THE INTRO – STARTER KIT

GUIDE TO RUNNING A SUCCESSFUL TRAIL WITH SALESPULSE IN YOUR ORGANIZATION

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STEP 1

IMPLEMENTATION & CONFIGURATION

GETTING STARTED

Getting started with Salespulse requires installation and configuration of the app from the AppExchange. Follow the instructions in these 2 guides. It takes about 30 minutes

Click here to get the Pre Installation Guide
Click here to get the Installation and configuration guide

DECIDING WHAT QUESTIONS TO USE

?

You can start off by using any of the pre-made templates that you find under the Tab Surveform or create your own questions. The key thing to think about is:

- What is the most important information I need to uncover from my prospect in the sales meetings?
- How can I try to understand where my prospect are when it comes to moving forward with our offering? Is he missing any info, was it interesting for his industry, his challenges.
- What information do I need to get, in order to evaluate my sales reps ability to execute our sales strategy with our prospects

These are the questions that should be the basis of your thinking when it comes to defining what questions to use in your Salespulse evaluation form

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STEP 2

INTERNAL ENABLEMENT

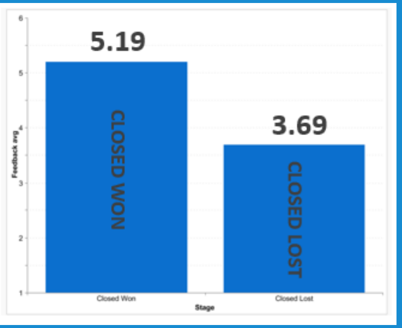
A SUCCESSFUL PILOT

Running a successfull pilot with Salespulse requires getting sales reps and sales management to understand how to use it and what value it will provide to them. Use the attached training slides to train and motivate your sales reps

Click her to get the Internal training slides

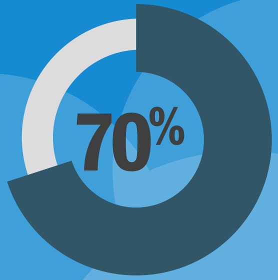
WANT TO KNOW EARLY WHICH CASE YOU ARE LIKELY TO LOOSE?

Statistics show that opportunities where you get an average feedback score below 3.69 is most likely to end up Closed lost



LIKELY TO CLOSE WON

Statistics show that prospects who provide feedback after the meeting is 70% more likely to close



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STEP 3

BEST PRACTICE USE FOR SALES REP

HOW TO GET PROSPECTS TO REPLY?

Making the request for feedback personal in the meeting or the sales call is crucial to getting a good response rate. We recommend using this phrase:

«We are commited to making sure we are relevant to you and that we can provide the right advise and value to you in the future, therefore after this meeting you will get a short survey asking a few questions about this meeting. It will only take 1 minute to reply and I would really appreciate if you could help me out with this»

Important to «Request feedback» immediately after the meeting – Automatic or with the push of one button

HOW SHOULD SALES REPS USE THE FEEDBACK?

« I follow up immediately any comments from the prospects to reconnect again. This is some of the typical comments I get “I did not understand how this could be applied to my industry” , “I wanted to see pricing and terms and conditions” , “This process is sponsored by the Operations team” »

«I closely follow the feedback dashboard and the KPIs from my prospects. I try to identify what made the prospect give me such a good/bad feedback and try do more/less of that going forward»

« I need to makes sure all my opportunities reply next steps agreed – if not then I reconnect with them quickly»
« If my prospect does not reply to my feedback request I need to re-engage with them to get their interest up, or else I know they will close lost»

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STEP 4

BEST PRACTICE USE FOR SALES MANAGEMENT

WHEN DO I USE THE FEEDBACK DATA AND HOW OFTEN?

The feedback data from prospects are real-time so quick reaction is necessary and brings most value. Sales management can go through the sales reps feedback reports/dashboards in their bi-weekly coaching sessions and look through the status of the reps KPIs and the quantitive feedback on opportunities to plan next steps

HOW SHOULD SALES MANAGEMENT USE THE FEEDBACK?

« Looking through the feedback data on opportunitites I have now much more transparency in my sales teams opportunitites. I can ask more qualified questions to my sales reps on their status and next steps with that prospect. This improves the accuracy in my forecasting »

« My bi-weekly coaching sessions are now easier because we can together discuss and look at the qualitative feedback on his performance and not just the financial KPIs on their performance »

« I can look at individual training needs based on my sales reps true strengths and weaknesses, simply by looking at the KPI reports»
«In case something goes wrong with a prospect I get notified on the watchllist so I can immidatly reach out and try to fix the relationship»

THERE IS ONLY ONE GOAL THAT MATTERS IN SALES ?

Measuring the increase in revenue might be difficult in a 30 day trail. Another imortant KPI you can track to see increase in performance over the trial periode is hitrate/conversion rates, NPS(week by week) and Overall Sales performance KPIs

You should also evaluate the trial asking for Sales reps feedback on their increased motivation and shortened time to re-connect with prospects with this new real-time information

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STEP 5

ROI EVALUATION

HOW MANY ADDITIONAL DEALS DO YOU NEED TO CLOSE IN ORDER TO GET A POSITIVE ROI PR SALESREP USING THIS ?

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