

The Ultimate

SALES GUIDE TO KICK-START 2021



SARAH HICKS & COLLIN STEWART

INTRO ..

2020. What a year. We saw deadly wildfires sweep the beautiful nation that gave us Steve Irwin. Murder Hornets the size of small birds arrived on unsuspecting North American shores. We said goodbye to Kobe Bryant, Ruth Bader Ginsburg, and Eddie Van Halen. Oh, and we entered into a global pandemic because patient zero ate a bat.

But it wasn't all bad. Parasite cleaned up at the Oscars, making it the first non-English language movie to win Best Picture. The United States has its first female, first black, and first south-Asian Vice President-elect. And, through it all, we in the b2b business world kept our heads held high. We worked through sudden virtualization, unexpected career changes, total target market shifts (or, even worse, disappearances), and company reinventions - plodding along in what was continuously proving itself to be the most tumultuous year of many of our lives.

Despite... *motions vaguely at the whole year*, here at Predictable Revenue, we were fortunate enough to have over 50 incredible guests join Collin and Sarah on our weekly podcast. Those guests taught us invaluable lessons on prospecting, discovery, virtual sales management, product-market fit, and everything in between. And while we wish we could pack every single episode from 2020 into this ebook, you'd be scrolling until 2022, so we've compiled this ebook out of our Top 10. We want you to take advantage of all the brilliant sales leaders and practitioners we've had on the show, and leverage the actionable tactics and strategies they've shared so you can put this 2020 nonsense behind you and start 2021 off strong.

It's our Hanukkah, Kwanzaa, Christmas, Bodhi, and non-denominational end of year gift to you, and our little way of saying thank you. Thank you for watching, thank you for reading, for learning and sharing and engaging, and for being a part of the Predictable Revenue community.

> Authors: Sarah Hicks & Collin Stewart



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Section 1

PERSONALIZATION IS KEY

If there's one constant to emerge from the tumult that is 2020, it's the power of personalization. Gone are the days when you could just throw a couple of custom variables into your email template and fire off thousands of near copies to anyone in your target market. Prospects want to know why they, in particular, should care, what value you can bring to their specific company, and that you're there to solve their challenges in a unique way. While this may not be an idea that's new to 2020, this year has certainly brought to the forefront some efficient and effective ways to personalize your outreach. Subject-matter experts like Josh Braun, Becc Holland, and Sarah Brazier, to name a few, all share their diverse tactics on strong personalization in the form of webinars, podcasts, and LinkedIn posts. We had the opportunity to chat with a couple more experts on the same subject. Here's what they taught us.

The 2 personalized touches that generate 80% of Chili Piper's opportunities

BEST MONTH TO DATE - DURING COVID



Michael Tuso
Director of Revenue
Performance at
Chili Piper
>

Like many SDRs teams across the world, scrambling to respond to a global pandemic poised to obliterate their pipelines, Michael Tuso's team re-evaluated their messaging. He explained that he and his team experimented with a bunch of different messaging, but found that the messaging they had used historically worked best in this new context. So rather than trying to craft “*empathetic*” messaging - they doubled down on targeting. They reached out to unaffected industries, and industries that were doing better as a result of the swing to remote work, and amplified their proven messaging. Instead of referencing the current circumstances and attempting to display understanding, their messaging focused on creating a business case for the target company. And as a result? They had the best month the company has ever had.

WHAT SHOULD A CADENCE LOOK LIKE?

Amid the eternal debate about the number of touches in a cadence required to book a meeting, rather than taking inspiration from other organizations, Michael decided to look at Chili Piper's data. He found that 80% of their opportunities were being generated in the first couple of touches in a 5 touch email cadence. It was the result of another eternal debate in outbound - whether to personalize each message or pop contacts in a cadence and let the tools do the work - that led Michael to find the middle ground of personalizing the first 2 touches.

As for the phone - Michael has his team treating it, for the first time, like a warm engagement mechanism, rather than its own channel for cold outreach. His SDRs might make a dial if a prospect is repeatedly opening their emails, or showed interest of some kind and then ghosted.

THE FIRST EMAIL

First, for context, you have to know what Chili Piper does. Chili Piper Concierge is an inbound scheduling tool that helps qualified leads automatically book a meeting on your appointment calendar or start a phone call right after they fill out a form on your site. Usually, a lead fills out your demo form and gets a thank you page saying they'll be contacted “*shortly.*” If they don't hear from you in five minutes, their likelihood of converting drops by 10x. That's why 70% of inbound requests never get booked.

So, Michael's first email is personalized in the direction of the business case. It is contextual and relevant to the specific company and mentions how Chili Piper's tool could improve inbound conversion from their web form 60-80%. His SDRs screenshot something about the target company's inbound process and incorporate it into their messaging to prove that the outreach is personalized. While this visual component is a big help, the email won't generate a response if the messaging isn't right.

CRAFTING THE MESSAGING

Finding the right messaging as a company takes a lot of experimentation, and a lot of reflection. According to Michael, you have to be attuned to your own internal “spam filter” to weed out anything that might feel too salesy. At Chili Piper, they have a meeting every week focused on just cadences and touch strategy. This is not an accountability meeting, it’s not activity-based, and is totally non-judgmental. They take this time to study what’s working and what’s not with any active cadences, and brainstorm with all parties involved, from the CEO down to sales/marketing interns. This means that SDRs aren’t just told “go book meetings”, they’re actively involved in a forum that teaches them how to book meetings. When the team goes off to experiment, the process is very scientific. They change a single variable at a time and iterate over an extended period until they have something solid. Michael swears that it’s not the messaging itself, but the process of how you find it that is most critical - because this is a process you are going to have to visit again and again as your product and the market evolves.

OBJECTION HANDLING FRAMEWORK

We know how to write a killer first email, thanks to Michael, so we get a response. But what if that response is negative? Michael has learned that most objections that come through email are just smokescreens. With this 3 step framework, you can decipher whether

that’s the case, or whether it’s a real objection. A lot of Michael’s email negotiation tactics are modeled on strategies from Christopher Voss’ Never Split the Difference, like mirroring, tactical empathy, calibrated questions, and shooting for the ‘no’.

1. Get to the heart of the concern

Pinpoint exactly what the prospect is saying or alluding to, and call it out. If they have an issue with x, don’t say you can do y.

2. Reframe the conversation

Reposition the objection to get them to see it from a different perspective.

3. Give a compelling reason for the prospect to take action

A soft ask - it’s better to go for engagement and continue the conversation before asking for a meeting than to ask for a meeting and put the prospect off.

Example: I hear your position. Let me ask one question: aside from your issue with contract length, to what extent did you like the idea of working with Chili Piper?

{{I hear your position. Let me ask one question. Aside from your issue with contract length}} Gets to the heart of concern and goes for the reframe.

{{to what extent did you like the idea of working with Chili Piper?}} Soft CTA.

THE DATA TO BACK IT ALL UP

Michael and his rev ops team pull the data from all the touches in their cadences. At Chili Piper, they are analytical about every single micro-stage in the funnel. They know how many people to reach out to in a single account, over what period of time to generate an opportunity and the ratios that exist between these metrics. They know not just how many replies they get to any particular email, but how many positive replies. They know how much revenue comes from inbound vs outbound, and not just how many meetings but how much revenue each SDR is producing. Michael maintains that SDR teams need to know each specific thing that is contributing to their success.





How to Adjust Outbound Sales to This Challenging Professional Climate with Jason Bay

How does one marry the reality that companies are still trying to sell and grow with the fact that society has been effectively turned upside down and prospects may not be as interested in buying? By doubling down on focus, care, and being consistent, says Jason Bay, Co-Founder and Chief Revenue Officer of Blissful Prospecting. *“So much has happened, but outbound hasn’t necessarily changed,”* says Bay. *“To do it well in our current situation, I think, we need to focus on the right things and do them well.”*

Jason Bay
Chief Prospecting
Officer at Blissful
Prospecting
<

WHAT DOES OUTBOUND LOOK LIKE TODAY?

At Blissful Prospecting, Bay and his team are calling that new focus, that new outbound framework,

Prospecting 3.0. It consists of three basic rules:

Taking a quality-first approach: this is all about finding the right balance between personalized copy and using a template (prospects, today, should be spoken to directly as if you've reached out intentionally)

Engaging with purpose: this is all about rethinking cadence structure to reflect the current appetite for being prospected to, and updating messaging to reflect the current landscape we're navigating.

Teach – don't take: this is all about exercise empathy and care. For example, now is the time to give even more insights to help people make decisions because prospects are likely feeling an increase in risk aversion.

"People are wondering how to keep the team motivated, save pipeline, and avoid layoffs. Make sure you understand that things have changed, and people need a different kind of support," says Bay. "For some people, that might mean shifting customer segments to avoid highly impacted industries like the recruiting space, or airlines, for example. Leadership is critical now as well – help lead and support your prospects whenever you can."

IDENTIFY, ENGAGE, AND CONVERT

The second layer of Bay's prospecting framework consists of these three concepts – identify, engage, and convert. At a high-level, these three concepts have always applied to outbound: you need to identify good fits for your product or service, you have to engage your prospects in a meaningful way to start a conversation with them, and you have to convert them into an opportunity.

But, what makes this different for the current sales landscape, says Bay, is the aforementioned *"teach-don't take."* That's because sales must be even more supportive at the moment. We just can't operate as we were even 6 months ago. That's how much things have changed – for everyone. *"We have to be helpful now. But, what is empathy in current prospecting? If you're just sending emails with "Hey! Hope all is well. Anyways, I'm with Blissful Prospecting..." then that's not good enough,"* says Bay. *"Of course, you still have to understand why your customers buy, but that may have shifted as well. So, where I think you can start messaging is at the pain points they're feeling, and how you can help."*

THE "REPLY" METHOD

All of Blissful Prospecting's outbound thoughts, philosophies, and tactics – including prospecting 3.0,

as well as identify, engage, and convert – are all wrapped into the company’s REPLY method. Think of it as the company’s outbound umbrella term. And it consists of 5 core concepts, that have been adapted to make:

R - relevant results. This means we have to craft tailored messaging that makes sense. For example, don’t sell to small businesses with references to your work with Google. Show them that you understand who they are, not that you have worked with “impressive” names.

E - empathy. Show your prospects that you know what it’s like to walk in their shoes. For instance, if you sell outsourced outbound sales, use the example that Bay provided up top and discuss the fact you know the importance of saving pipeline at the moment.

P - personalization. To be more concrete, personalization and context work together, so show that you have done your research and that you understand the context your prospect is situated in. For example, you can lead with “*here’s what our company does*” but you should immediately follow it with “*let me calibrate it for you as an individual.*” The goal, again, is to show the prospect that your outreach was intentional.

L - laser focus. For instance, peep your email short – they should be no more than 120 words. As for voicemails, they should be no more than 30 seconds. Videos messages should be no more than 60 seconds. And, finally, cold calls should have an opening that is no more than 15 - 20 seconds.

Y - you-oriented. Your messaging should make the prospect the hero. Try and limit how many times you use “I” in your emails.

“Just think: why do you buy products, and why do your customers buy products? Then, ask yourself ‘how does that map to our current landscape?’ says Bay. “Remember, you are still trying to start a conversation and hoping to get people to take action. That is the same, you just need to adapt it to suit our current situation.”



PODCAST



blissfulprospecting.com



PROFILE
Jason Bay

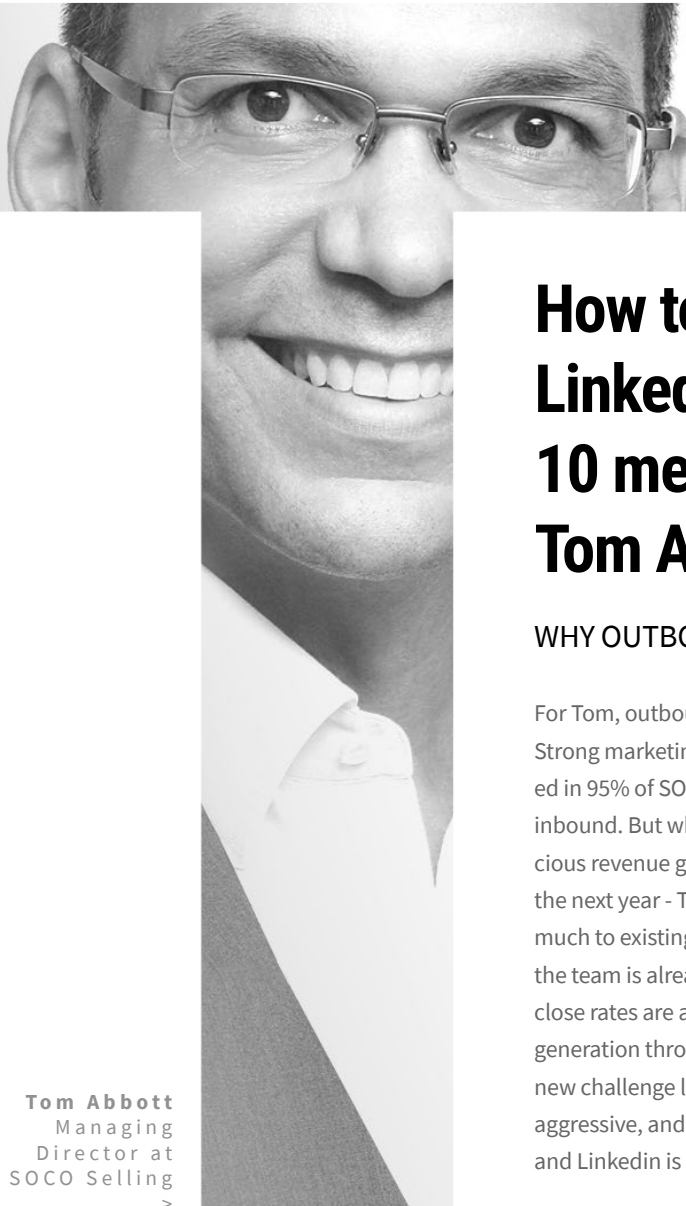


Section 2:

SOCIAL SELLING

Another frontrunner on the list of sales tactics to have taken 2020 by storm is the rise of social selling. For those of you new to the idea, social selling is the process of developing relationships as part of the sales process - usually on a social media platform like LinkedIn. When we think of social selling, LinkedIn movers and shakers like Scott Barker, Jake Dunlap, and John Barrows come to mind. Contrary to what the tactic's moniker may suggest, Social Selling isn't about selling.

A strong social seller builds up their following by first and foremost providing no strings attached value to their target customers, either by sharing content they or their marketing team create, or by sharing content created by other leaders in the space. By engaging with their customers in this way, the social seller builds awareness around their company and solution and proves themselves to be a thought leader and trusted advisor to their target market. In return, the seller learns vital information about their customer like what terminology they use, what challenges they face every day, and what type of content they engage with most. The selling comes last.



Tom Abbott
Managing
Director at
SOCO Selling
>

How to turn 100 LinkedIn profiles into 10 meetings with Tom Abbott

WHY OUTBOUND, WHY LINKEDIN?

For Tom, outbound has always been on the radar. Strong marketing, brand positioning, and SEO resulted in 95% of SOCO's new business coming through inbound. But when they started looking at more audacious revenue goals - specifically, doubling revenue in the next year - Tom only had two options: sell twice as much to existing customers, or boost close rates. Since the team is already smashing the upsells, and their close rates are at a whopping 90%, increasing lead generation through outbound was the only new challenge left to tackle. SOCO needed to be aggressive, and *"proactive rather than reactive"*, and LinkedIn is a great place to do just that.

WHERE DO YOU START?

ICP: Start with a laser-focused idea of who your ideal target customer is. Then, start building robust lists based on criteria like company size, geography, role, function, title, and even specific companies/organizations. When you've got a clear target, you can ask questions like: *"What are the pain points of that person?"* and *"What do they struggle with?"*; and use them to craft messaging that truly resonates.

BECOMING *"THE"* PERSON: While the actual outreach starts with understanding your ICP, the keystone of this approach is building your personal brand on LinkedIn. Sales reps need to position themselves as authorities and experts in their space - someone who is known as a problem solver for a specific title or industry.

Recycle and repurpose content created by your org, and provide unwavering value to your followers to #1: grow your reach, and #2: grow your following - like Tom and his team did with his profile over the last few months. You never know exactly what is going to drive engagement, so shake it up! Post checklists, tips, how-tos, or simple comedic commentary.

And why is this important? Because in Tom's words: *"screw cold! It's cold for a reason!"* In an industry where it's not who you know, but who knows you, people are not only more likely to have a genuine interest but to be more receptive to hearing from you if you've knocked their socks off with your presence on LinkedIn.

THE SEQUENCE:

STEP 1: Connection Request

Hop on LinkedIn Sales Navigator and start running that list based on your ICP. Now you've got your profiles, you're going to send them an initial invitation to connect - always with a personalized message attached. Why? Because Tom says so, and our data doesn't lie, either. You can check out the experiment we did on it in our Outbound Labs video series.

Example: *"Hey Collin, I'm making an effort to expand my network of sales leaders in Vancouver, would you be open to connecting?"*

This connection request message boasts a 90% acceptance rate.

STEP 2: Following Up on Connection Acceptance

This second message is cool, non-threatening, and designed to make it easy for the prospect to say "yes".

Example: *"Hey Collin, thanks for connecting. If there's anything I can do to help you, feel free to reach out. Cheers, Tom."*

STEP 3: Value/Credibility Building

Use this message to start building on that branding and positioning. Still no selling!

Example: *“Hey Collin, happy Wednesday. Just trained a sales team in Singapore about what it takes to hit their targets in the second half of 2019, and thought you might find some of the tips that I shared useful too. You can watch them in this video. Enjoy!”*

STEP 4: Start Asking

Introduce your CTA in a non-threatening way, and enjoy a 24% positive response rate.

Example: *“Hey Collin, hope you’re having a great week. Quick question - who would be the best person at Predictable Revenue to have an initial chat with about training for your sales team? Have a great week ahead.”*

STEP 5: Get a Call on the Books

Asking for the meeting is the hardest part, but it’s really the steps that come after this initial ask that get you that 10% conversion rate. Which leads us to...

STEP 6: Follow up

The timing is tight in Tom’s 9 day, multi-channel follow-up sequence, never leaving the prospect more than a couple of days between touches, and it ends with a very specific breakup message. And the stats are pretty impressive - there is an 80% positive reply rate in total.



PODCAST



socoselling.com



PROFILE

Tom Abbott

How to turn engaging activity on LinkedIn into prospects and personalize at scale with Sarah Hicks

After sorting through a few technical issues, I welcomed our own Sarah Hicks to the Pod. Sarah is a senior SDR with Predictable Revenue and she's been crushing quota over the last couple of months. We found an interesting process on the Internet, so we ran an Outbound Lab's experiment, and she was able to reverse engineer the method. Using this method she was able to CRUSH her quota 130% –

I thought what a great opportunity it would be to share her tactics with our listeners on the Podcast.

Sarah Hicks
Sr. SDR at Predictable Revenue
>



THE “BECC HOLLAND” APPROACH

The topic I wanted to focus on was how Sarah reverse-engineered a proven process and got outstanding results. Following a model used by Becc Holland, and shared on a recent webinar – Becc developed a strategy for her SDRs who were using an ABM approach. She discovered they could find valuable personalization content based on a prospect’s LinkedIn activity. She took specific snippets from a LinkedIn post or a prospect’s comment and inputted the content into an initial email.

Becc’s approach was to start with a target account list, then to follow all decision-makers on LinkedIn to find this personalization content, and then to send cold outreach. Since Sarah was finding that many of her target contacts weren’t active on LinkedIn, she decided to rejig the strategy to meet her needs. If Becc was looking at prospects to find LinkedIn engagement, could she not look at LinkedIn engagement to find prospects instead?

THE REWORKED APPROACH

Rather than limiting the method to her existing targets and then writing the personalization based on their activity, her new approach was to find new prospects already engaging with relevant content. She started by following a robust list of well-known sales thought leaders and practitioners who had large followings and got high engagement on their posts. Next, she kept an eye out for posts on a relevant topic that she knew she could tie back to our company value prop. From there, she filtered through those liking and commenting on the post to end up with a list of people within her ICP and reached out to them following Becc Holland’s original method.

This strategy is extremely effective for us as we have a small SDR team. The first campaign saw open rates of over 90% and a reply rate of over 36%, and after completing several of these sequences in the same month, Sarah hit 130% of her quota. But the approach may not work so well with a large team. You run the risk of different sales reps scraping the same posts, or running out of viable prospects as the same people tend to engage with thought leaders’ posts. But in our case, it was a great way to find relevant prospects and start a relevant, personalized conversation.

IN THE EYES OF THE PROSPECT

The initial email follows this structure:

“Hi {First Name},

I saw you liked {Thought Leader}'s post about {key takeaway from post}. //
I saw you commented on {Thought Leader}'s post about {key takeaway from post}.

What really stood out to me was {excerpt from Thought Leader's post}. //
What really stood out to me was {excerpt from prospect's relevant comment}.

What if we could {solve the problem detailed in the post/comment}?

Give me a chance to unpack that on a quick call. How's your calendar looking on {day}?

Cheers,

Sarah”

Sarah explains that, if a prospect liked or reacted to a post, the initial email is speaking to the post as a whole. If they commented something specific that she can tie into our own value prop for Predictable Revenue, then the email is referring to the post and to their comment itself. The email is “short and to the point” and shows the prospect not only that she’s done the research on them, but that she’s pulled something meaningful from that research. The method also allows her to offer Predictable Revenue as a solution a potential solution to whatever pain point was mentioned in that initial post, or that the prospect commented.

The Predictable Revenue SDR received an unprecedented number of replies from these sequences. Even the prospects responding negatively to her offer commended her on the strong initial email. And we’ve heard from several SDRs outside the company that have tried this strategy that it’s going exceptionally well for them too.



PODCAST



PROFILE

Sarah Jane Hicks



predictablerevenue.com



Section 3

GET WITH THE TIMES

When we're looking to bring someone new into the sales team here at Predictable Revenue, we're not looking for half a decade of sales experience. We're not looking for someone who's worked in our space or for a company like ours or targeting customers like ours. What we look for is agility, coachability, and, most importantly, adaptability. That's because the sales beast is ever-morphing.

There's no cookie-cutter solution to getting opportunities in the door, and the thing that worked last week might fail today faster than you can say "remember-when-all-of-our-emails-were-suddenly-going-straight-to-spam?" If there was ever a year that required flexibility to stay on top, it was 2020. Thankfully, we had a few masters of change on the show to teach us the ways they've kept up to date with changes, or made changes themselves.

Updating the Hunter-Farmer Sales Model for Today's Nuanced Sales Landscape

The hunter-farmer sales model has long been an accepted way of looking at the different roles that exist, primarily, in the Account Executive world. You, likely, know them well: the hunter is the lone wolf salesperson focused entirely on getting new deals, while the farmer grooms their well-known territory to grow accounts. Despite these tropes existing for years now, they are still, for the most part, accurate.

But, according to Sean O'Shaughnessey, Chief Revenue Officer at Agile Stacks, they have expanded. Sure, hunters and farmers are still around, but in our varied and changing sales landscape, more nuanced classifications are needed. Enter Sean O'Shaughnessey and the "Trapper" sales model.

"The traditional hunter-farmer model is too simplistic in our relatively complicated world. I've always sold fairly complicated products, with long decision-making times. That's my experience," says O'Shaughnessey.

"Furthermore, salespeople usually don't say they are farmers – they say they are hunters. And I've seen people lose deals because of that hunter mentality."



**Sean
O'Shaughnessey**
CEO & President
at New Sales
Expert
>

EXPANDING OUR DEFINITION OF SALESPEOPLE

According to O’Shaughnessy, a more realistic framework for evaluating a salesperson’s particular role is to add two more personas – the gatherer and the trapper. Let’s look at each in more detail:

Hunters – this is the lone wolf salesperson, entirely focused on closing deals. They are driven by “*the kill*” and are comfortable in high-volume, highly-transactional sales environments. They shoot at everything and, as a result, miss a lot. But, they’re volume players;

Farmers – farmers, typically, have their plot of land, and they put a lot of work into it to cultivate it and put good seed down. More of the account manager type. Servicing their accounts or their territory, primarily through upsells. This is akin to a Customer Success role;

Gatherers – gatherers are similar to farmers, but they bring back lots of new stuff. They are more proactive than farmers, they know their territory, and, generally, have good relationships with high-quality companies. They are constantly trying to grow that account and are known as trusted advisors.

Trappers – this is also a closing-focused role, similar to the hunter. But, instead of shooting in every possible direction, the trapper understands exactly what to shoot at, and they know how to strategically place their traps.

“The strongest salespeople are trappers in a gatherer position – they are salespeople selling to high-quality companies and they are tasked to maximize revenue from that target,” says O’Shaughnessy. *“That person is entrenched. Competing with that person is nearly impossible.”* But, adds O’Shaughnessy, one can be successful in any one of those personas – if they work hard enough. *“If you work your ass off, then there isn’t anything bad about any of these,”* says O’Shaughnessy.

“You can be absolutely one of them and succeed.”

WHAT DOES A GOOD TRAPPER DO?

A critical reason for this persona expansion, says O'Shaughnessy, is the account for greater consistency. For instance, let's look at the potential downfalls a farmer could suffer: if they get caught in a drought, or bad rainstorm, they could go starving. Sure, farmers close deals, but they can have good and bad years. Conversely, a hunter sees and shoots – that's what they do. It's a wonderful inclination. But, what if they don't find anything? The hunter has to have lots of targets, or they too can go hungry.

So the advantage trappers have is a more strategic mindset. For example, in a complicated sales cycle, there is always a decision-making timeline. There are a lot of steps before a decision is made in a complicated sales process. A trapper, therefore, wants to enter the sales cycle as early as possible, but while still being able to control as much as they can. To do so, they need to build tools and techniques to help this process because the longer the sales cycle, the more costly it is (salespeople can work fewer accounts). One such tool, says O'Shaughnessy, is sending a newsletter to stay top of mind.

WHAT DOES A GREAT SALESPERSON DO?

Of course, across the spectrum of sales personas are core principles that every salesperson should understand. Namely, says O'Shaughnessy, is the fact that ev-

ery salesperson sells three things: their product, their company, and themselves. But, of those three, it's selling themselves that is of paramount importance.

Why? Because a salesperson will always have to compete against a product that, more or less, does what their product does. So, they'll always have to be able to sell it. Moreover, a salesperson will always have to be able to sell their company because companies, like products, tend to be similar.

So what's left...is the salesperson. Can they establish themselves as a trusted advisor? Can they become the kind of person that a customer believes will always be there for support? If so, then they've likely got a closed deal on their hands. *"If those are all ties, then you are selling yourself. You are selling the fact that you can be trusted, and depended upon,"* says O'Shaughnessy. *"Salespeople win the deal because the salesperson made the prospect comfortable that they will make them successful. That ability is huge and overcomes product deficiencies and company issues as well."*



PODCAST



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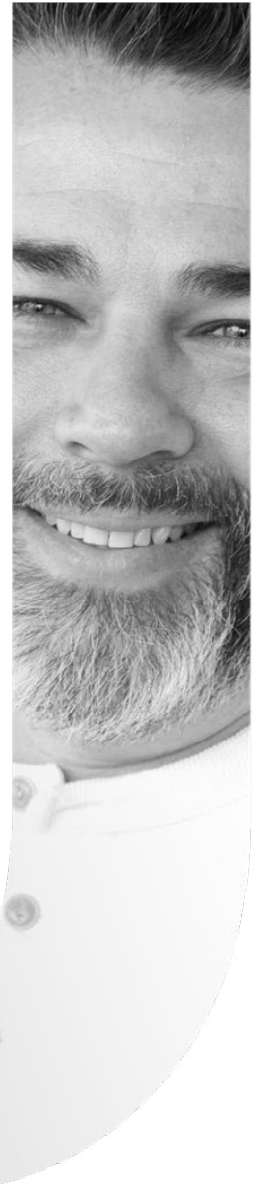
PROFILE

Sean O'Shaughnessy

The rise of the anti-metrics sales leader with Joshua Desha

Metrics have become a pillar of modern sales. From interviews to meetings, to one's day-to-day tasks – metrics, in one way or another, have become a part of them all. And, at least on paper, that evolution has made sense: why wouldn't we, as salespeople and company leaders, make decisions and base our planning on numbers? Why not let data drive our plans?

Joshua Desha
Director of
Channel Partnerships
at FirstStar HR
>



Well, not everyone sees it exactly that way. According to Joshua Desha, a veteran entrepreneur and insurance sales leader, a metrics-driven approach to sales has robbed the professional of its heart and soul. *“It’s interesting, We are all taught, from the beginning, that trust is the reason people buy. Yet we are also told that we need to turn into robots and reach out to hundreds of people, trying to get them to say yes to a meeting. It’s all about volume,”* says Joshua Desha. *“But, trust and volume don’t work together – these things don’t align. Is it any wonder because of that that fewer people want to be in sales? Sales used to be noble. Sales is an industry where people can make tons of money, but it is now the 3rd, 4th, 5th choice for people in their careers. I believe metrics are at the root of this.”*

PROMOTING BAD SALES BEHAVIOUR

So, why is volume such a bad thing? Surely, if you reach out to more people you increase your chances of generating opportunities, right? Not quite, says Desha. It is true that the more area you cover, the more conversations you will have. But, leaning on numbers versus getting to know your prospects and your community is, in the long run, more important. And a dependency on activities – your daily touch-points, if you will – hinders one’s ability to build trust, rapport, and connection. *“Salespeople, too often, don’t have to think about how to treat a prospect, it’s, again, all about volume. This is what [focusing on metrics]*

teaches you. That creates a lack of emphasis on taking care of a person,” says Desha. *“Instead of volume-based selling, it should be value-based selling. Metrics takes it away from value - over and over again.”*

The dehumanization of the sales process is furthered by companies not investing in the sales process or, by extension, their salespeople. For example, the compensation structures for salespeople are often heavily based on commission (uncapped commission in many respects). And what is at the core of uncapped commission? Again, activities, or metrics.

“We make salespeople jump through hoops, and complete assessments. Then, we hire them and pay them \$2,000 a month. All of that potential only exists if they hit their quotas. It isn’t honest. We would never treat a Head of HR like that or a Head of Marketing like that,” says Desha. *“Why is that a salesperson is told that we can only pay \$2,000 per month and unlimited potential? Because we know they are going to call 50 people per day, and we have a closing ratio of X. From there, a company knows what they can bring in. The vast majority of people don’t hit the OTE that is outlined.”*

Let’s not forget about the element of luck involved in selling, too. If you have a better territory or better accounts, you’re going to crush it. That, of course, doesn’t mean you are a better salesperson. But, the salesperson with the less attractive territory is only going to have up their activity levels to keep up.

HUMANIZING SALES MANAGEMENT

So, how do we get away from that dependency on metrics? How do we, as an industry, foster a culture of value instead of volume? It starts, says Desha, with offering your salespeople a realistic compensation package. *“Pay salespeople as though you value their contribution. If it’s all commission or heavy on commission, you are telling them they are a dime a dozen, and you don’t value them. Shift your mindset from volume to value,”* says Desha. *“That will promote a system of not just talking to as many people as you can. Instead ask, ‘who do I need to talk to? What research do I need to do? That, in turn, will help you create great relationships with them.”*

Think of it this way: if you need a closing ratio of 18-20%, you could have 50 great calls that will create 20 actual conversations. Those 20 conversations will create 10 appointments, and from there 1 - 2 will close. Or, says Desha, you could *“research the hell” out of 10 people, get to know them, and close 2 of those calls. As such, the 18-20% closing ratio stays intact. “A happy salesperson who will be energized and probably go out and try to do 20 of those calls,”* says Desha. *“And they will ask: ‘what can I do in the community today?’ instead of ‘how many people do I call today?’ That is how you fix it.”*

From a management perspective, falling back on metrics shows a lack of knowledge and trust. If you’re

doing proper call reviews, coaching, the metrics at the end of the day, don’t tell the whole story. You really need to understand sales, and what reps need to work on, so they can close what they need to close.

BALANCING TIME CRUNCHES AND GIVING YOUR PEOPLE SPACE

Of course, companies need to grow. Maybe you’ve taken on investment money and growth is a requirement from the board – that is real pressure. But, again, a value-based approach can support growth, says Desha. This is not an either-or scenario. *“Having a value-based system doesn’t mean there are no goals. In metrics based selling, you are valuing the touch. In a value-based scenario, you are valuing what comes from those calls or engagements,”* says Desha. *“So, if you are my salesperson, I’m going to ask you how you feel you can get to your goals.”*



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PROFILE

Joshua Desha



Effective tips for people in non-traditional sales roles with Chris Spurvey

Chris Spurvey
Founder at
Chris Spurvey
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Not all who end up in sales envisioned themselves in sales. That's true for a lot of us. Sales is a great career – full of countless professional opportunities, financial incentives, and potential leadership avenues – but, still, most sales professionals wind up in the job after having focused or trained in something else.

Take entrepreneur, sales leader, and published author Chris Spurvey – he began his fruitful journey in sales almost by accident. While still in college, he and two colleagues started a small web design agency. His partners had the technical expertise, so Chris wound up being tasked with getting clients. And, according to Chris, it was a steep learning curve particularly because he didn't identify with a lot of the sales philosophies and templates available in books at the time. He had to make the job work for who he was. *“I Always embodied the sales role throughout my career. But when I started, I read sales books, and never connected with a lot of the philosophies. So, I made mistakes. I fell hard, learned lots, and failed miserably,”* says Spurvey. *“That's when I realized I had to sell the way he needed to sell – I couldn't just follow other books and templates.”*

THE IMPORTANCE OF A POSITIVE MINDSET IN SALES

This *“that doesn't sound like me”* sentiment is a situation faced by many people who become successful

salespeople. So, having the right mindset about the salesperson you want to be is critical.

For example, when Spurvey was you a door-to-door vacuum salesman visited his home. And, over the course of a short chat with his parents, that salesman convinced them to buy a \$3,000 vacuum – a lot of money for those days. For weeks after, he remembered, his parents argued about how to pay the new purchase off.

That picture, that memory of sales, stayed with Spurvey for years. And it affected his entry into the sales world because the image he was carrying simply wasn't how he wanted to conduct his sales process. *“That was how sales was planted in my mind – 10 years later I was beginning in sales for our small company. But, that vacuum sales process doesn't work for me. I can't sell that way. And that's why I failed because I had that picture in my head. Sales, of course, is not that negative picture. Sales is critical, it brings revenue, and it brings growth,”* says Spurvey.

“So, we need to reframe that sales picture we have. The picture or mindset we have 100% impacts how we take on this job. We have to look at sales in a more holistic way, a more supportive way.”

REFRAMING SALES

So how do we reframe the sales job? What should it look like? According to Spurvey, it's important to both get personal and start with the premise of why people buy things to answer that critical question. People buy based on how they feel, and then they justify that feeling logically afterward. Whether sales is in your title or not, when you meet somebody that is a prospect, they form an opinion pretty quickly.

First things first, you have to be genuine and authentic. And, then, you have to understand what drives you as a salesperson. *"I realized I was motivated to sell when I had a desire to grow my book of business, and I just went out there and did it. To get out there effectively, I formed a vision of my life that was of service, delivering value,"* says Spurvey. *"Your prospects need help – and that is where you can be of service. So, use that, get on the rooftops and scream that. That is how we support, that is how we help. This is how I got motivated to get out there and do my best."*

THE LADDER

Once you get your mindset right and decide how to best display your authentic nature while selling, it's paramount to learn a few tactical tips and tricks to help you close deals. What are the raw materials you need to be successful? Well, you need prospects. If you have no one to talk to, closing deals will be...difficult. But, there are lots of opportunities to grow a business, and most pass us by because we don't have a framework to determine if we can help someone or not.

To capture those opportunities, to cement those tips and tricks, Spurvey has developed a framework he calls *"the Ladder."*

The first rung on the ladder is concerned with the messages, or conversations, you are putting out into the market.

The next rung on the ladder, says Spurvey, is explaining what it is you do. For example, when you discuss one of the four aforementioned topics, a person typically responds with “*what do you do?*” This is where many salespeople fail. Too many, says Spurvey, answer with their titles: “*I’m VP of Business Development at KPMG*” or “*I lead sales for SAP.*” These titles, sadly, don’t mean anything to a potential prospect or connection. Instead, discuss your job in terms of the benefits you bring: “*I help companies fixing their procurement process through software*” or “*I help train consultants on how to build their book of business.*”

From there, says Spurvey, a potential prospect will say: “*oh, that’s interesting, how do you do that?*” At this point, stresses Spurvey, instead of responding with a well-crafted answer about your job, ask to meet for a coffee so you can chat more. “*It’s hard to go into the nitty-gritty in a public space, or at a networking event. So get that conversation booked, and get into the details and find out if there are problems you can solve. Almost every time, this works. I may be oversimplifying the sales process here, but this applies to sales across the board,*” says Spurvey. “*But the bottom line here is, no matter what you sell, or where you sell it, what you are driving at is: what is the pain in their life and can I help solve it?*”





Section 4

BE EFFECTIVE

In a year that taught us to be stringent with our budgets, kick-starting prosperity measures like it was 1929, we learned to trim the fat wherever possible. This gave rise to a whole bunch of masterful strategies to make sales teams, sales processes, and even sales meetings more efficient. We spoke to Rene Zamora about managing small virtual sales teams effectively, and to Armand Farrokh about managing large virtual sales teams effectively.

Josh Braun, Rex Biberston, and Belal Betrawy, respectively, coached us on how to cut the fluff. But we wanted to share with you here how Fabien Pataud turned the traditional, often laborious coffee meeting into cold, hard cash, and how Christi Wall developed a system to capture feedback and from her team during the buying cycle and turn it into a data-driven sales process.

How do you turn coffee meetings into dollars? Sales expert Fabien Pataud shares his secrets

Getting together for coffee: it's a request that comes to entrepreneurs and salespeople all the time. And it's enticing – you never know what will come from a chat with a new connection. Growth is critical to any business, and keeping the door open to anything that may contribute to growth just feels prudent...right?

Well, not exactly. At least, not according to Fabien Pataud, Sales and Profit Coach at Pataud Consulting. Sure, the idea of having coffee with someone that could possibly make you money is attractive, but when was the last time one of these meetings contributed to your pipeline just once, let alone regularly? *"I turned to networking when I launched my business and didn't yet have a website or any other marketing materials.*



Fabien Pataud
Founder at Pataud
Consulting

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Part of that networking was coffee meetings. I, like many others, figured you never know what will happen, so I took a lot of those meetings,” says Pataud. *“But, coffee meetings take a long time, you have to take the time to travel to and from, as well as the meeting itself. Unfortunately, the ROI on them isn’t huge – nothing ever really happens. And time is money.”*

TURNING COFFEE INTO REAL DOLLARS

Coffee meetings aren’t stopping, for Pataud or any other entrepreneur. So how, then, did Pataud turn those still-important coffee meetings into dollars? How did he make sure his time was money? Well, he started qualifying those that wanted to have coffee with him – a trick he learned from Michael Griffith’s Referral Marketing framework.

“I started utilizing the discovery call process for those coffee meetings to make them more efficient. It wasn’t easy, though. Most people like the old way of having coffee where things go nowhere. It caught people off guard, but it actually was to make the meetings better,” says Pataud. *“By having a discovery call before confirming a coffee meeting I was able to make sure it was actually worth our time to meet, as well as prepare my thoughts on plans for when we did get together. This actually kicks off the sales process.”*

THE FRAMEWORK

What types of questions does Pataud ask on those discovery calls?

According to Pataud, the key areas to identify before you have a meeting are:

- Whether or not you believe you can help at all;
- If they are in direct competition with you;
- And, finally, if you have shared alignment on values and mindset, and if they appear fun and easy to work with.

After considering those critical topics, Pataud recommends asking yourself these questions:

- Have I worked with this kind of person before? If so, how did it go?
- If no, do I have credibility in this area?
- Am I experienced enough to help? And, how confident am I that I can get them the result they need?

“People who succeed take action, and take the right action. So, I had to be careful on where I spend my time – and these questions help me do that. If I don’t get that return, I’m costing myself money. You have to say no, in fact, you have to say no a lot,” says Pataud. *“We tend to say yes often because we*

don't know what is behind a door. But, you have to work out what is behind the door before you open it. You need to stay focused, and, looking forward, not spread around in multiple directions."

THE MEETING

Once you've done your qualification and it's apparent that a meeting is necessary – it's time to prepare. And, depending on the nature of the meeting, there is a couple of different ways you prepare:

- Either for a sales meeting (you're selling to the other party in the meeting)
- Or, for a partnership meeting, in which both yourself and the other party can mutually help one another by introducing potential customers.

If it's a partnership meeting, then Pataud stresses doing some homework and bringing with you some potential leads for the other party. Who can you introduce them to? This establishes your interest in supporting them and will inspire them to do the same.

If the meeting is more sales-focused, and you think the party you are meeting could become a customer, then framing the meeting as such from the get-go is critical. *"In these meetings, I tend to*

veer away from spending the first chunk of the meeting building rapport. Time really is money," says Pataud. *"So, set that up very early in the chat – make it efficient and valuable."*

To aid in that efficiency, Pataud suggests scheduling the coffee meeting at one of the party's respective offices as it can be tough to close someone in a crowded cafe. Because that's what Pataud tries to do: when at a sales meeting, he opens the meeting by saying he is going to ask direct questions, to understand their business completely. From there, he moves quickly to discussing an action plan that includes details about onboarding and payment details. If there is resistance, Pataud says, he makes sure to turn the floor back to the prospect so they can deal with objections as needed. *"Biggest element is the genuine authenticity at the beginning. Pull all the objections out nice and early – don't waste people's time,"* says Pataud. *"So be quick and get to it."*



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pataudconsulting.com



PROFILE

Fabien Pataud

Turn your critical internal sales knowledge into an effective training program with Christi Wall

We've known this about salespeople for a long time: they are on the frontlines of interactions with customers and, therefore, have a depth of knowledge of why people buy... and why they don't. Unfortunately, that resource is often untapped. Salespeople are busy, running from meeting to meeting and call to call – those quotas aren't going to make themselves, after all. As a result, that knowledge lives with them, each individual salesperson, either in their heads or in a folder on their desktop.

Organizations suffer as a result of this scenario, of course. That first-hand knowledge, that direct connection to the customer is invaluable. What exists in its place, often, is more general marketing materials: top-of-funnel collateral, brand positioning pieces, and thought leadership, for instance.

The good news? This is an easy problem to fix. All it takes is someone to ask a few questions and extract all of that amazing data. "When I first started in sales enablement, I saw an issue. Organizations have data, information, processes. All are necessary, but they are only pieces of what makes people successful," says Christi. "*Sellers, however, develop a host of information on strategies and tactics that work and that don't work,*



Christi Wall
Director of
Revenue
Enablement
at Chainalysis
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but that haven't been codified by those more formal processes. That information needed to be extracted to build an effective enablement program. Getting that information was mission-critical when I started."

THE IMPACT OF DOCUMENTING PROCESSES AND INFORMATION FROM YOUR SELLERS

First and foremost, getting to understand your salespeople's processes, tactics, and successes builds trust. Getting salespeople to open up can be hard – again, everyone is super busy – but by taking the time to understand what they are going through on their day-to-day, you will earn their respect and help.

Next, you get the critical, nuanced data you need to start building an efficient training and sales enablement program that will help grow your sales team, and your company. Remember: you can't scale a sales org without people. And you can make them successful unless you train them and set them up with the tools they need. And, finally, you can't train unless you have codified what has worked and what hasn't. *"We have to empower our sellers – understand what they need and translate that into programs. Enablement is a new function, taken off with the rise of SaaS and software. And most in enablement have to come to it from some other route," says Wall. "When you capture institutional knowledge, it really helps with scale. It helps inform others."*

HOW CAN I ENSURE ENABLEMENT CAN MAKE SALESPEOPLE AS SUCCESSFUL AS POSSIBLE?

According to Wall, there are lots of ways. But in her experience, there are three specific tactics a company can employ to extract information from its sales team.

Co-creating content: When Wall started in enablement, she collected content to educate herself. She came across a lot of marketing material but noticed quickly that there was a gap between marketing and sales content. Sales content was focused on getting people to buy ASAP – and sellers were modifying marketing content to get that message across and stay relevant to their customers. So, she worked with sellers to understand those modifications and understand their thought process. Then, she worked with reps to create compelling content: what Wall calls *"by sales, for sales"* content.

Capturing customer wins: This content shares customer wins, typically in the form of case studies. Think of these case studies as critical pieces in educating new salespeople, and arming other sellers. Questions your *"customer win"* content should be answering are: what do customers like us for? Why do they buy our product? How did we win? Who were we up against? What tactics progressed the deal through the buying cycle?" All of these questions can be answered relatively quickly by your high-performing sales team. Don't forget: they know this stuff because they live it every single day.

Recorded informational interview: Generally speaking, sales and marketing teams have begun producing podcasts to entertain their market and, of course, attract new leads. But, in the enablement and training worlds, a podcast can be a powerful tool for learning. What Wall and her team did to produce this type of content was to chat with sales reps when they closed a new deal. They would discuss the tactics they used to get the deal, who their competition was, and what pitfalls they navigated along the sales cycle. As creative endeavours do, the podcast evolved. Instead of chatting regularly with reps, they instead found time for a 30-minute chat with them, in which they discussed sales topics in more depth (for example, how to go up against a certain competitor). What came from these discussions was, typically, a 20-25 minute long podcast that they made available to their sales team to listen to on their morning commutes, or at the gym. This tactic surfaced critical sales information that was easily digestible by anyone on the team.

“One tip for effective interviewing for those interested: ask ‘why’ multiple times is a good tactic. It can be annoying, but very effective,” adds Wall. “The more ‘whys’ you get in, the more you will uncover.”



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chainalysis.com



PROFILE

Christi Wall



Section 5

DON'T BE AFRAID TO THINK DIFFERENTLY

In the same vein as the need for adaptability, this year was one that welcomed out-of-the-box ideas and strategies. We spoke to many experts who came up with new solutions to traditional problems. Joe Sullivan showed us how to build a content strategy to replace trade shows and travel in industries that historically relied on them. Nick Cegelski taught us how to work the white space in between meetings rather than focusing solely on real-time conversations with our customers. And we spoke to some experts who turned well-known strategies on their heads. One such expert is Kris Hartvigsen. Here's how his team sells to the decision-maker, without targeting the decision-maker.

How Dooly executes a product-led sales framework with CEO Kris Hartvigsen

Kris and his team don't go straight for the person at their target account with buying power. They don't even ask a more junior member of the team to champion the purchase of their product. First, Dooly makes itself indispensable - for free.

The process Kris and his team are executing is called product-led sales – a framework, typically, in which the end-user is targeted with a free version of a product, and once they have made it part of their day-to-day and can't live without it, a salesperson engages the senior members of the team in a sales cycle to get them to start paying for the product.

“The world has flipped a little bit. Today's hottest stocks are product-led solutions like Slack or Zoom,” says Kris. *“Let's take Zoom, for instance. If we were on a free version of Zoom, when it hits 40 mins, it shuts off. And if you're a product-led solution like Zoom – that is the moment where someone starts to pay. If I'm a user,*



Kris Hartvigsen
CEO at Dooly
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PROFILE

Kris Hartvigsen

that's when I'm whipping out my credit card because I do not want to get cut off. When you pay, you get into the superpowers of that app."

DOOLY'S PRODUCT-LED SALES PLAYBOOK

According to Hartvigsen, it all starts with the user. "We are a bit different than most companies – we go after the end-user, want the end-user to fall in love with our product. We want to fulfill the needs of sales or customer success and solve the immediate pain they have in the day," says Hartvigsen. "An important element of this kind of selling, and of our product, is that it gives them an endorphin rush that is hard to replace with an enterprise solution like Salesforce or SAP. It can't be the big, huge CRM or ERP systems. That's a key to product-led sales – it has to be dead simple and super easy to set up."

The reason simplicity is essential to product-led sales is that simplicity leads to adoption, and adoption is the key to closing deals in this world. For example, Dooly sells to sales teams. Early on the company's existence, says Hartvigsen, they realized a single user could find their product and fall in love with it.

But, if Dooly wants to sell their product, and get people away from the free version, their product has to spread throughout an organization. If a whole team or department is using Dooly, then making the case to the buyer – sales manager, VP of sales – becomes much more powerful. "If it doesn't proliferate into the organization,

then they may not be inclined to pay for it, or their boss to pay for it. The more people that discover it, the better the chance you can close the deal," says Hartvigsen. "If one person at Nike uses it, big deal. But, if the whole sales org does, then they are more inclined to write a cheque."

THE ROLE OF CUSTOMER SUCCESS IN PRODUCT-LED SALES

Another core piece of the product-led sales framework is the role of customer success. Historically, customer success has been considered a different department – siloed from sales. But, in more recent times, customer success has become a more effective branch of sales, responsible for upselling (growing accounts) and converting users from a free product to a paid one. According to Hartvigsen, the latter responsibility is critical in product-led sales. "Customer success is now another way of saying sales, but in another discipline. Slack mastered getting customer success involved in mastering adoption – CS played a huge role in converting you free from free to paid. And the same goes in our world," says Hartvigsen. "We very intentionally layered CS into the sales story. So, when we are in a sales cycle, we have those stories, etc. easily accessible. And we have everyone at Dooly spend 5% of their time dealing with customers. Everyone has to have time with the customer, it helps you understand the product, its features, as well as with product development, sales – everything."

CONCLUSION ..

With each passing year, the sales landscape becomes more and more complicated. The number of tools we're expected to manage, and the number of resources we're expected to leverage grow at a dizzying pace. But in the whirlwind of automation tools, data providers, CRMs, sales enablement platforms, and ever contradictory tips and tricks, 2020 seems to have brought us back to basics. True personalization wins replies over templated mass outreach. People don't care what you do or how you do it, just that you've done your research and can articulate the value that you can provide them and their company.

Becoming an expert in your field and providing value to your customers via social challenge is appreciated over cold outreach and going straight for the meeting. We've seen both sales management and prospecting styles move away from the data and back towards the human. With tighter budgets, we've had to make better use of our time, money, and resources. And, perhaps most importantly, we've had to keep an open mind, experiment, be curious, and never be weighed down by our assumptions.

2020 has been a hell of a year. While we can't say we'll miss it, there's nothing that teaches you to pull yourself up by the bootstraps quite like not knowing if your business will still exist tomorrow. We're grateful for another year filled with learning from our own experience, our experiments, and from our talented and masterful guests on the Predictable Revenue podcast. Here's to many more.

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