A CANDDi Guide to optimising the Sales Process

Aligning sales with modern marketing to build better relationships and improve conversions

This guide will take you through

WHY

the traditional sales process is outdated and lacks impact.

HOW

to optimise the sales process with CANDDi at touchpoints along the sales funnel.

WHY THE TRADITIONAL SALES PROCESS NEEDS WHIPPING INTO SHAPE

Marketing theory and practice have evolved at a phenomenal pace over the past 15 years. The modern marketer's typical role and responsibilities are influenced at every level by digital technology, from research and planning, through active campaign management, to evaluation and the feeding of results into the next campaign. Digital technology is driving greater marketing creativity, visibility, intelligence and agility than ever before.

After marketing comes sales. Yet that process –the one that closes deals and drives revenue into the business – often uses techniques that haven't changed in decades. Across all sizes, shapes and sectors of business, too many sales teams are still characterised by a lack of automation and organisation, and, ultimately, an inability to use the information generated by marketing to inform and enhance their activity.

Sales teams can become more informed, more helpful and far more effective through better alignment with the analytics and processes associated with digital marketing.

What's wrong with the traditional sales process?

'Traditional sales' might conjure up the tragic character of Willy Loman from Arthur Miller's Death of a Salesman, travelling the country with his briefcase.

It's an extreme example but the principles hold true. Traditional sales teams are isolating and individualistic. Salespeople in such teams, whether they are cold calling, exhibiting at events or even responding to an inbound enquiry, are generally blind to the potential customer's drivers for making a purchasing decision, any previous contact with the company, pressure points and barriers to their finally making a purchase.

Sure, the salesperson has general awareness of the usual barriers to making a sale (e.g. lack of budget or no perceived need) and may have some basic background information on the customer (if they're attending a particular event, presumably they have an interest or connection to the theme of that event).

But when you consider the volume of potential information out there pertaining to each potential customer, traditional sales teams are going in blind.

Four stages of the traditional sales process

1

New business prospecting

A traditional sales team prospecting for new business will likely focus on a combination of: telesales, trade shows and networking events, and work with the marketing team on outbound email marketing or search engine marketing. These techniques are far from irrelevant, but potentially problematic in that little, if any information will have been gathered in advance about the prospects.

Filtered lists of telesales targets and event attendees can help, and social media platforms like LinkedIn are an ideal tool for salespeople to gather limited additional information once initial contact has been made. Critically however, traditional new business prospecting often has little visibility of whether a prospect has existing knowledge or interest in the product or service being sold. And progression of the sales process relies on a prospect returning an initial call or email.

Qualification

2

Managing the qualification process was once a pen and paper job. Most organisations have, admittedly, managed to go digital – but there's a big difference between a comprehensive CRM system fully integrated with other strands of the business (the ideal) and a disparate set of checklists and spreadsheets (more likely).

The problem with the latter scenario is that it provides little no intelligence on a potential customer's ongoing behaviours – when they're engaging with the sales team, which particular products and services they're interested in at different times, what they're browsing and so on. And this intelligence is crucial to building up a detailed picture of trending behaviour – and knowing when, and how to engage and close.

Even when a business does have a CRM system in place, if it relies on a manual upload of information, then vital data on who is visiting the business's website but not actively engaging with the sales team remains invisible.

3

Account management and existing customer prospecting

Ongoing professional relationships provide plenty of opportunities for repeat business – and any good salesperson will take advantage of this. But traditional sales processes offer little in the way of automation or intelligent decision-making as to the timings and format of reconnections. The timing of making contact with existing customers is based on a best guestimate of when to get in touch – and may even rely on the customer reaching out first.

Closing

4

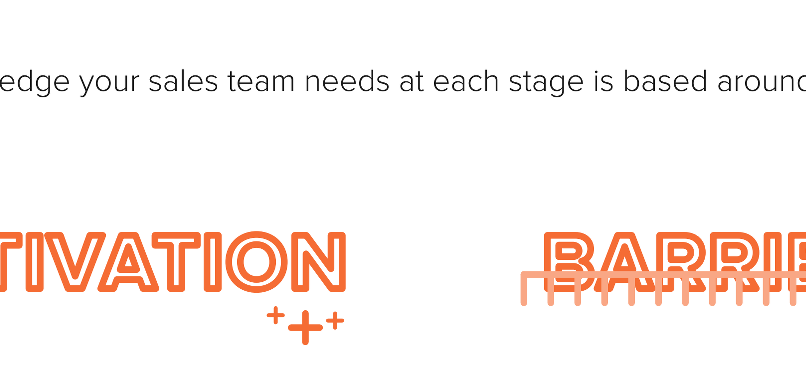
Once they have prospected and qualified, the traditional salesperson must make a decision on when to try to close the deal.

But this is a risky business. The precise time at which a prospect is ready to buy not only depends on myriad factors – but is also the best time for them to be poached by a rival supplier.

Unless your product or service is utterly unique (and be honest here), your prospect is liable to be approached by a competitor during this critical window of opportunity. But how do you know when the window is open?

Traditional sales teams are too often driven to close by nothing more than gut instinct – or worse still, the needs of individual salespeople, rather than the needs of the customer.

HOW TO OPTIMISE THE SALES PROCESS USING CANDDi



The good news is that the traditional sales process just outlined has enormous potential – for any business. Each point along that journey is poised to make use of the vast and sophisticated data available on potential customers, powering more informed and more intelligent sales interactions.

The key knowledge your sales team needs at each stage is based around two themes

MOTIVATION

What is driving your potential customer? What problems are they trying to address? What objectives are they driving to achieve? What is encouraging them to engage with you, and what are they trying to find out?

BARRIERS

What is putting off your potential customer? What concerns do they have about your offering? What might make them postpone or abandon a buying decision? What is turning them off your website, product or service?

This is where CANDDi comes in.

The foundations: listening as well as speaking

To whip your sales team into shape with CANDDi you need the solid foundation of a switched on marketing function, and a website that listens as well as speaks.

Experience has taught us that to make best use of your company's website, its structure should consist of "two ears and one mouth" – that is, it should listen to customers more than it speaks to them. All too often sites comprise one large mouthpiece; telling the customer all about the business but not necessarily what they want to hear.

You can – and should – use your website to collect qualitative data on customer behaviours by asking a series of questions. Asking "can't find what you're looking for?" is open-ended, friendly and often encourages further fruitful dialogue.

CANDDi's contribution

CANDDI operates in four simple steps:

- It **TRACKS** all traffic arriving at your website, building a profile of visitors' interests and engagement over time.
- It **IDENTIFIES** those visitors, down to job titles and email addresses.
- It **SEGMENTS and SCORES** visitors based on activity and behaviour.
- It **ALERTS** the business, ensuring that sales teams have the right informa tion at the right time.

We can map these steps onto the traditional sales process.

Five stages of the optimised sales process

1. New business prospecting

Where traditional new business prospecting begins with little to no initial information on potential customers, CANDDi allows sales teams to launch the process with far more knowledge.

At least one member of your sales team should be assigned responsibility for generating leads through electronic prospecting and categorising. Once granted full access to CANDDi, they should examine your website visitors and ask questions to determine whether each individual is someone appropriate and useful for your business to trade with.

This information can be used in combination with tools like Google Analytics, DueDil, the existing CRM system, and, yes, Google search history, to build up a comprehensive picture of each potential customer. This picture forms an ongoing profile of each individual, so that the history of their engagement with your business remains at your fingertips.

The sales team can thereby differentiate between timewasters and genuine prospects, between people who've arrived at the website and bounced straight off, and those who have immersed themselves in the site for 20 minutes. They can identify whether the sector an individual works in is one you can service. And cold calling suddenly becomes a good deal warmer.

Motivations and barriers

CANDDi gives you sophisticated visibility of website behaviours. Who bounces, and who browses? Who comes back over and over again? How does your website actually work – which pages are more or less engaged with?

This not only provides insight into the motivations of and barriers to customers exploring your website, but also provides valuable analytics for making website improvements, like altering pages that 'turn off' viewers, and getting the pages that excite them front and centre.

2. Qualification

During the qualification process, CANDDi enables a much more in-depth focus on what people do and when – and therefore greater clarity around the best time and place to follow up with a particular website visitor.

It's unlikely, for example, that someone browsing a site at 10pm during their spare time is going to be ready and willing to have a business conversation at 9am the following morning. It is likely that someone who has repeatedly returned to the same precise product page or case study will be most receptive to a call or email focused on that product.

This may not sound particularly sophisticated but it's remarkable how many organisations still employ a blanket approach to targeting website visitors, forgetting that just because someone has visited your website, that doesn't guarantee that they're a potential customer.

Motivations and barriers

CANDDI Capture creates a pop-up form to sit on your website, inviting potential customers to answer some basic questions. A customisable tab appears in the bottom right of the user's screen, with four different types of question available (single answer, multi-choice, small text box and large text box). Interested parties fill in their details, indicating their area of interest or particular query.

We find the question; "Can't find what you're looking for?" really helps visitors open up. Behind the scenes, CANDDi's lead scoring and lead grading mechanisms give absolute visibility of which prospects are most worth pursuing. Seeing who is motivated enough to actually provide you with their details is some of the most efficient prospect qualification you'll ever do.

3. Engagement

Rather than jumping in for a sale, this critical stage involves stimulating ways for the lead to make a proactive move. The engagement stage should see large amounts of electronic data changing hands. Take the time to forward product sheets, video links, white papers or case studies for a particular sector to appeal directly to a prospect's needs. This may prompt a question-and-answer style dialogue, for example about compatibility or viable alternative solutions. Not only does this make you appear considerate rather than desperate, it provides the opportunity for the prospect to volunteer that they aren't ready to make a purchase, or to let you know when they might be.

Track their every move by watching what content they digest, for how long and even at what time of day. The person that engages with a detailed case study between 10 and 11.30am is certainly worth an email or even a phone call soon afterwards.

Timing is absolutely critical. At CANDDi we know that for prospects making an initial visit to our website, who either fill in a form or click through via an email link, there is an 80% chance of successfully booking in a demo if we make an approach within 45 minutes. A day later the chance of converting drops to just 25%. Google's advice is that a prospect should be contacted within the first fifteen minutes of a visit to a website.

This holds true for around 40% of CANDDi customers as this proportion of our client base make a more-or-less immediate purchase. The other 60% may spend as long as six to 12 months gathering information, considering and evaluating before eventually buying only when they feel completely ready. It's easy to forget that relationships are two-way and if prospects are approached at the wrong time they will make it quite clear that they don't want to continue the relationship with you. Likewise, if they try to engage and you don't respond you will lose out to your competition.

CANDDi integrates directly with all major email marketing platforms, enabling you to identify exactly what content different prospects are interested in and seeking to find out more about, and what content prompts concerns or questions – in other words, puts up barriers to a sale. You can learn more about what information you should be highlighting on your website, and what is irrelevant from a potential customer perspective.

4. Account management and existing customer prospecting

Account management is just as critical for your potential customers as your existing ones. Engagement data from your website should be plugged into your CRM system as soon as possible – conveniently, CANDDi integrates directly with the likes of Salesforce, Microsoft Dynamics, Capsule CRM, Sugar CRM and more.

It's clearly critical to send alerts to your sales team indicating that a lead is warm, but it's also vital to let them know when an existing client is repeatedly returning to your website. Records of interactions are also hugely valuable.

By joining together web-based prospects with your CRM you consolidate your sales, marketing and customer service efforts into a single platform, and have far more insight the next time the customer visits your site.

CANDDi's CRM integration provides you with a clear interaction history for every potential and existing customer. What times of the day, month and year are they most interested in your website? What do they read when, and for how long? Your sales team can start to make intelligent decisions as to when it's appropriate to up-sell to an existing customer, contact someone who hasn't been in touch for a long time, and move on to the final stage in the journey.

5. Closing

Intelligent and informed sales teams don't need to rely on gut feelings when making the final approach to close a transaction. Nor should they leave potential customers in the dark at the end of a long period of interaction.

Send appealing content and make sure any engagement is tracked. When a prospect shows interest re-engage with them right the way through to conversion. An informed, considered, but quick-off-the-mark approach will allow your customers to feel that they were responsible for purchasing the product or service which exactly meets their needs at just the right time.