Boost **SALES PRODUCTIVITY**
Get More from Your Sales Team
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INTRODUCTION

Sales teams need to be prepared to perform well and drive revenue in any environment, especially in a constantly evolving technology and customer landscape. As companies strive to grow or sustain their businesses, they need to explore new ways to amplify their sales teams’ selling power.

To grow their businesses, companies often consider a mix of the following three approaches:

1. **Drive Strategic Growth**
   Implement, measure, and execute new go-to-market strategies for reaching new customers or untapped markets.

2. **Boost Sales Productivity**
   Empower sales teams to sell smarter and faster by using sales intelligence to prioritize the highest-impact actions and maximize each team member’s potential.

3. **Win and Grow Customers**
   Use deep customer knowledge to deliver personalized, seamless buying experiences — both to bring in new customers and to effectively retain, cross-sell, and upsell existing ones.

In this e-book, we’ll dive specifically into how companies can boost their sales productivity. Though we know there isn’t a one-size-fits-all solution, we’ll define sales productivity, identify potential obstacles, and walk through areas to invest in to maximize your sales team’s productivity.
CHAPTER 1

OBSTACLES to
SALES PRODUCTIVITY

At the end of the day, there is no perfect guide for achieving maximum sales productivity. Every sales team has its own nuanced selling processes that may impact productivity levels. However, there are three primary obstacles that we’ve seen sales teams struggle with across the board. These three areas greatly influence sales productivity — whether you’re having a difficult time with one or all of them.

Boosting Sales Efficiency
Gartner found that sellers in companies that have more customer, product, and organizational complexity to navigate have a 12% lower deal conversion rate. That’s because those complexities can hamper a sales rep’s ability to be efficient and can take time away from high-value, deal-impacting tasks. At the end of the day, sales reps need to navigate many low-value, manual tasks that bog down their to-do lists. Things like entering (and maintaining) data, navigating disparate tools and systems, maneuvering complex processes, and even finding time during business travel all contribute to seller burden in a sales organization.

Making Winning Sales Decisions
An efficient sales rep is able to move through their to-do list quickly and complete dozens of customer touchpoints — but if they’re not completing the right actions at the right time with the right customer, you could be losing out on potential revenue. For example, if your sales rep closes several small deals but leaves a big customer waiting because they didn’t know it was sitting in their queue, your organization could lose out on that deal. Things like inefficient prospect prioritization, low-quality sales performance data, and working in silos can all negatively impact your sales team’s ability to have the broader picture and make smarter selling decisions.

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Maximizing Every Sales Rep’s Potential

Sales leaders – tasked with making sure they are maximizing their sales force’s potential – have been investing more into sales enablement. In fact, research shows that high-performing sales teams are 1.4 times more likely to use a sales coaching and training solution. Yet, despite an increase in sales enablement-related investments, sellers are saying it is actually making their jobs more difficult. This may be for a number of reasons, but we know that it is incredibly challenging when sales reps don’t adopt training, and when you’re not able to determine training’s impact on sales performance.
CHAPTER 2

The SALES PRODUCTIVITY EQUATION

Though there isn’t a perfect guide out there, there is a sales productivity formula that is worth checking out. Jason Jordan from Vantage Point Performance defines sales productivity with this equation:

PRODUCTIVITY = EFFICIENCY X EFFECTIVENESS
Optimizing your sales processes and tools with efficiency and effectiveness in mind can boost sales productivity. Let’s dive deeper into the three areas you can invest in to drive greater productivity in your organization.

**THREE AREAS YOU CAN INVEST IN TO DRIVE GREATER PRODUCTIVITY IN YOUR ORGANIZATION**

1. Efficiency
   The dictionary defines “efficient” as achieving maximum productivity with minimum wasted effort. The key part to focus on is “minimum wasted effort.” That means your sales reps should be focusing their time and efforts on high-value tasks, rather than low-value or repetitive tasks that are preventing them from focusing on their customers’ needs and building valuable relationships. Basically, if you want to improve your sales team’s efficiency you need to find ways to eliminate potential time wasters – such as manual or repetitive work, like data entry, that can be automated.

2. Effectiveness
   Efficiency and effectiveness go hand-in-hand when you’re trying to boost sales productivity. Your team may be leveraging efficient processes, but still making ineffective selling decisions. For example, if your sales reps are pitching the wrong value proposition to a customer segment, it really doesn’t matter how many customers they’ve managed to talk to.
3. Enablement

Now, if you want your sales teams to be highly productive, they need to be continually enabled with new skills throughout their career. This sounds like common sense, right? But enablement is a tricky area to navigate and goes beyond just sales training. In addition to offering engaging and relevant training, you need to consider whether or not you are enabling your sales reps with the right tools, processes, and systems at the right time.

In the next part of this e-book, we’ll cover different ways you can use technology to make an impact on sales efficiency, effectiveness, and enablement.
Efficiency is about knocking on as many doors as possible; effectiveness is about what you do when the doors open — there are two different forces at work that influence the productivity of your sales team.

JASON JORDAN
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CHAPTER 3

ELIMINATE LOW-VALUE ACTIVITIES through AUTOMATION

There are many tasks that are vital to running a successful sales team like updating sales data, entering customer information, coordinating calendars, taking notes, making phone calls, sending emails … the list goes on. Manual and repetitive tasks are small but mighty – a few minutes here and there can result in several hours of lost productivity.

A lot of information flows in and out of a sales team, and manually logging sales data like activities or contact information can suck up a large part of a rep’s day. Manual data entry also opens up the possibility for erroneous, outdated, or incomplete data. After all, during the sales process, data moves through different people, who may enter and classify information differently. And, on top of capturing and updating sales information in their system of record, reps also need to share this information with their support team. All of this adds up to a lot of lost time. This is where productivity tools that automate manual and repetitive data entry come in handy.

LOW-VALUE TASKS YOU CAN AUTOMATE

Entering Sales Data

Sales reps currently spend 8% of their day manually entering sales data – things like updating contact information and deal stages, logging calls, and recording meeting notes. Automating this process can give your reps more time to connect with customers, and ultimately close more deals. Imagine if your communication tools like email and phone talked directly to your CRM, so that as your sales reps receive an email with a new signature for their lead, the contact information is automatically updated. Whether it’s entering notes during a phone call or updating the opportunity stage once the call is completed, the process of entering sales data shouldn’t hold your sales reps back. Invest in a CRM that has automation built right in, so that your reps can move through their work queues without disruption.

Percentage of day sales reps currently spend manually entering sales data. 8%
Sales Playbooks and To-Do Lists
Sales reps spend a lot of time switching back and forth from their playbooks to their task and lead lists to try and understand what the next best step or the next customer to contact is in their sales process. Building your playbook into your CRM and offering a sales path to your reps can help eliminate the guesswork and scale best practices. Then, reps can open up their CRM, know exactly what they need to tackle, and start each day off at a sprint.

Updating Documents
Data lives in many different forms and places, and when related to a customer it must be updated at each interaction. Things like account plans, mutual close plans, and opportunity notes must be updated in real time. Otherwise you risk your sales teams making selling decisions off of old or outdated information. Unfortunately, when you update a set of data in one location or when someone shares it with you, it can be hard to keep track of where it lives later on. This makes the process of finding and leveraging information time-consuming. Thankfully, real-time productivity tools that connect with your CRM exist so that when you update data in your CRM, it automatically updates in all of your shared planning documents. This way, your sales reps are always equipped with the most updated account plans, and know exactly what steps they need to take to succeed.
Create **HIGH-PRODUCTIVITY PROCESSES through INTEGRATION**

Today’s sales reps are connecting virtually with customers 3 times more often than meeting with customers in person. Unfortunately, the virtual selling process is more time-consuming than it should be, and that is partially due to disconnected processes and tools. Sales reps complete an average of 94 actions every day without ever needing to leave the office – including navigating phone calls, voicemails, emails, and even data gathered on social media channels – and on average, they rely on six different tools to do so successfully.
That means that your sales reps needs to bounce through numerous applications in order to find key information for closing deals. Vital information that can make or break a deal could be sitting in their email inbox, in a pile of sticky notes from the last call they took, or in a document saved on their desktop. And all this switching back and forth between tools could cost you up to 40% in productivity.

As virtual selling and inside sales teams continue to grow in importance, companies must create processes that are efficient and structured to help their teams succeed. Creating processes that are productive from the start can help drive more rep productivity. For instance, if your systems are integrated, your sales reps can quickly access the information they need to prioritize their day – from their task lists, to their customer data, and even insights about their accounts based on what is trending.
in social. At the end of the day, your sales reps should be able to open their CRM, see exactly what customer they need to contact next, have all the context needed for a successful interaction, know what kind of action needs to be taken, and take that action immediately without ever needing to switch screens.

**AREAS TO CONSIDER INTEGRATING TO DRIVE PRODUCTIVITY**

**Communication Tools**
Sales reps leverage a variety of communication tools on a daily basis – like email, voice, and social. They rely on these tools to connect with customers in a meaningful way. In a single customer interaction, they might need to pivot from their email to their phone to their calendar to their note-taking application. By integrating your communication tools, you can eliminate the need to pivot, decrease seller burden, and give your reps a productivity boost.

**Centralized Productivity Tools**
Investing in [centralized productivity tools](#) allows your sales teams to efficiently work a deal and sell as a team. These tools can help teams streamline deal coordination, seamlessly hand off data, and align around business plans. Rather than getting bogged down in email threads, chat storms, and file versions, reps can work smarter when their productivity tools are centralized in a CRM. Reps and sales leaders can access live, collaborative documents – like standardized account plans, templated close plans, and mutual success plans that are connected to the right records in your CRM. Not only will this help reps easily access and rally around that information, but it enables organizations to scale winning sales strategies. At the end of the day, investing in the right tools can build more clarity around your business strategy, improve collaboration across the organization, and drive rep productivity.

**Data Integration**
Information can often exist in siloed systems. Bringing together all the information a sales rep may need into one place streamlines their sales process. For example, giving reps a full view of their prospect’s interactions – whether it be gathering social intelligence through social media platforms, in email exchanges, or at in-person events – can enable them to recognize which prospects are engaged and more likely to convert. If your data and communication exist in silos, you risk keeping critical information from reaching the right hands.
Investing in centralized productivity tools can help teams streamline deal coordination, seamlessly hand off data, and align around business plans.
CHAPTER 5

PRIORITIZE the HIGHEST-VALUE ACTIVITIES for EACH SALES REP

A study conducted by CSO found that only 43.3% of firms receive a “meets or exceeds expectations” for prospect prioritization. Though effective prospective prioritization is a big driver of success, prospect prioritization is incredibly hard. It can be difficult for a sales rep to identify whether a deal is a high-value or low-value deal at first glance, and it requires time that reps may not necessarily have to gather the right information. While they’re working through which leads and opportunities to prioritize, they might already be at risk of losing an opportunity. Luckily, new technology like artificial intelligence (AI) can help your reps through that process.
Imagine being able to leverage your sales history to win more deals. Building artificial intelligence into your CRM can assist with prioritization and make distinguishing a high-value deal a breeze. The right AI tool will analyze your data, predict which leads and opportunities are more likely to convert, and surface that information to your sales reps so they know exactly which deals they should work on. An AI-empowered sales team is a more effective sales team, not only because they have more time to sell but because they’re able to invest efforts into the right deals, at the right time and increase their win rates.

AREAS TO INVEST IN TO HELP MAKE WINNING DECISIONS

Prospect Prioritization
Imagine being able to leverage your sales history to win more deals. Building artificial intelligence into your CRM can assist with prioritization and make distinguishing a high-value deal a breeze. The right AI tool will analyze your data, predict which leads and opportunities are more likely to convert, and surface that information to your sales reps so they know exactly which deals they should work on. An AI-empowered sales team is a more effective sales team, not only because they have more time to sell but because they’re able to invest efforts into the right deals, at the right time and increase their win rates.

Business Strategy and Forecasting
In order to have a productive sales team, you not only need good data; you also need a way to visualize and understand that data. Without an accurate view of your business, your sales teams aren’t equipped to make good business decisions. You need to have real-time visibility into your business along with easy access to comprehensive forecasts. And your sales teams must have access to the data insights that help them close more deals. Unfortunately, the forecasting process can be difficult and often error prone – especially if you’re manually managing that data in spreadsheets. But with the right technology you can easily access data visualizations, simplify the forecasting process, and make better, data-driven business decisions.

Sales Performance
Your management team should have a complete view of how your sales teams are performing and tackle potential issues before they gain traction. Without the right sales performance data, your leadership won’t be able to track individual and team performance, or identify areas for improvement. The right sales performance tracking tools should surface insights so that you can optimize your teams for productivity.
CHAPTER 6

ONBOARD NEW SALES REPS and UPSKILL EXISTING ONES

Proper sales enablement, especially during new employee onboarding, can have a direct impact on performance and job satisfaction. In fact, CSO Insights found that effective onboarding programs not only improve quota attainment by 6.7% but also decrease voluntary turnover. Unfortunately, within 1 hour, reps forget 50% of sales enablement content. In a week, they forget 90%. So, how can we help maximize every sales rep’s selling potential through more effective enablement?

Effective onboarding programs improve quota attainment by 6.7%.
Centralized Learning
As your company grows, learning and enablement programs must scale as well, and that can be a lot to keep track of. A big part of sales enablement and training is getting the right content in front of the right sales teams. More than 27% of organizations have a disparate system for storing learning content, which can make navigating through enablement materials and finding information difficult for sales reps. A centralized learning platform will simplify this process and ensure your reps have access to all the learning materials they need.

Online Learning
Leveraging online tools gives you the ability to create and disperse internal training materials online in a consistent way. You can then create a unified learning experience across your entire sales organization, regardless of geographic location. Ultimately, the right sales enablement tool can make managing learning content a breeze, create a fun and engaging learning process through gamification, and give your sales managers visibility into where their teams are in the learning process.

Data-Driven Sales Coaching
It sounds obvious – coaching and training should be data-driven and personalized to the performance of each sales representative. After all, you could be investing all of your time coaching a sales rep on objection handling when the real reason they’re not converting more leads is that the amount of time between each of their customer touchpoints is too long. As a sales leader, you can leverage sales analytics to gain complete visibility into your team’s performance, identify areas for improvement before they become problems, and ensure you’re fully maximizing your sales training investments.
With ONLINE LEARNING TOOLS, YOU CAN CREATE A UNIFIED LEARNING EXPERIENCE ACROSS YOUR entire SALES ORGANIZATION.
CONCLUSION

There isn’t a clear blueprint for building a productive sales team. But we’ve covered a few ways you can boost your sales productivity in the areas of efficiency, effectiveness, and enablement. Successful sales teams know how to hone these areas to maximize sales potential.

Of course, we know it’s not a simple process. That’s why we’ve created tools that help your sales teams sell smarter and faster. Salesforce helps your reps win more deals with productivity and collaboration tools that maximize every rep’s selling potential. Discover the tools that will give your sales team a boost in sales productivity.

Find Out How You Can:
- Automate low-value tasks
- Intelligently prioritize high-value tasks
- Speed up onboarding and enablement

Using Sales Cloud’s Productivity Tools:
- Sales Force Automation
- High Velocity Sales
- Sales Cloud Einstein
- Social Intelligence
- Quip for Sales
- myTrailhead

SEE THE DATASHEET

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