutionized the factory line by dividing different processes," says Andres Muguira, Managing Director of QuestionPro Latin America, on recent edition of The Predictable Revenue Podcast.
"So, when I read Predictable Revenue it was an instant connection. I loved how Aaron [Ross] described the different specialized positions in sales. After reading it, I started applying a lot of the methodologies and and I've been able to grow my business 50% year over year."

Predictable Revenue for Marketing

More often than not, we associate rapid rapid growth with high-performing sales teams. And, generally speaking, that connection is correct – the more sales closes, the more money the company has in its coffers. But leads have to come from somewhere, and instead of focusing entirely on outbound sales (the expected target for Predictable Revenue methodologies), Muguira turned to marketing.

In particular, he thought using SDRs to consistently prospect to related companies, influencers, and associated publications to establish content partnerships would yield an avalanche of inbound leads.

He was right.

In two short years, Muguira's marketing team has helped produce 30 webinars, 300 backlinks (shared content), and established the company amongst the top search results for 180 specific keywords. Oh, and they're also bringing in between 3,000 – 3,500 leads per month.

"Before sales, I was a digital marketer. So, it made sense for me to apply these techniques to marketing. And, it worked to get great our content on other sites, or establish webinars, for example. My thought was that it was like a sale, but easier because we didn't have to get any money from who we were talking to," he says.
"The impact has been tremendous. We've seen immense growth."

Predictable Revenue for Customer Success

Muguira had routinely tried to increase revenue from renewals, but could never get the results he wanted. So he thought: why not bring devoted, sales-focused positions to customer success?

To incorporate those new roles, he split the customer success department into two main divisions – Account Executives (sales), and technical roles, similar to Solutions Engineers. The Account Executives would interact with all the customers, receive any complaints, build rapport, and pitch renewals or upsells. The technical positions, on the hand, would actually diagnose and fix the technical issues.

> ***"I tried for a year to have high-level technical people solving problems, as well as trying to upsell or renew customers. So, I thought, if I need both SDRs and AEs in sales, maybe I need both technical people and closers,"*** says Muguira.
> *"The people that should be in contact with our current clients, should have a sales background. And the technical people, who don't always want to face clients, can make the technical decisions."*

Outbound

You didn't think we'd forget about outbound, did you? With the success Muguira had implementing Predictable Revenue Methodologies to other departments at QuestionPro Latin America, it was only a matter of time before he established an outbound team.

But because inbound had been so successful, Muguira was able to stagger the growth of his outbound team by first testing the waters on small deals to prove it could work, then expanding the team and having them focus solely on big ticket accounts.

"I did outbound recently, for a couple months, closing strictly $900 deals. And it was working. I feel like starting with smaller deals helped me believe in outbound," says Muguira.

"Those early closes motivated me – I knew this worked. And it would work for larger accounts."

Muguira's experiment with smaller accounts is an interesting counterpoint to what many new outbound teams tend to focus on. Because outbound is expensive – sales reps, tools, and data subscriptions all cost money – outbound teams often chase bigger deals to prove the investment made in them was worth it.

But, bigger deals take time. And so does ramping up a new outbound team. So, if a new outbound team goes after larger deals straight away, it could be months, even up to a year, before the deals start coming in. Starting with smaller deals, however, could yield results immediately.

"We went after the smaller deals – we learned, we gained confidence, and then went for the bigger fish," says Muguira.

> *"Over time our average deal sizes have gone up."*
>
> FROM THOSE HUMBLE, $900-DEAL BEGINNINGS, MUGUIRA SAYS HE NOW HAS HIS OUTBOUND REPS FOCUS ON DEALS BETWEEN $20,000 – $50,000.
>
> *"We are going after whales."*

Growing the team

To support this kind of rapid growth, Muguira has had to expand his team dramatically over the past few years. Just three years ago, the team was just one person. Two years ago they had grown to 12, last year they jumped to 22, before doubling to 44, where they sit now.

Of the 44 team members, 17 are in sales and customer

Andres Muguira.
Managing Director
of QuestionPro Latin
America

success, and 7 more are in marketing. The remainder of the team is spread across HR and other operational roles.

"In Latin America, it's still really early stage in regards to SaaS companies, so it's been a huge accomplishment to be able to grow that much," says Muguira.

And he's right – that's a lot of new jobs. But with the consistent expansion of the company, Muguira expects more hires to come. More sales, more marketing, more customer success professionals, all will be needed. And each of them, regardless of what department they work in, will get a crash course in Predictable Revenue. After all, it's how QuestionPro Latin America grows.

"If I hadn't read Predictable Revenue, I would not have been able to grow the team or this company at this speed," says Muguira.

For more on how Muguira has evolved Predictable Revenue to grow QuestionPro Latin America, check out his recent edition of the Predictable Revenue Podcast.

From Telemarketing to a Seat at the Executive Table: The Evolution of the SDR With SalesSource's Lars Nilsson

PODCAST

In the seemingly ever-expanding world of startups and tech sales, it's hard to envision a time before the critical (and esteemed!) role of Sales Development Representative had become a must-have in every sales org.

Today, a quick look at any – any – startup hiring for sales roles will yield at least one opening for an SDR. But it hasn't always been that way.

In fact, sales development, as we've come to know and love it, is a relatively new role. When Lars Nilsson, CEO of Bay Area sales consultancy SalesSource was building a team of development reps at Portal Software in 1997, they were considering telemarketers by the company.

Mind you, they were executing sales development tasks – qualifying inbound leads and doing some cold outreach on behalf of the company's quota carrying reps. It's just that Portal Software didn't have a better name yet.

That is, not until Nilsson's team members renamed themselves.

"My team felt the name "telemarketers" wasn't right. So we whiteboarded, over pizza and some drinks, a number of different names. And we settled on Account Development Representatives," says Nilsson, on a recent edition of The Predictable Revenue Podcast.

"It felt great to have a name that better reflected what we were doing for the quota carrying reps. And, I've been iterating on the ADR / SDR model for 20 years now."

What's in a name?

In addition to Account Development Representative, this job has enjoyed a number of other similar titles: Business Development Representative, lead Development Representative and, of course, the now ubiquitous Sales Development Representative.

But regardless of what you call the gig, Nilsson says it is instructive to have a clear-cut definition of the role in order to understand how it supports the sales team, and the company as a whole.

> ***"Really, it's a non-discrete quota carrying role, that has been put in to either manage inbound leads, or to generate the colder outbound motion,"*** says Nilsson.
> *"But, it's done in a controlled way – for target personas, at target accounts."*

The importance of the SDR

When a company is just getting off the ground, its sales team, however large, is on the hunt for any customers that will give them money. And, according to Nilsson, a startup can operate like that for a while. At that point, any logos that can go up on the website are a big help.

But at some point, adds Nilsson, you have to start looking at fundamental sales concepts such as Total Addressable Market and Ideal Customer Profiles more closely, as well as structuring your sales development team so your reps aren't juggling both inbound and outbound leads at the same time.

It's time to start growing in a more strategic, and scalable fashion.

Fostering a culture of mentorship and communication

More so than any other role in a company, SDRs are on the front lines of any company's growth, and, as a result, are engaging with a significant volume of prospects each day. To help with what can often be heavy workload, numerous sales enablement tools have been developed, promising everything from delivering personalized emails at scale to AI-assisted prospecting.

Many of those tools are great, says Nilsson, but before we start collectively preparing for AI to take over the world of sales, we should cultivate a culture of mentorship and open communication to help SDRs grow in their careers.

"I think good old fashioned mentorship works. I expect AEs to mentor a young salesperson. They understand what the younger reps are going through. They can help them on their calls, for instance. That's where the best management and coaching happens," says Nilsson.

"Of course, some AEs don't do this. They don't see the SDR as a valuable resource. But, I want AEs to care about SDRs as much as the SDR Managers do."

> *"The sooner you can get to that, the sooner you can outline the right contingency of accounts, the sooner you can start getting your message out to those right constituents,"* says Nilsson.
>
> *"At Cloudera, we spent a little too long on the new logo hunt period of our growth. Eventually, we had original customers churn, and until we took a look at why, we didn't realize that many of the customers we sold to initially didn't have the in-house knowledge or expertise to operate our software. That realization helped us understand that our TAM was actually in the Fortune 5000 companies, rather than the Fortune 10,000. That was a pretty big realization – it allowed us to focus our efforts on a smaller subset of companies and, more importantly, the personas in those."*

Clear, supportive communication isn't just the responsibility of SDRs and AEs, however. Nilsson believes both the marketing and sales departments, as a whole, need to hold regular meetings to discuss leads.
Sales and marketing are two points on the same continuum, and need to make sure they are on the same page at all times.
"I'm a fan of marketing getting in front of SDRs and asking about what worked, and what didn't. This is a huge help and will continually push the company forward," says Nilsson.
"They just need to sit together in a room, share pizza, and talk."

Lars Nilsson.
CEO and Co-Founder
Company SalesSource

Getting a seat at the table

Having a place – and a voice – amongst the executives in a company is an important venue for all departmental leaders to discuss the projects they're working on, as well as learn from other senior colleagues. Sales development leadership is no exception to this rule. It is true that sales is always included in executive-level strategy and meetings, but that representation often comes from the Account Executive world. But prospectors are critical sources of information, and should have a voice not just amongst sales leadership, but the organization as well.
"I told the CEO at Cloudera that I wanted a seat at that table. It was to listen, and learn, but also to teach others about what the SDR team will be doing. SDRs speak with people outside the company more than anyone. They know what is working, and what isn't," says Nilsson.
"That information will help the team, without a doubt. There is no reason why the sales development function should be in a side pocket somewhere."

For more on Nilsson's thoughts on the role of the SDR, as well as his chat with Aaron about prospecting best practices, check out his full interview on a recent edition of The Predictable Revenue Podcast.

Social Selling 101 With SMARTASSISTANT's Karly Neveu

PODCAST

If you've been in the trenches of sales development over the last few years, you've surely evaluated, and potentially implemented, social selling tactics into your prospecting.

Karly Neveu. Director of Inside Sales and Sales Operations at SMARTASSISTANT.

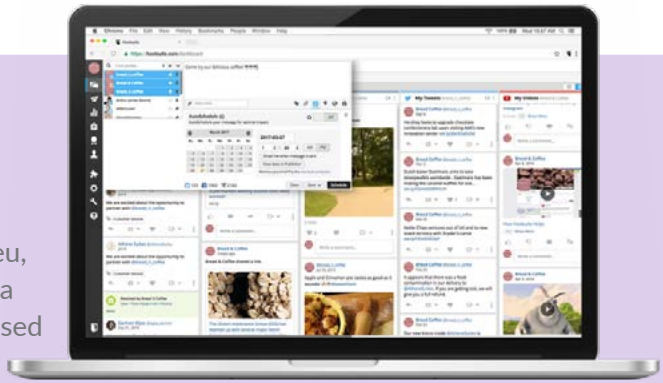
We are, after all, creatures of various (maybe all?) social media platforms. So too are businesses. Companies large and small, regardless of vertical, are active on social to better share their ever-evolving story and engage with their audiences.

But although social selling has been a top-of-mind practice for a while, it remains somewhat of a mystery for many slogging through a cadence on a day-to-day basis. Is it regularly posting on LinkedIn? Scheduling informative Tweets? Leveraging InMail's? Following the companies you sell to? All of the above?

Well, yes. Social selling involves all of those things. But, before delving into the specific ways you can execute social

selling, it's important to first look at the philosophy that governs the practice. Sure, you have to be active on social media, but effective social selling requires you to become part of the online community you sell to.
You have to listen, be relevant, and offer value with everything you do.
"It's about creating the voice for the company and the industry. With social selling, if you're only talking about yourself and what you've done, is that really of interest to the industry? I'm not sure," says Karly Neveu, Director of Inside Sales and Sales Operations at SMARTASSISTANT, on recent edition of The Predictable Revenue Podcast.

"So, I like to be more industry specific now, and share that with my team. Long term, on LinkedIn, if you have relevant industry examples, that is what I consider valuable social selling today. It has to be succinct, and relevant. But, I also still want to share things that I'm interested in as well, aside from the industry and the business."



Hootsuite

It's nearly impossible to discuss social selling and not mention Hootsuite. Neveu, prior to joining SMARTASSISTANT, was a longtime employee of the Vancouver-based unicorn. She joined the company as it's second SDR, and rose through the ranks to such roles as Account Executive, SDR Manager and Global Inside Sales Manager.
As Global Inside Sales Manager, she started and built a mid-market sales team from just two salespeople to 25 when she left.
That's tremendous growth, and reflective of just how many companies became active on social media during that time.

"What I was most proud of there was taking a couple really successful SDRs and creating that new team.I worked on that for two years. By the time I left there was 20-25 people on the team, with plans to grow indefinitely," *says Neveu.*
"We just had so much fun doing it. It was the team that put their brains together and decided what type of companies to go after."

Getting people's attention

The proliferation of corporate social profiles has given salespeople more information about their accounts than ever before. For example, a robust Twitter profile for a retailer will routinely share information on new promotions, new locations, or new products.

That intel, of course, is great fodder for an email, a LinkedIn message, or, better yet, a social post from the salesperson themselves.

It shows you know your prospect, you're doing your homework, and you're working hard to stand out from the crowd.

After all, isn't that what we're all trying to do?

"It's such a noisy world. I mean, my inbox is full of people reaching out, and their only sending emails. I know I'm just a name on a list," says Neveu.

"So, what I liked to do was follow the prospect itself, and follow the contact. So when the time was right, I could add value. For example, if we had a webinar, I could send a Tweet to invite them and include as an "at" mention. Or, if there was an event I would Tweet to them and let them know I hoped to see them there. This is different than just hounding them for a meeting."

It's also more fun, adds Neveu.

Prospecting, as well know, can be a grind.

And, for those prospects getting canned emails and aggressive requests to chat, it can be exhausting. Social selling, on the other hand, can be genuinely engaging and a refreshing addition to a cadence.

"Make it interesting for your leads. When I started at Hootsuite, I saw an email going out that had a Gordon Ramsey GIF in it. I came from wealth management, one of the most rigid industries. I was terrified," says Neveu.

"But, it works.

Real world tactics

Okay, so, we know why our team should be interested and engaged in social selling. And, we know a few of the basic requirements (get on social!) to play ball.

But, what does social selling look like on the ground? What are some of tips and tricks frontline salespeople can include in their work?

To start, get comfortable with Twitter lists. These are collections of curated accounts of prospects, grouped by their roles and industries. **For example,** when Neveu worked at Hootsuite, she often sold to colleges and universities. So, accessing a Twitter list of marketing and communication professionals in higher education is a perfect way to get leads and, most importantly, understand the issues the community is talking about.

Again, that intel is great fodder for prospecting. And armed with that information, you immediately become timely, relevant, and informed.

The good news is, you don't have to individually follow each of the people on whatever list you choose to use. And, better yet, you don't even have to put those lists together yourself (although it's very easy to do so). There are lists compiled for nearly every group you can think of and you can use any of them that apply to you.

"Go and find that list," Neveu adds. "Someone has already done all the work."

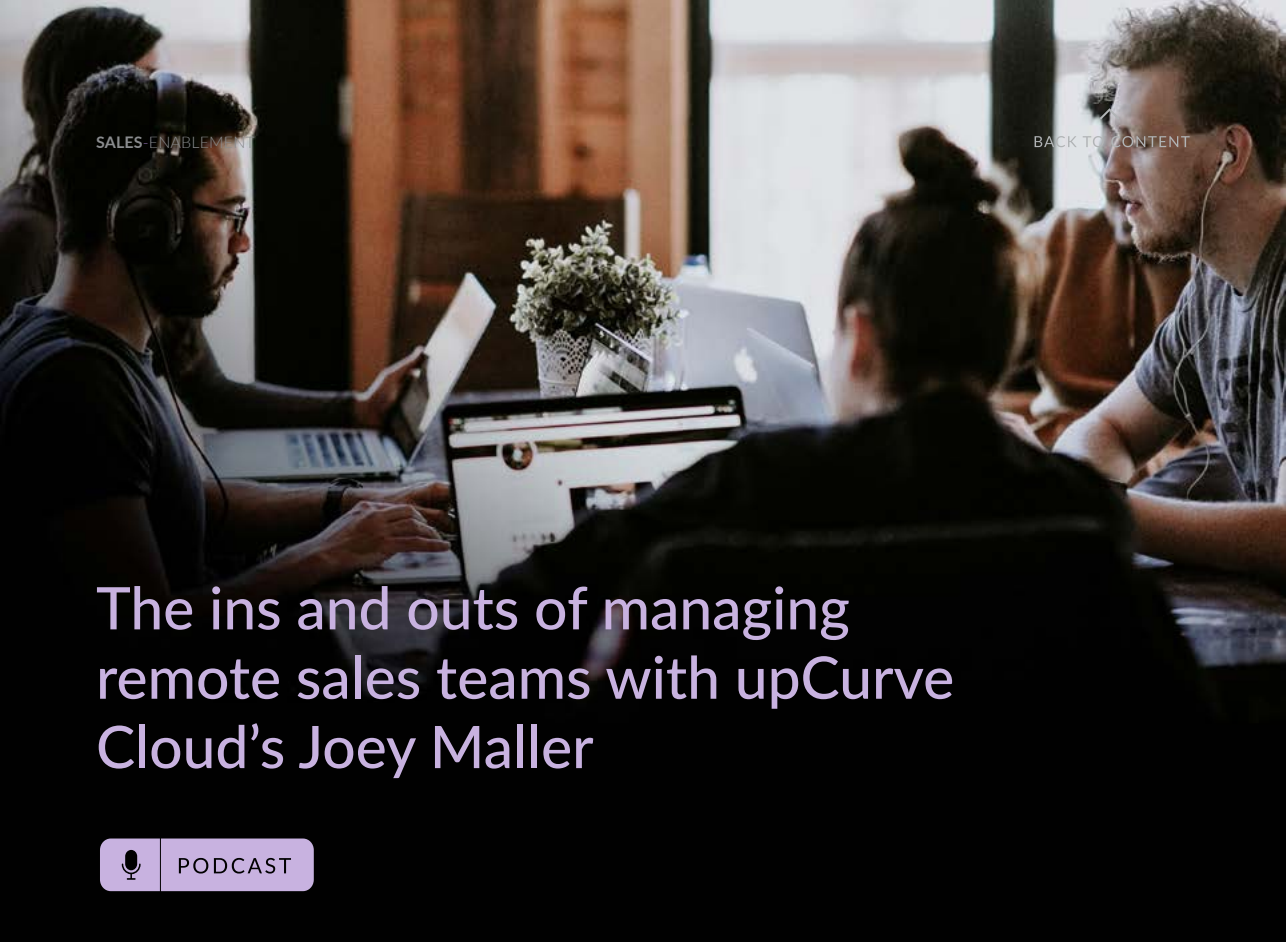
You can also use Geocoding to see what people in a certain geographic range are talking about on social. This option is great for following specific high-profile events that you can't attend in person. For instance, you could see a prospect raving about the keynote address, and you can share information with your VP of sales, who happens to be at the event.

Again, you've helped start a relevant conversation. Social has given you a window into a discussion that you would not have seen otherwise. Of course, there's no guarantee you get a deal done because you included info you gleaned from a Twitter feed.

But, you will stand out. And standing out increases your odds of getting a response. And, getting a response increases your odds of getting a deal.

And, after all, isn't that what we're all trying to do?

For more on Karly Neveu's thoughts on social selling, check out her recent edition of The Predictable Revenue Podcast.



The ins and outs of managing remote sales teams with upCurve Cloud's Joey Maller

PODCAST

In the rapidly growing world of B2B technology, the ever-evolving suite of tools available to companies has benefitted organizations (of all sizes) in myriad ways.

Increased sales, better customer service, more responsive and intuitive products – technology has truly reshaped,and continues to reshape, business.

In addition to helping companies increase their bottom line, technology has also allowed for a fundamental shift in corporate culture. For instance, we are now able to glean more nuanced (and anonymous) feedback from employees, seamlessly collaborate on projects, and have remote team members remain lockstep with the company, regardless of where they're based.

At the risk of choosing favorites, it's the latter example that really represents a seismic shift from a traditional corporate structure. In years past, it would be nearly impossible to have team members based around the country, continent, or globe and be able

to foster any kind of company culture, let alone have everyone collaborating and producing efficiently.
Yet, here we are: companies now routinely have their most important resource, their people, routinely working remotely. In fact, some companies have opted for an entirely remote workforce.
And they love it.
"If you take a step back and look at where we are with technology and communication – there are few, if any barriers left to remote work being problematic," says Joey Maller, Google Cloud Sales Manager at UpCurve Cloud, on a recent edition of The Predictable Revenue Podcast.
"If you give people the right tools to people to work from home, they are actually more productive."

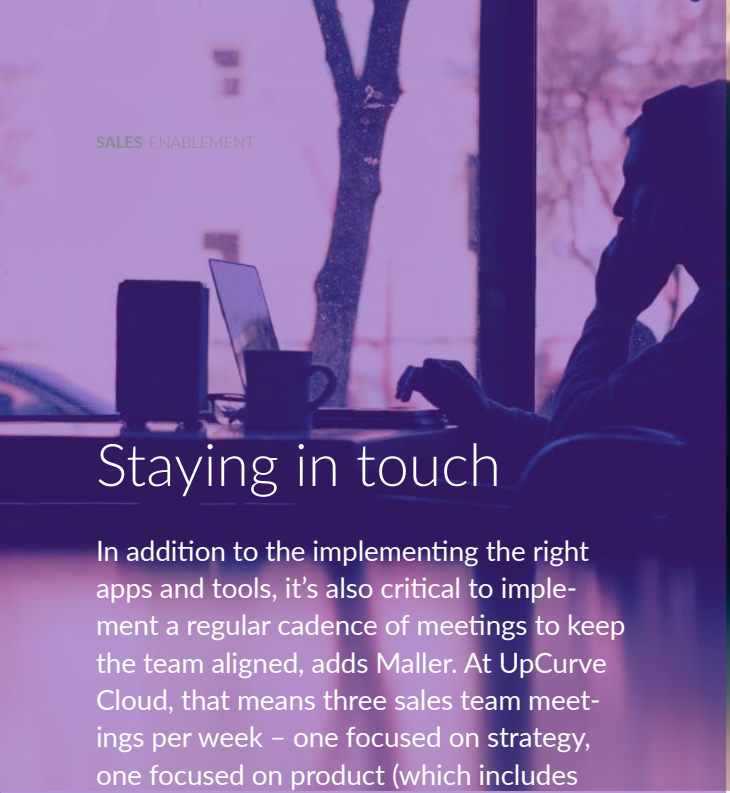
Finding the right candidates...and using the right tools

For the team at UpCurve Cloud, their march towards building a completely remote sales team started when they began interviewing highly-qualified candidates across the United States. The company was growing, and hiring the right people, they thought, meant more to the company than where those people were based (in addition to the money they thought they could save on office space).
They just needed the provide the right infrastructure.

> ***"They were just the right candidates, and we wanted to work with them. We realized in the process that it could also be cost-effective. We just needed to provide the right tools," says Maller.***
> ***"Finding the right talent was the foundation, but, as I said, we quickly realized we had to equip people with the right tools to make this work."***

Some of those tools, says Maller, are: requiring cameras to be turned on for all team meetings, internal chat tools (Google chat / hangouts, and Slack), and a suite productivity tracking apps that provide visibility into their reps' day-to-day.
"It's been said a lot, but the right pieces of technology are the key to staying in communication, in real time," says Maller.
"Whether you're on the road – wherever you are, at any point – we can send an important note."

BACK TO CONTENT



Staying in touch

In addition to the implementing the right apps and tools, it's also critical to implement a regular cadence of meetings to keep the team aligned, adds Maller. At UpCurve Cloud, that means three sales team meetings per week – one focused on strategy, one focused on product (which includes marketing), and a one-on-one with each rep individually.

With each of the meetings focused on a different topic, the company ensures that no issue falls through cracks, while providing space for a team-wide chat, an update on new tools, and a granular look at everyone's pipeline.

For the all-important feedback and coaching element of sales leadership, says Maller, he likes to provide that during each rep's weekly one-on-ones.

"Coaching really relies on trust. Technology allows me to listen, and provide coaching on calls and emails, and I make sure feedback and coaching are being used in these one-on-ones. That helps build that trust," says Maller.

"We also focus a lot on discovery notes. We expect that each rep makes detailed discover notes for each opportunity, and I review those notes. Those notes are very useful because we use them as the foundation for how to navigate new opportunities that come up. For instance, if an opportunity from the past can help a current opportunity, we will use those notes to help us."

Keeping it fun

With a team spread across the entire United States, building in a culture of fun can be a challenge. Anyone who has ever been on a sales floor knows how dynamic, and hilarious, it can be. But what do you do when you don't have a sales floor?

You run regular contests, for one.

> *"Contests, or spiffs, are huge for us. We run contests for numerous things – for the most sales, for the rep who sets up the most calls with C-level executives, or for the rep who sets up the most in-person meetings, for instance," says Maller.*

"Work has to be fun, and we make sure we do a lot of things to keep things fresh. Salespeople love competition, and that can be a great driver of fun, and get results. It helps salespeople put the pedal to the medal. For us, we offer many different kinds of prizes – TVs, a Google Home, or gift certificates. We try and get creative with the prizes, so it just giving someone an extra $1,000."

(**Editor's note:** we spoke with Zach Barney a while back about how effectively spiff your team. You can read about our in-depth chat here, or listen here).

Finally, adds Maller, the team gets together about three times per year: at sales kickoff event early in the year, a holiday party, and at the Google Next event. Every now and then, it's nice to get in the same room and connect face-to-face.

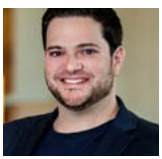
"We fly people in for those events," says Maller. *"And, being remote has helped us do that – our savings on office space, for instance, has made that possible."*

Making mistakes

Of course, there have been pitfalls along the way. Maller says the company had to refine its hiring process along the way, to ensure they were asking the right questions to their candidates.

Working remotely, he says, takes a certain kind of person, and it's important to find out if your candidate possesses those qualities, and understand what it takes to succeed when working remotely.

For example, Maller says setting yourself up at home as if you were at the office is important. That means having a dedicated office space,and sticking to a routine that mirrors one of someone that commutes into an office.



Joey Maller.
Sales Manager - Google Cloud
UpCurve Cloud

And, he adds, make sure you consider, in advance, what tools you'll need to stay connected with your team. Tools are key – Maller can't stress this enough – because without them, you're bound to miss something.

"We failed in this, especially early on. I'm in California, and we hired someone in New York, so the time difference was a barrier. By the time I came in, and started following up with the team, that person was at lunch. And, by the time my afternoon was starting, they were wrapping for the day," says Maller.

"This was before we had tools in place to measure activity. It was a challenge to know who was doing what, and who was doing everything they were asked."

For more Maller's thoughts on remote work, check out the rest of his interview on The Predictable Revenue Podcast.

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