Transform your Business with Seamless Sales Enablement

A Guide for Solving Common Outside Sales Pain Points

Introduction

If your organization relies on a sales force to grow revenue, you know firsthand how difficult it can be to optimize marketing spend and provide a consistent customer experience.

Sellers fight to remain on brand while trying to gain clients. Marketers fight for brand compliance while starving for insight into customer activity. In the struggle, marketing resources are underutilized and the customer experience is compromised.

Stop the madness!

This is the age of the customer. To be a top performer in any market, there must be an empowered sales force working lockstep with marketing who is informed by real insight into customer behavior.

This guide will show you how to identify and remedy pain points facing outside sales organizations.

A distributed sales environment compounds the most common challenges faced by marketers, especially:

- Delivering a consistent, personalized customer experience
- Brand and legal compliance
- Visibility into customer data and preferences
- Alignment between sales and marketing teams to create a complete view of customers

In the Age of the Customer, Personalized Sales is King

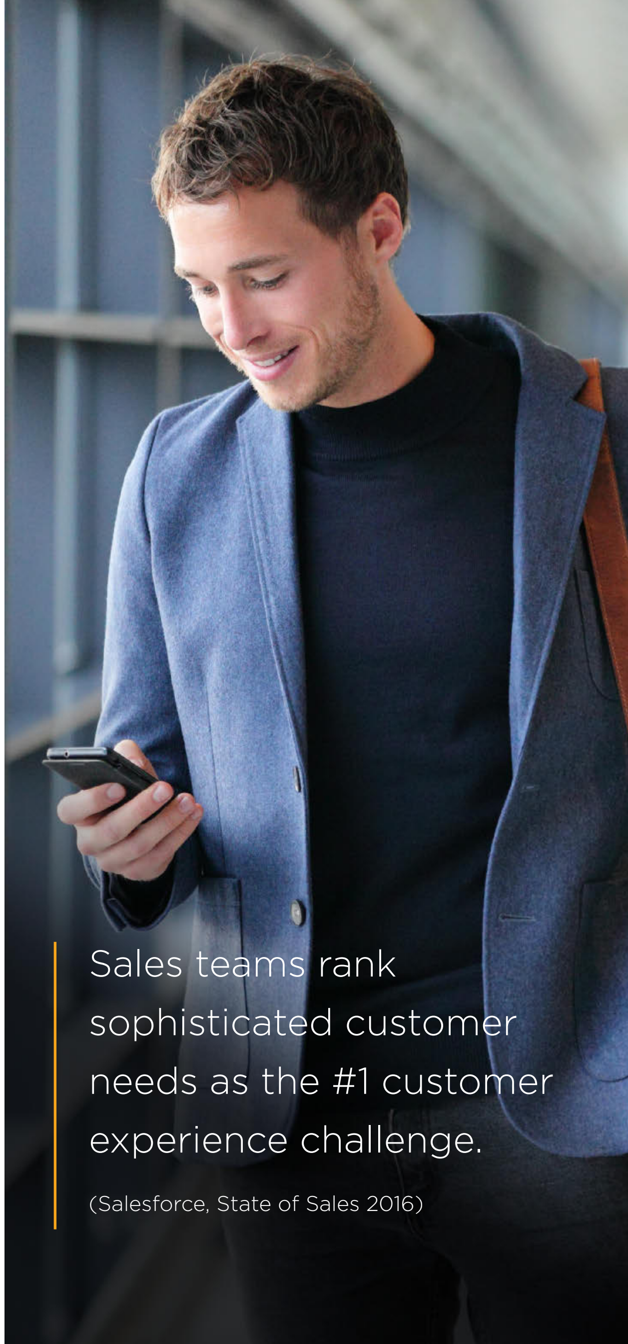
Today's consumers expect to have holistic experiences across channels, with communication that is relevant and personalized for them. In fact, two-thirds of consumers and 72% of business buyers say they are likely to switch brands if they're treated like a number instead of an individual ("State of the Connected Customer," Salesforce, 2016).

The Good News
Your outside sales reps know their audience better than anyone else. Their daily interactions with prospects and customers gives them unique insight into consumer's needs, wishes and preferences. Reps know what content will work best and when.

The Bad News
Reps are wasting precious relationship-building time looking for content. And even worse, they're revising or creating content to make it more personal — which can lead to breaks in brand compliance.

- 65% of sales reps can't find content to send to prospects (roinnovation.com).
- 64% of a sales rep time is spent not selling, but doing administrative tasks (Salesforce.com).

Marketers that enact strict, draconian measures to lock down local marketing efforts will miss out on revenue that comes from highly personalized customer experiences. Instead, give reps more control over the content they use to influence the customer journey.



> Sales teams rank sophisticated customer needs as the #1 customer experience challenge.
>
> (Salesforce, State of Sales 2016)

Empower Reps to Drive Engagement with Personalization

Top-performing companies with distributed sales forces report 18% higher click-through rates with local communications.

(Gleanster, 2014)

Here are four ways to empower your sales team to provide more personalized communications:

1. Create a central home for marketing assets

Free reps up from non-selling tasks, like looking for and creating marketing content, by giving them easy access to all of your content. Housing content in an organized, searchable hub within tools sales reps already use will drive adoption. Sales reps are in-tune with formats customers prefer, so empower them to send assets in any format: email, direct mail, or social posts.

2. Allow structured customization

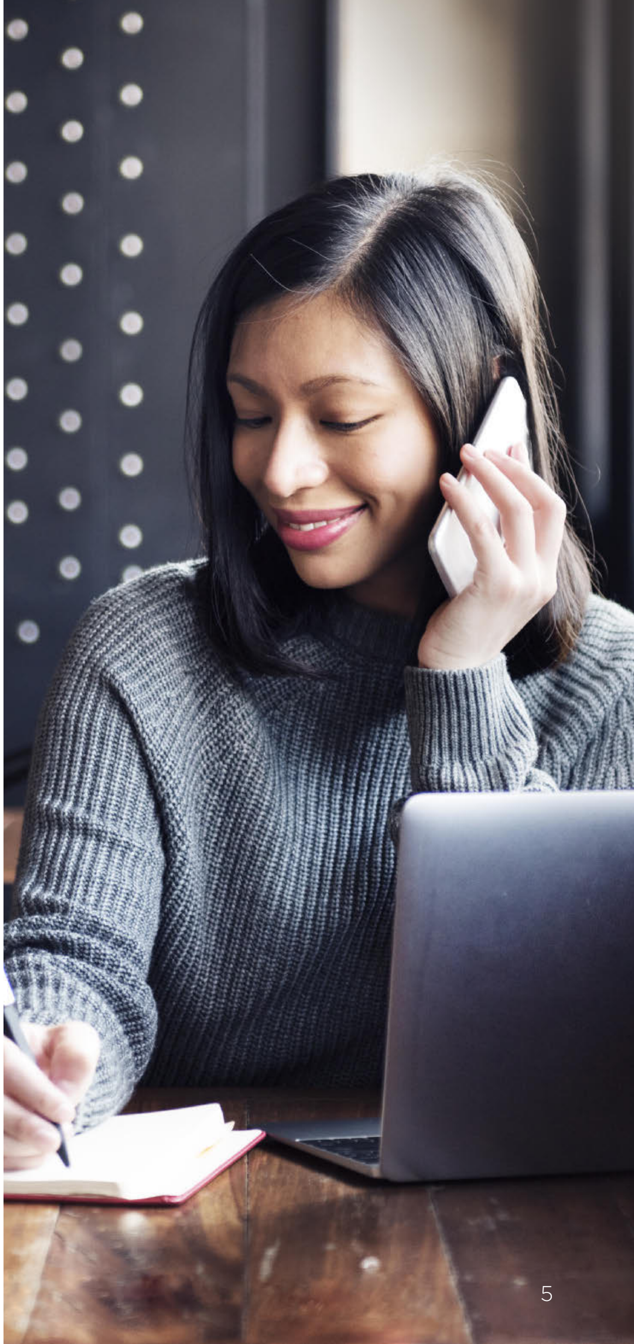
Encourage your sales reps to personalize their local marketing without sacrificing brand consistency or legal compliance. Use marketing controlled templates that reps can personalize. Allow true customization, such as changing images on direct mail, or email copy, based on the customer's buying intent.

3. Let reps add or remove contacts from nurture streams

Sales reps have a real-time pulse into customer communication preferences. Allow them to influence nurture stream inclusion, control the cadence of communications and manage customer preferences. Have a prospect that'll be on vacation? The rep should be empowered to pause that client from communications till they return.

4. Use data to guide rep engagement

Empower reps to send the right asset at the right time — but give them an edge: suggest the most effective content based on customer demographic and behavioral data.



The Cost of Going Off Brand

> Today 75% of the average corporation's value is intangible.
>
> (Forbes, 2010)

The cost of losing your brand is high:

- Misaligned expectations, conflicting ideas and incorrect value propositions will sink customer experience.
- Millions spent in television, radio and digital spend can go up in smoke if you've got a rogue outside sales agent remessaging your brand, wrecking your marketing strategy.
- Poor branding may bring in the wrong leads. With the wrong leads clogging up your sales pipeline, how can you expect attribution to work?

A business's most valuable asset is its brand and reputation.

Brand and legal compliance are areas where outside sales can cause havoc, and potentially cost your organization huge fines and penalties, with rogue behavior.

Brand compliance is not a top-of-mind concern for outside sales. They already spend too much of their time on administrative tasks, so making sure they've got the most current marketing message, style guide, or creative isn't their priority.

Outside sales teams are the riding pulse of your market. They know how to close deals in the field, they know to whom they're selling, and they're more than willing to change messaging, or recalibrate your brand to make a close.

But months later, when the customer experience is in chaos and bidirectional communication with the customer is suffering, long-term gains will wither for the faster close.

For organizations in industries that require legal compliance, the cost of failure can be much higher and more immediate. Violating patient-provider confidentiality laws or financial regulations can slap an organization with serious fines, or worse. The infraction may be as slight as mishandling customer communication preferences.

Take Compliance Out of Sales' Hands

They'll thank you later.

Staying on brand isn't easy when you have a distributed sales force. The core solution is keeping communication open between sales and marketing.

1. **Work together with outside sales to develop brand guidelines**
   Focus on creating actionable steps that reps must take to enforce your brand. Brand identity is at the core of your mission statement — it's your north star. Communicate your north star across every department and to every role.

2. **Make brand guidelines easy to find and easy to understand**
   If they're not simple to implement, outside sales teams will likely toss the guidelines.

3. **Create and distribute marketing-controlled content**
   Lock down the brand-sensitive and legal parts of marketing while allowing sales reps to personalize, customize and edit content so it resonates in their market.

4. **Integrate content access with ERP software**
   If your organization uses ERP management software to keep legal compliance intact, find ways to connect it to your content libraries. Content should be accessible based on department, title, role or other identifiers.

Keeping your brand consistent is a team effort. Don't fight the independent nature of sales. Instead, set them up with the right content at every stage of the sale.

Incomplete Customer Data Harms Everyone

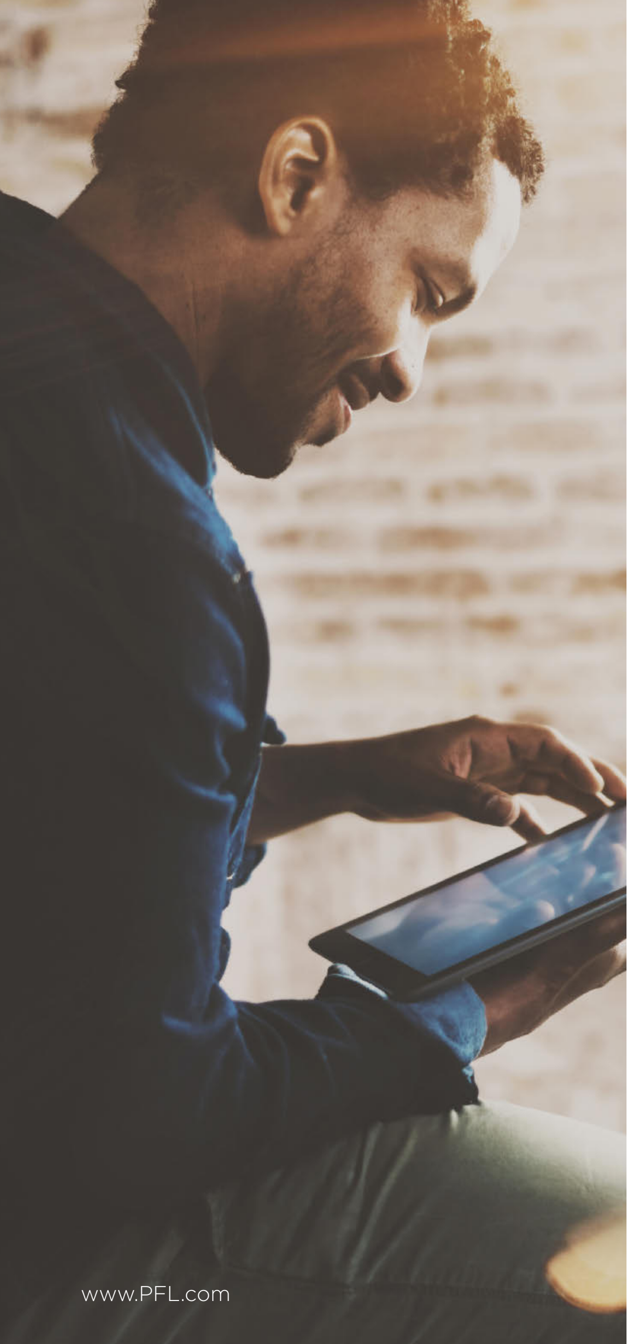
In many ways, the outside rep is the customer's entire experience of your organization. The outside rep often markets to prospects, nurtures leads, closes deals, manages customer service and post-purchase efforts and follows up with customer success.

Outside sales has access to data that is often siloed away from marketing, such as how sales reps use marketing resources, how customers engage with those resources and how marketing contributes to success. This visibility problem ranks as the number one concern for top performing organizations (Gleanster, 2014). But the problem goes deeper.

- Outside agents can't predict what is coming from marketing, leading to confused lead nurturing and long term strategy.
- Data that does arrive isn't structured, so it can't play well with other technologies.
- Without a single source of record for outside marketing efforts, the data set becomes error prone and makes it difficult to honor customer preferences.
- Poor view of the customer means your most powerful marketing tactics — such as personalization — are crippled.
- Customer experience is spoiled by patchworked, ineffective or duplicated marketing efforts.

Short version: incomplete understanding of your customers cripples sales reps, crushes marketer's dreams and harms deals.

> Gain a single view of the customer and replicate that view across all departments and roles. This is a critical concern for sales professionals, in fact 68% cited it as a top concern.
>
> (Salesforce, State of Sales Report 2016)



Leverage Sales Data for a Complete View of Your Customer

Building a complete view of your customer means sharing data from sales reps in the field across the organization. Make it easy, make it automatic and make it trackable. The key is capturing critical insights without squashing sales rep's precious time with more admin tasks.

- Increasing the adoption rate of reporting tools is the single most effective way to open up visibility. Use a solution that's already integrated into your CRM and marketing automation.
- Measure content performance, regardless of distribution channel (email, direct mail, social), by giving reps access to send the assets from their CRM.
- Make sure the solution runs automatically and in the background. Adding one more task to a sales' rep's plate won't help.
- Structure and deliver data to the right teams so intelligent reporting is possible. Don't reinvent the wheel: integrate this complete view of the customer into existing reports.

A shared view of the customer is a huge step forward for aligning sales and marketing teams, leading to a more productive and collaborative selling environment.

Top performers are 34.4x more likely to create omni-channel customer experiences and 13.7x to integrate their business systems, maximizing the use of customization, value add and trigger-based communications.

(Salesforce, State of Marketing 2015)

Bringing Sales and Marketing Together

The Holy Grail of Sales Enablement

For top performers, collaboration between both sales and marketing is critical. In fact, those top performers are 83% more likely to have sales and marketing completely aligned (Salesforce, 2017). Alignment is critical for achieving real, tangible sales enablement.

All too often the benefits of sales and marketing alignment are slanted toward the benefits for marketers, but for sales reps the result is a powerful new paradigm where they are empowered to engage with customers in a more open, responsive way.

Imagine selling with the full power of personalization at your fingertips, without worrying about brand or legal compliance and with the security that you're going into the deal with a complete understanding of the customer.

Knowing the rest of the organization is working from the same baseline is a force multiplier for sales. Sales enters the deal armed, informed and free to make the right decision at the right time.

At the same time, marketers should have insight into content performance, so they can shape strategy and continually arm sales with the best assets.

So how do you get to this Holy Grail of sales enablement?

Companies with strong sales and marketing alignment achieve 20% annual growth rate. Companies with poor sales and marketing alignment have a 4% revenue decline.

(Aberdeen Group, 2015)

Align Sales and Marketing with Technology and Old-Fashioned Elbow Grease

New, innovative technologies are entering the sales space that blur lines between marketing, business intelligence, sales and service. That's a good thing, once you figure out how to use that tech. But until the sea change is complete, old-fashioned elbow grease and commitment to a culture shift is just as important.

1. **Develop processes together.**
   Don't expect the other team to care about, let alone implement, your ideas if they weren't involved in their development. Developing processes together is the fastest way to align teams and individuals.

2. **Design goals that work for both teams.**
   Everyone wants the same outcome: growth. The arguments circle around what growth means. When you're drafting goals for the week, month or quarter, make sure at least one in four of your goals are shared by both teams.

3. **Use the same tools.**
   When possible, get both teams on board with the same tools. If your sales reps are living in Salesforce everyday, find a way to get that data to play nice with marketing automation. Conversely, get alerts and messages based on marketing programs to make an impact with sales. The tech's out there to bridge the gap.

4. **Share data in real-time.**
   The age of the customer is also the age of data-driven everything. Sharing customer data across teams results in real, actionable insights. Insights that turn into true sales empowerment!

> Sales and marketing misalignment costs businesses $1 trillion each year in decreased sales productivity and wasted marketing efforts.
>
> (Hubspot, 2015)

How to Empower Field Sales Teams

This is the age of the customer — they engage on their terms and reward (or mercilessly punish) organizations based on how well they integrate into the new era.

Empowering outside sales to deal with this new world takes many forms — from tech solutions that automate, streamline or just remove some administration processes, to restructuring teams and changing sales processes.

But in the end, sales empowerment is about getting out of sales' way and letting them build relationships.

- **Make content easy to find and use.**
  Keep your content in one space, easily accessible by sales reps no matter where they are. Let marketing shoulder the responsibility for keeping content up to date and on brand.

- **Put control in sales reps' hands (when it matters).**
  Let sales reps personalize content as needed, from changing emails, to crafting specific direct mail messages. Balance openness with locked content so sales reps can't slide off brand or out of compliance.

- **Create a full view of your customer using outside sales' amazing insights.**
  You'll need a tool that bridges the data gap between outside sales and everyone else. Choose a solution with a high adoption rate. The more the tool is used to grab and store data, the more structured data is available for use throughout the organization.

- **Open up true multi-channel outreach.**
  Customers want choice when it comes to how they engage. Trust your sales reps to know what customers want, and give them access to every channel. Email, PDF content, video, social media — whatever it takes. Put it all in your reps' hands.

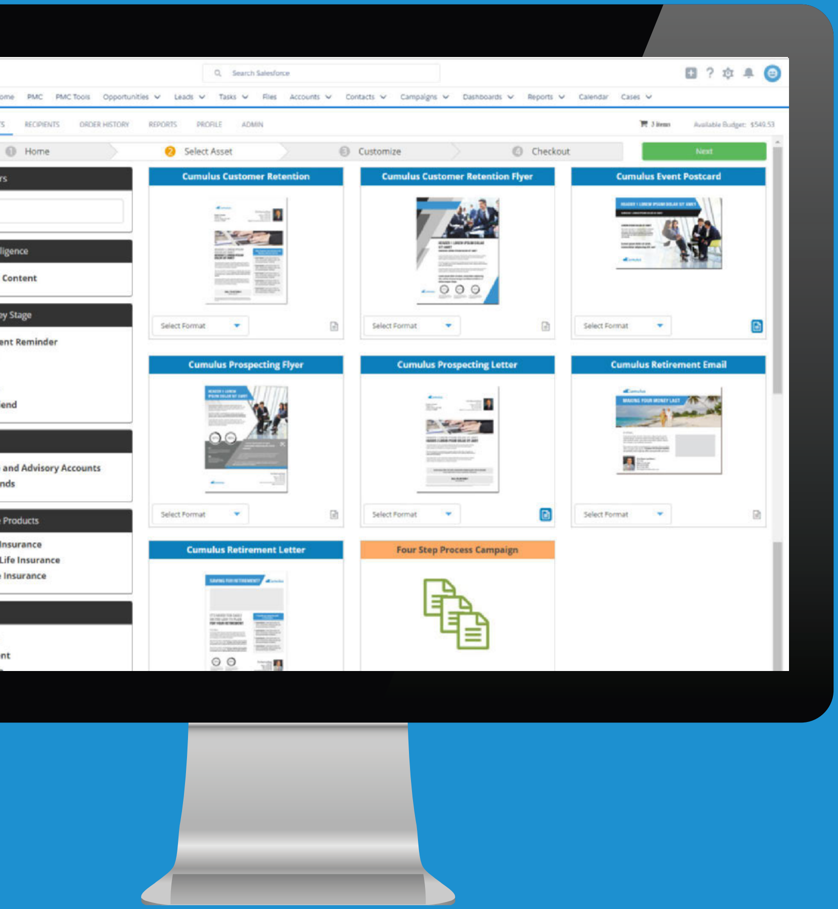
Arm Field Reps with the Resources They Need

PFL offers a fully native Salesforce solution for outside sales. We call it **Personal Marketing Center®**. It's designed from the ground up to empower field sales teams to engage smarter and close faster, while sharing their unique customer insights across the entire organization.

- **Brand Control**
  Give reps access to customizable, marketing-approved templates. Keep your content updated, on-brand and easily accessible.

- **Personalization**
  Empower reps to personalize, manage and execute their own local marketing. Personalization is a one-click solution for sales reps.

- **Visibility**
  Personal Marketing Center® fuses Salesforce and Marketing Cloud to create a single view of the customer. This helps marketing and sales provide better customer experiences and see how content and outreach efforts are performing.



- **High Adoption Rate**
  Because Personal Marketing Center® lives entirely within Salesforce, it boasts a 98% adoption rate with enterprise level organizations.

- **True Omni-Channel Marketing**
  Deliver a cohesive customer experience across any channel. Reps can personalize and send emails, dimensional mail and social posts to prospects and customers. They can also order promotional items, business cards, and collateral for use at field events — all with a single click from within Salesforce.

- **Content Hub**
  Personal Marketing Center® is a central location for all of your marketing content, but it goes further. The solution constantly monitors how content influences closed deals and suggests the best content, at the right time, giving your sale reps an edge.

When Organizations Use Personal Marketing Center They See:

6x
Higher adoption

Best
Ever average revenue per user in the first year

30%
Reduction in marketing waste

LEARN MORE

PFL

ENGAGE SMARTER. CLOSE FASTER.
DRIVE RESULTS.

PFL is a marketing technology company that provides sales enablement and marketing automation solutions, as well as printing, mailing and fulfillment services. Personal Marketing Center® is a single source that empowers sales reps to communicate more effectively with their customers with personalized content while maintaining brand compliance.

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