FOCUS REPORT:

The High Cost of Low-Tech Leadership

The High Cost of Low-Tech Leadership

Overall performance suffers when those in leadership roles aren't sufficiently trained

BY PAUL NOLAN

Ashley Deibert says when she lands in a new marketing leadership role at a company, she spends the first 90 days assessing three factors that she believes are critical to peak performance:

- What the current levels of marketing activity are (digital ads, content marketing, etc.)
- Whether the right technology is in place
- Whether her team members are positioned properly to maximize their skills

Deibert took that approach after starting her job as chief marketing officer at Piano Software, Inc., last June. The company provides a platform for digital publishers to help them monetize content and create reader revenue through subscription models.

By the time Deibert's first-quarter assessment was complete, it was clear to her that the company's marketing and sales technology needed an overhaul. Within months, she added 6sense, an account-based marketing platform; she switched the company's CRM to Salesforce, which she was more familiar with and which she felt was an upgrade; she added Outreach, a sales engagement tool; she added a data cleansing tool to enhance their customer database; and she added UberFlip, a content marketing platform designed to improve the experience of self-educating prospects. Later in the year, understanding how the pandemic was changing every company's marketing strategy, she purchased software that improves the quality of hosting virtual events and making virtual presentations.

Deibert said she made these investments confident that each of them would help improve Piano's bottom line. At 38, she is a decade and half into her marketing career. Although different

members of her team have greater in-depth knowledge about the capabilities of the technology that she added, she says she has a strong understanding of how each component strengthens Piano's sales and marketing processes.

Deibert speaks with the confidence of a leader who digs into the details of marketing and sales technology in order to make smart decisions. She says she began assessing Piano's marketing technology (martech) stack — and the willingness of company leaders to invest in upgrades — while she was still interviewing for the CMO position.

"I discovered when it came to the internal martech stack, the tools were rudimentary for what we needed as a scaling organization," she said. "I feel like they were waiting for someone like me to come along and figure it out."

Ashley Deibert overhauled Piano Software's technology solutions when she became their chief marketing officer last year.

A Dearth of Digitally Savvy Leaders

Deibert is an anomaly, according to a 2020 study of top management teams. A report on the study was published in a recent issue of MIT Sloan Management Review. A survey of C-level executives and leaders of functions at 1,948 large companies globally found that only 7% of companies have digitally savvy executive teams. The report states that among the companies studied, the average top management team has nine members. Overall, only 17% of individual team members are digitally savvy.

"Digital savviness is an understanding, developed through experience and education, of the impact that emerging technologies will have on a business's success over the next decade," the report states.

This dearth of technological know-how has consequences, the report states. Companies with executive teams in which half or more of its members are digitally savvy have 48% higher revenue growth and higher valuations (share price to sales ratio) and 15% higher net margins than the rest of the companies studied.

It's not even necessary to hit the 50% tech-savvy threshold to reap some performance gains. Incremental advances in

How Digitally Savvy Top Teams Drive Performance

The most digitally savvy top teams are far more likely to produce results through innovation and empowered workforces than the least savvy teams.

		Top 25% of Savvy Top Management Teams	Bottom 25% of Savvy Top Management Teams
RESULTS	**Innovation** (% of revenues from new offerings in the past three years)	59%	18%
	% of revenues from **cross-selling**	53%	15%
	% complete on **transformation**	69%	30%
PRACTICES	**Rapid learning** (for example, test and learn, minimum viable products, sharing lessons, evidence-based decisions)	80%	25%
	Modular, open and agile	80%	33%
	Automated decision-making	80%	35%
LEADERSHIP	Moving from **command-and-control** to a **coach-and-communicate** orientation	83%	28%
	Creating a **digital culture**	85%	30%
	Holding people **accountable**	85%	41%
	Encouraging **innovation**	85%	30%

SOURCE: MIT SLOAN MANAGEMENT REVIEW

digital savviness also pay off. The study found that for every 10% increase in top team digital savviness, there is a 0.4 percentage point increase in profitability and a 0.7 percentage point increase in revenue growth, compared with the industry average.

Head of marketing is one of five management roles the study identified as having the strongest statistical link to high performance. The others are CEO, CFO, head of corporate communications and investor relations, and head of compliance and legal.

Sales and Marketing Leaders Lag

Perhaps not surprisingly, the study found that the leadership roles with the highest percentage of digitally savvy workers were chief technology officer (47%), chief information officer (45%) and unit president/geography president (35%). All other leadership roles had a digitally savvy rate of less than 25%, including head of marketing (23%) and head of sales (15%).

"Being digitally savvy means challenging business assumptions, predicting and influencing the financial impact of business and technology decisions, and understanding the road map and prioritizing investments to become future ready," Arno Daehnke, CFO of Standard Bank Group, Africa's largest lender by assets, told *MIT Sloan Management Review*.

"There is a line to be drawn regarding the expectations and the necessity of the level of tech savviness with different levels and roles," Deibert told *Sales & Marketing Management*. "I've always been a pretty tech-savvy leader, but there are members of my team who go much deeper into these platforms than I do. However, I don't feel like I should be commanding that we use these technologies to drive our strategy if I, at the core, don't understand what they do. I don't understand how I could effectively lead my team if I don't have some sense of how to work the systems that we're using to achieve our goals."

Teams With Digitally Savvy Leaders Operate Differently

According to the study, digitally savvy top teams are quicker to implement innovative solutions, thereby separating themselves from competitors.

"Knowledgeable clients get it. They want to run. They're willing to experiment. Maybe the experiment doesn't work, but you learn from it. Things get off a whole lot smoother," said Frank Strong, founder and president of [Sword and the Script Media](#), an Atlanta-based content marketing consultant that works primarily with B2B technology clients.

In an interview with SMM, Strong recalled having to tutor a CEO on the difference between paid search and organic search when the executive was upset about competitors appearing above his business on Google. "That's fine as a consultant, because it's a learning moment that endears me to that top executive. But for in-house marketing teams, it's frustrating. You can't even have a basic conversation about marketing if the team members don't understand the same lexicon."

Developing Digitally Savvy Leaders

Now that you know that boosting the technological savviness of a leadership team produces quantifiable bottom line results, what steps can you take to get there? The *MIT Sloan Management Review* report recommends these steps:

Have a candid conversation — The CEO, chief human resources officer and the CIO should have a frank discussion about their leadership team's digital savviness. Identify the digitally savvy leaders on the team and those who need training. Identify someone who will take the lead on bringing team members up to speed digitally.

Start with the key members — Upskilling five roles — CEO, CFO, head of marketing, head of corporate communications, and head of compliance and legal — has the most impact on company performance. Many companies use peer networking to start spreading digital savviness.

Expand the effort — Once these key leadership roles have become more digitally savvy, the goal should be to get at least 50% of your top team members to the same place.

Pursue the 10 performance differentiators — See the chart on page 3 for the factors that distinguish the high-performing companies that were studied. Those key areas will guide you on where to invest your digital transformation dollars.

When marketers spend as much time making the case for doing their job as they do actually doing their job, that is the antithesis of agility, and it drags on business results, Strong argued.

"Marketing these days isn't just about marketing," he added. "It requires considerable time to educate executives. Often, that means making the business case for a marketing program over and over. It's every bit as much about managing up as it is about identifying and building markets. The best marketing and PR talent won't stick with such leaders for long."

Numbers Don't Lie

According to the MIT study, the companies in the top quartile generate a staggering 59% of revenue from innovations introduced within three years compared with only 18% for those in the bottom quartile of companies.

Additionally, those companies studied that were in the top 25% of savvy top management teams generated 53% of revenues from cross-selling compared to 15% for those in the bottom quartile of companies. (See the chart on page 3.)

Review Deibert's decisions regarding technological investments and it becomes apparent they align almost perfectly with this statement from a 2019 *European Business Review* report entitled "Four Pathways to 'Future Ready' That Pay Off": In a digital world, innovation and business transformation aimed at meeting more of customers' needs and earning a larger share of their wallets are early indications of better financial performance.

To Strong's point regarding a willingness to experiment and learn from both positive and negative results, the MIT report found that digitally savvy top teams achieve their industry-leading results in part by creating rapid learning cultures that are typified by test-and-learn experimentation, minimum viable product releases and evidence-based decision-making.

Getting There

The drive to have a technically savvy leadership team doesn't have to be initiated from the top down, but it does have to be supported by the CEO and other key decision-makers. As Diebert mentioned, she sized up the interest on the part of

Piano Software's executive team to invest in technological upgrades as they were determining if she was a good fit to lead that charge.

"In my experience working for a range of companies of different sizes and at different stages of development, there is a culture around technology that leads to the potential of having technically savvy leadership," Diebert said. "I've worked in organizations where it almost felt like there was an allergic reaction to buying so much tech and a misunderstanding of why they should invest so much money in it."

Companies that want to improve their digital savviness in leadership roles should start with an honest assessment of which leaders are sufficiently poised for success, and who needs upskilling. Start with the CEO, move to the five roles mentioned earlier that have the most impact on a company's performance, and expand the effort from there. (See sidebar on page 4.)

A company's C-level executives and top leaders don't have to be the most proficient in any tech solution used by their company. However, the increasing importance of technology in a company's overall performance requires that those at the top have a holistic understanding of what technology is required for peak performance as well as the ability to determine whether the technology they have in place is being fully utilized. **smm**

You May Have Tech Solutions Waiting To Be Deployed

Ashley Diebert says in continuously assessing her company's technology needs, she often discovers that a solution doesn't have to mean investing in something new. Many fixes can be accomplished by expanding the knowledge of what your current tech stack can do.

"We put in all the core foundations we needed to run the business. Now, we're getting more granular in terms of what we're looking to add to it, as well as expanding our use of the technology platforms we have in place.

"For example, when we needed better ways to get our entire company information around our sales enablement library, we figured out the content tool we use on our site for prospects can also be used as an internal tool to disseminate information to the right people based on what products they are selling. I could have gone outside and found another tool that did that, but I'd much rather expand my use with a technology platform we've already invested in."

Lagging in Tech Knowledge Has Far-Reaching Impact

We asked how much of a problem it is when those in B2B sales and marketing leadership roles are not technologically savvy. Here are some comments we received.

People management skills are more important

"Even a nontechnical person can be a successful manager if given the right set of management skills. Technical competency in the department's area of expertise is indeed an asset. However, being tech-savvy doesn't conclude that a manager has to be able to do the actual work step by step. He just needs to know the basic and the overall understanding of the technologies being used to meet business needs, and how to utilize that in projects and departments. Marketing leaders can inspire their team even if they are not equally or more adept technologically as long as they have a clue what the department is about and have important skills, such as communication, can set and manage expectations, trust and respect."

— Ryan Smith, founder, Ant and Garden Organic Pest Control

Vision drivers must be tech savvy

"C-Suite executives provide the vision for company growth and forward movement along with the vision they need to properly understand how to tie their digital efforts in with their vision. Otherwise, the C-Suite relies on their tech-savvy teams to interpret how to achieve that vision with their tech tools. Those views may not always align with the C-Suite, and it leaves room for potential errors. Beyond that, having a full view of the functional capabilities of tech allows the C-Suite to understand which visions and goals are achievable, and which currently aren't.

— Devin Johnson, CEO, Kennected

Your competitors are on top of tech trends

"Businesses thrive on new approaches, and, like it or not, the large majority of new ideas these days emerge from tech. Marketing managers and team leaders must know their material when it comes to new business trends and the technology behind them. If they don't your business risks missing out on new developments that I can guarantee won't be missed by your opponents."

— Caroline Lee, co-founder, CocoSign

A must for marketing leaders

"As a marketing leader, your job is the strategic deployment of this technology, which requires an intimate understanding of how it works. As the person with the most insight into the business function, a marketing leader needs to tell their employees how the technology will be used and to what end, including how it integrates with other organizational processes and workflows. Without a superior understanding of the tech, inspiring employees to fully exploit it will be next to impossible."

— Sebastian Schaeffer, CTO owner, dofollow.io

Missing the forest for the trees

"I find that most sales management spends too much time worrying over individual customers, deals or sales reps when, very often, the friction is in the sales process or technical. Really getting under the hood of the sales process and then the CRM is absolutely critical for a pipeline to flow."

— Casey Halloran, CEO and co-founder, Costa Rican Vacations

10 Email Marketing Tips to Boost Sales

Email marketing isn't complicated anymore. With a few simple and effective methods, you can significantly increase your sales and revenue in no time.

BY ROBERT DUKE

WHY Email Marketing?

More than **34%** of people use email worldwide.

About **196 billion** emails are sent out every day.

Out of this, **109 billion** emails are business-oriented.

Yes, Emails are Popular!

How to Use Emails to Boost Your Sales?

Tip #1: Segment. Segment. Segment

Divide your email list into smaller and more targeted sub-groups. It lets you promote your products and services in a personalized manner.

List segmentation increases email open rates by **39%**

It is proven to improve revenue by **760%**

Tip #2: Maintain Email Consistency

Don't hesitate to send out emails to your list weekly or daily to build and nurture a list of loyal subscribers. Doing so will result in a higher number of sales.

39%   73%   61%

39% of marketers send emails every day, and **73%** do it weekly

61% of subscribers prefer receiving an email at least once a month

Tip #3: Not So Shady Subject Line

The subject line needs to be transparent and not gimmicky. It helps you build a trusting relationship with your subscribers so that they open your emails again and again.

The subject line with **3** words has the highest engagement rate of **21.2%**

21.2%

Personalized subject lines see a **37%** increase in unique open rates

37%

Tip #4: Short & Sweet Messages

Your emails should be clear and concise so that the receivers get the message and act on it. Keeping your message simple receives a better response from the campaign.

20 Lines

Emails with **20** lines of text received the highest click-through rates

36%

The open rate of emails written at a **3rd-grade** reading level was **36%** better

Tip #5: Personalize Your Messages

Personalization helps you create a unique experience for your prospects, thereby making them feel special, and increases their chance of doing business with you.

Personalized emails can deliver **6x** higher transaction rates

An email with personalized content received the highest open rate of **18.8%**

Tip #6: Make Your Email Interactive

Interactive elements are one of the hottest email design trends. Using interactive features can drive more conversions while entertaining the recipients.

73%

Interactive email content upsurges the rate of click-to-open by **73%**

300%

Adding videos to your email will boost click rates by **300%**

Tip #7: Mobile-Friendly Emails

Mobile-friendly emails ensure that your messages look great on devices of all screen sizes. If it isn't mobile-friendly, you could fail to engage your subscribers and drive sales.

68% of email marketing campaigns are opened on a mobile device

89% recommend a brand after a positive experience on the mobile

Tip #8: Abandoned Cart Email Series

Send an abandoned cart email series when buyers leave your website without completing their purchase. You can offer discounts or free shipping to make them buy from you.

45%

Abandoned cart emails boost nearly a **45%** open rate

50%

50% of the leads make a recovered purchase back on site

Tip #9: Co-ordinate Paid Ads with Emails

If you could afford to advertise, try making your emails and advertising related. By thinking 'outside of the inbox,' you can build conversion opportunities quickly.

22% were more likely to purchase when Facebook ads are coordinated with emails

You can get **10x** more out of email marketing with PPC

Tip #10: Dedicated Page for Your Campaign

You must give equal significance to where you send your subscribers from your email. To get good conversions, create a dedicated landing page to direct your email traffic.

Businesses with **10** to **15** landing pages can increase leads by **55%**

A landing page that targets correctly can increase conversion rate by **300%**

There you go!
These tested email marketing tips will send your sales soaring.

Robert Duke is a Marketing Manager at Blue Mail Media. With over 10 years of experience across B2B Marketing, Lead Generation, and brand marketing, Duke has helped several SMBs and large-scale organizations to elevate their marketing strategies.

Allego elevates sales performance by combining learning and content into one application, streamlined for the rapid pace of business.

Enablement has changed. Increasingly educated buyers, a larger and more diverse group of stakeholders, rapidly changing market conditions, and tougher competitive pressures create unique challenges for today's go-to-market organizations. Relying on conventional approaches to training and content will not produce measurable changes in behavior and results. Organizations need to infuse learning, content, and collaboration into the flow of work for every salesperson.

With Allego, sales organizations:

- Rapidly share content, knowledge, and best practices
- Drive greater collaboration between Sales and Marketing
- Activate sales content with learning and coaching
- Maximize sellers' time with fast, simple mobile experiences
- Gain visibility into seller competencies and content effectiveness

RESULTS

Shorter time-to-productivity for onboarding and launches

Broader content adoption and strategic use

Higher win rates and faster sales cycles

Greater visibility into competitive readiness

Reduced training costs

Half a million professionals use Allego to share, access, and utilize knowledge and content.

"We've been challenged in the past on having multiple different systems for reps to access what they need. Being able to bring our learning programs and content management into one platform offers efficiency for all."

*Gerry Hurley
Senior Director of Enablement, Tripadvisor*

www.allego.com

781.400.5671

salesinquiry@allego.com

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Virtual Selling Is Now Simply Selling

BY DAVID DEMING

More than a year of working from home has shown that online video meetings and remote demonstrations work just fine most of the time for business-to-business sales. Many customers, it turns out, actually prefer the virtual approach.

A recent global Bain & Company survey, conducted with Dynata, found that 92% of B2B buyers prefer virtual sales interactions, up 17% from our survey in May 2020. More sellers also realize virtual selling's effectiveness, now at 79% compared with 54% last May. Suppliers appreciate how the approach can yield three benefits:

- Faster, more frequent communication with customers
- Cost-effective interactions
- The ability to interact with more prospects

Yet, despite broader acceptance of virtual selling, the execution often falls short. Frontline sales staff, in particular, report less improvement on win rates and revenue per sales representative than executives.

Companies that get it right are constantly fine-tuning the optimal balance of digital, phone and field sales. The most successful practitioners have done more than make a few tweaks to their traditional selling model, and they have not focused solely on small deals or small accounts. Instead, they have focused on mastering five areas.

Win the Sale Before It Gets to the Rep

In most business markets, there's a significant gap between sellers' beliefs and buyers' expectations. Roughly 80% of buyers have set their specifications before talking to a sales rep, and about 35% of buyers have a vendor preference before talking to a rep. Buyers tend to prefer digital sources of information in most cases, while sellers overstate the importance of in-person forums such as trade shows.

These dynamics have a clear implication: Customers doing online research on a category should be able to find a potential supplier quickly, find an offering that fits their needs, and experience the product or service through web-based demos and videos. They should then be able to quickly and easily engage, whether through a chat bot, live chat or a sales rep.

Attune Virtual Coverage to Customer Expectations

Traditionally, a sales rep and a product specialist were joined at the hip in selling big-ticket systems to enterprise clients. Increasingly, however, companies roll out in-person coverage

only when customers demand it. They are managing product specialists differently, allowing managers to assign them on a case-by-case basis to answer questions and do product demos for the most important deals. That makes the entire sales process more nimble and responsive while also trimming costs.

Build a Library of Prescriptive Sales Plays

While it is essential to get the mix of virtual and field sales right, that alone is not sufficient. Reaching full potential means spelling out in a repeatable way how the model should work depending on the specific circumstances. Here, prescriptive sales plays enter the picture.

A sales play is a coordinated set of sales and marketing actions to create and win an opportunity at a specific customer or prospect. It sets the cadence of the sale, defining how sales reps, experts and others reach out to customers and in what sequence. The play orchestrates resources across functions, supplying all marketing content, messaging and other sales collateral. Notably, sales plays are designed to expand the number of possible deals in the pipeline and convert them to actual revenue for a specific commercial objective, such as cross-selling or acquiring a new customer.

Retool the Front Line

Successfully deploying virtual sales entails an overhaul of sales support and management methods on several fronts. For instance, the best sales teams develop a systematic approach to uncovering insights about customer behavior, using machine learning analysis of customer interaction data. Zoom, the video communications firm, uses software to analyze call data in order to identify winning communication styles and inform its training of sales staff.

Coaching methods also change in a virtual world. Quarterly ride-along sessions with the boss become digital and more frequent.

Similarly, the set of skills also must change. Finding talented virtual sellers relies less on headhunters and assessment for cultural fit and more on digital fluency.

Design Each Digital Cockpit to Suit the Role

As sales and marketing software has proliferated, most B2B companies have assembled a mishmash of tools that, at best, limit the return on investment and, at worst, confuse and overwhelm the front line. It's far more effective to design each blend of software products for the role.

Marketing roles, for instance, need tools for segmentation and scoring, marketing automation, and attribution and analytics. Sales roles need account planning, prospecting, opportunity management and quote/proposal/closing.

No matter when the pandemic abates or when a new crisis might materialize, virtual selling is here to stay. Moving with conviction is the key to making these changes with minimum disruption. **SMM**

David Deming is a partner at the consulting firm Bain & Company.

# Don't Lose Deals Due to a Clunky Digital Buying Experience

Embracing digital buying processes — from the research phase to post-sales — is the only way to keep up with customers' evolving expectations, says Marie Hattar, CMO at Keysight Technologies. She offers these tips for improving the B2B digital buying experience.

1. Create a digital-first buying experience. Gartner reported in 2020 that B2B buyers spend only 17% of the total purchase journey with sales reps. That means salespeople can become "concierges" by providing personalized information that prospects can't find online. Free trials and on-demand demos allow prospects to skip the introductory sales call and explore a product on their own time. Digital-only or hybrid conferences enable marketers to reach a broader audience and create more accessible content.

2. Adopt B2C buying techniques. Create simpler, more transparent buying processes. While one-click purchases may be aspirational for enterprises, ensuring your website is easy to navigate and free of bugs is critical. Recent McKinsey research found that the three most frustrating issues with supplier websites were the length of the ordering process, the difficulty of finding products and technical glitches with the ordering process. Revamp and simplify your pricing strategy, then post it clearly on your website. Include the ability to get instant quotes or review packages based on the desired number of users or licenses or amount of storage. On the administrative side, be sure to provide order tracking, instant invoices and flexible payment options.

3. Create a seamless self-serve experience. In 2020, McKinsey found that more than three-quarters of buyers and sellers "prefer digital self-serve and remote human engagement over face-to-face interactions." This trend even applies to enterprise-sized purchases; 70% of B2B decision-makers said they were "open to making new, fully self-serve or remote purchases in excess of $50,000." Effective self-serve experiences put the buyer in control and could include features like on-demand demos, free trials and the ability to place orders with a credit card. These options can increase customer satisfaction while shortening sales cycles — and free up sales reps to focus on generating new opportunities.
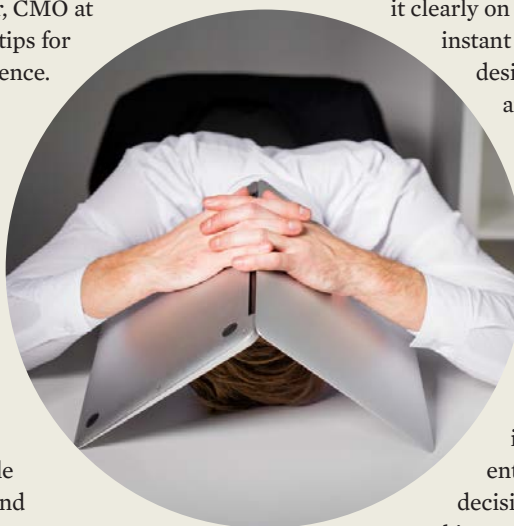
How Microcoaching Can Take Your Sales Team to the Next Level

BY C. LEE SMITH

Sales managers can take heart in a Sales Management Association study that shows effective sales coaching leads to an increase of up to 23% in rep performance. One would assume with an impact like that, sales managers would commit a significant amount of time to coaching. However, the same study reveals that 76% of sales managers spend too little time coaching. The demands of the job—being constantly pulled into meetings, putting out fires and feeling pressured to meet the short-term quota—make coaching less of a priority.

In addition, some sales managers avoid coaching because they aren't comfortable doing it. Another concern I hear from managers is that while their sales reps love the idea of professional development, they can't afford to spend a lot of time away from selling. This is where microcoaching can help.

Microcoaching is short bursts of sales coaching—personalized to the individual's specific needs— that fill the gaps between one-on-one coaching sessions. The differences between microcoaching and traditional sales coaching are when it occurs and what is covered.

Traditional sales coaching lasts 20 minutes or more, and can take place in one-on-one sessions or during a ride-along to a client meeting. It is often focused on deal coaching or reviewing the rep's pipeline at the expense of skills building and motivation. Conversely, microcoaching is the delivery of one key lesson and takes just two to five minutes.

Avoidable Consequences

In an ideal world, managers and reps find time for traditional coaching on a weekly basis. In reality, only 20% of reps get weekly coaching. SalesFuel's latest Voice of the Sales Rep research shows that 30% of sales reps would appreciate more coaching. Unfortunately, ATD research shows that 40% of managers do not have time for standalone coaching. This pervasive problem costs organizations money because reps aren't working as effectively as they could be. And sales organizations suffer when reps (38%) leave voluntarily because they don't think their company cares about them.

Your sales reps can dramatically improve their performance when they receive microcoaching in between traditional sales coaching sessions. Just like in prospecting, the superpower of an AI-driven microcoaching solution, CoachFeed by SalesFuel for example, is in discovery. The needs assessment part of this sales microcoaching platform is designed to reveal each rep's strengths and weaknesses. The assessment also goes beyond sales skills. By reporting on a rep's work style and behavioral

Are Your Reps Coachable?

Sales managers want to employ coaching to improve their reps' performance, but some reps simply don't have a coachable mindset. **Download a white paper** from SalesFuel that explores what the most coachable reps have in common and provides insights on the self-limiting attitudes that sales managers need to be on the lookout for.

Click to download!

Systemizing Sales Microcoaching

Through four years of testing and development, SalesFuel created a sales microcoaching platform, SalesFuel CoachFeed. It contains four essential elements for upskilling your sales reps.

Needs analysis – Every successful sales professional knows that their sales outcome will only be as good as the needs analysis they conduct on their prospect. Microcoaching works best when the rep's short-comings in skill set and mindset have been identified up front, ideally through a short battery of unbiased sales aptitude evaluations and psychometric assessments.

Sales coaching – Microcoaching doesn't exist in a vacuum. The material should supplement the topics managers and reps cover in their regular one-on-one sessions.

Adaptive coaching – Every sales rep is at a different point in their professional development. They come to their positions with unique strengths and weaknesses in sales skills, soft skills and mindset. Our microcoaching platform targets each rep's unique needs by tapping assessment results. We then merge the results with knowledgebase information into effective suggestions and thought-provoking questions.

Microcoaching – Shares many elements with microlearning. However, microcoaching differs from microlearning in that the rep is encouraged to answer reflective open-ended sales coaching questions. Through the benefit of AI, these questions can be asked without manager involvement. However, the outcomes improve when managers get curious and interact with their reps about their responses afterwards.

tendencies, the assessment gives the managers an in-depth look at the whole person. Managers who have been spending their time deal coaching will realize that approach doesn't work for every rep.

For example, when an assessment indicates a rep tends to jump into action before thinking about the end result, the manager can foresee the resulting difficulties in a sales situation. This decision-making style could lead to a poor outcome when the rep tries to quickly lead a prospect deeper into the sales funnel.

Armed with this personalized assessment information, managers can engage in adaptive coaching. In the case of decision-making, managers should ask the rep to think through two steps they should take before reaching out to the prospect. Over time, reps will learn how to change to their behavior to effectively close more deals.

Tactical Feeds

While sales strategy discussions are better suited for one-on-one sessions, sales tactics can effectively be addressed through microcoaching. Short, hyper-focused email and text message feeds can help your reps learn something about themselves or selling in each 2- to 5-minute session. For example, reps can get a Slack message with tips on improving weaknesses in their sales skills, soft skills or, most importantly, their sales mindset. Additional feeds address "Account-Based Coaching" — deal coaching for landing B2B prospects or saving existing accounts. The message is reinforced when the rep responds to a poll or a question or engages in a quick game after reviewing the content. Having the rep respond in this way improves upon one of the big weaknesses in traditional coaching: The manager does too much talking.

Practical Reminders

Traditional sales coaching doesn't benefit every rep. We've found that the longer a rep is on the job, the less likely they are to rely on a manager for coaching. And because some sales managers use a one-size-fits-all approach to coaching; only 25% of reps believe this effort improves their win rates. However, microcoaching may help these veteran reps. When they receive an email or a text message that contains survey data or proof about effective sales tactics, they are more likely to pay attention. While they may be quick to tune out their managers, they're likely to reflect on tips from other sales professionals.

Frequent Engagement

During a traditional sales coaching session, plenty of information and advice flows from managers to sales reps. How much of that information do reps retain? Not enough. One benefit of microcoaching is cadence. When reps receive a text or email message on a regular basis, they can draw on what they've learned in previous sessions. The repetition will encourage them to modify their go-to behaviors.

A Boost for All Reps

The bottom line is that microcoaching helps sales managers develop the middle 60% of reps. With the help of frequent microcoaching feeds, reps learn how to develop their skills and maintain awareness of the mindset needed for selling to the toughest prospects.

Managers who use microcoaching don't need to find more hours in the day. They and their reps will benefit from using microcoaching to supplement the coaching they're already providing. **SMM**

C. Lee Smith is the founder and CEO of SalesFuel, a Columbus, Ohio-based firm that leverages critical insights to enable the acquisition, development and retention of top employees and customers.

3 Trends to Watch in Data-led Marketing

BY JEFF HAWS

As we look into the future, it's important to remember that real widespread change happens slowly for such a large industry. People have been talking about assembling customer 360-degree views and utilizing "Big Data" for closing in on 20 years, and articles detailing how effective and popular artificial intelligence (AI) will be in marketing go back nearly a decade.

This is not to say change isn't happening, but that it comes gradually, in fits and starts as industry innovators latch onto a popular idea or technology and the rest of the market tries to understand what the change means for them before they decide to take the plunge and invest in the new advance.

Viewing it through that lens, the future of data-led marketing is more of a spectrum from innovators to mainstream adopters — companies more prepared to make technological and strategic changes vs. organizations that like to wait a bit to see how new tech may apply to them. There are always going to be organizations — often either startups that can move quickly or large organizations with significant resources — whose ethos

drives them to be more willing to take the early leap while others stay the course longer.

There are three key areas where you can expect the innovators of the marketing space to really push forward in the coming years, while the more mainstream adopters trail behind.

1 From a Warehouse-First Marketing Approach to Streaming

While mainstream adopters just begin to turn the corner, adapting and believing in the warehouse-first approach to data and marketing, expect innovators to start utilizing more streaming and one-to-one, data-driven methods of communicating with their customers.

Although the idea of the warehouse-first approach may seem like the newest craze, many leading organizations have been adopting these sorts of marketing efforts over the last five years. Snowflake's record-breaking IPO doesn't happen in a world where a warehouse-first approach is some overnight sensation or passing fad. Snowflake's massive opening is indicative not

only of the current popularity, but of the progress brands have been making in consolidating data for some time now.

As larger institutions in banking, finance and health care begin to adopt many of these ideas and centralize to a performant data warehouse, industry innovators are beginning to see the friction in applying that approach to all their workflows and are seeking to become more stream-first than warehouse-first.

The rise of Databricks is a good indication. Built on top of the Apache Spark streaming platform, the product can be seen almost as a transition, incorporating warehouse-first principles with the ability to stream. Innovators will begin to drive more and more of their marketing programs from dedicated stream- and event-based services and will look for marketing vendors to take advantage of these new data sources for better messaging.

2 From Cross-Channel Messaging Workflows to AMP and RCS

Innovators will begin to utilize new interactive channels like AMP for Email and Rich Communication Services (RCS) messaging, while mainstream adopters will truly adopt cross-channel messaging workflows.

AMP for Email allows senders to include AMP components inside rich engaging emails, making modern app functionality available within email. Like many innovations, AMP for Email made a splash a few years ago, but adoption has been slow because practical application of its offering needed to be developed. More email providers now offer AMP functionality, and innovative marketers will start utilizing it to deliver rich experiences.

Similarly, RCS protocol is Google's take on mobile messaging that offers up popular features from other messaging apps like Facebook Messenger, iMessage, and WhatsApp into one platform. For both AMP and RCS early adopters, now is the right time to lead and deliver interesting new avenues to stand out to customers, as both of these channels are early enough where there's opportunity to make an impact. But ability to capitalize on them is easier than it was when they were first introduced.

Mainstream adopters are finally at the point where they're essentially forced to get cross-channel messaging right. The omnichannel concept is no longer theoretical—consumers now simply expect a seamless experience regardless of where the interaction takes place—so brands, particularly in the retail, hospitality and financial sectors, will work to get it right.

3 From Dabbling in AI to Making AI a Core Part of Your Brand

Innovators will make AI a core part of their brand, while mainstream adopters begin to experiment with AI and adopt conversational messaging. AI has been around forever and is talked about every year, but is just now to the point of being approachable for the average marketing department. Tools are available that make it easy to leverage AI, and consumers enjoy experiences where earlier adopters have utilized it well.

So what does it mean to make AI a core part of a brand? For many, it's subtle usage in website or headline copy, recommendations or other situations where the functionality makes the customer experience better. Retailers will use it to help customers make important buying decisions, travel brands will use it to help customers plan the perfect vacation, and financial brands will help customers make sound decisions with their money. AI will help marketers connect consumers with the brand in new and meaningful ways.   smm

Jeff Haws is senior marketing manager at MessageGears, which delivers advanced customer segmentation and message personalization and delivery through direct data access and innovative platform capabilities.

5 Common Virtual Meeting and Event Mistakes

BY SAMANTHA DECKER

A lot of us are enjoying limited face-to-face interaction again, and we'd like more. Whether it's meeting colleagues around the water cooler or meeting new sales accounts at an event, we look forward to additional in-person collaboration and connection.

For others, virtual events are a gateway to something better. Working parents don't have to choose between lengthy business travel and staying home with their families. Companies with teams spread across the country now have an exciting (and cost-saving) means of connecting their colleagues.

We're excited to return to normal, but the reality is our "normal" has changed. Virtual events are here to stay, and that creates the need to reevaluate our meetings and events strategy. Conventional wisdom is that business interactions will include a mix of virtual and in-person events, and even in-person events will likely have a virtual element.

As you start planning your virtual meeting or event, watch out for these common mistakes.

Inviting everyone on your list

Being able to quickly scale up your virtual meeting or event to accommodate more people is a big advantage over in-person events. But just because you can invite more people to your virtual meeting or event doesn't mean you should. Even with virtual meetings or events, bigger isn't always better. More virtual attendees could negatively impact the overall experience and it could increase your overall event costs. Don't lose sight of the basics of event planning. Make sure you've defined your target audience well so you can meet your goals and objectives.

Being boring

As important as it is to captivate in-person audiences, it might be even more imperative for virtual attendees, especially when a second computer screen is within reach and the refrigerator is steps away.

Exceptional content is still the best way to engage and inspire your audiences. But your in-person content does not always transition easily to a virtual setting. Our attention spans are much shorter when we're watching something virtually. Limit keynote presentations to 20 minutes, allow for plenty of stretch breaks, and create opportunities for fun with giveaways, quizzes or trivia games.

Not being memorable

What do you remember about the last in-person meeting or event you attended? Was it the connections you made? Perhaps it was the free food or swag? Or, was it the high-quality entertainment? You can replicate these experiential elements in your virtual event, too.

Consider sending your attendees an event-in-a-box with items carefully curated to connect them to the content being presented. Rally your early morning event attendees with a coffee break courtesy of a Starbucks e-card you sent in advance. Conduct group yoga or breathing breaks throughout the event to stimulate the brain. Or, simply include intimate roundtable discussions throughout the presentation to increase collaboration and connectedness.

Too scared of tech

Just because the format is different doesn't mean it's scary. Don't worry about the "what ifs." Instead, plan ahead and let the technology work to your advantage. Virtual event platforms allow you to offer live and prerecorded sessions, breakout rooms and chatrooms, and even polling functionality and in-session Q&As. Imagine the possibilities!

Virtual events allow marketers to gather more measurement data than ever before. You can track participation levels prior to, during and after the virtual meeting and event. Because of the technology, it's easier to determine what sessions registrants attended and how long they stayed, what types of sessions had the most engagement (networking, chat rooms, breakouts, etc.), and even who downloaded collateral or watched sessions on demand.

Poor deadline management

Virtual meetings and events have less flexible timelines than their in-person counterparts. A good rule-of-thumb is to assume your live date is one week before your actual program. This gives you ample time to upload all materials and set your rehearsal and recording schedules. You'll also want extra time to test the platform and conduct a pre-production call with your presenters to review the technology and ensure the remote connection is strong.

A virtual meeting and event might be new to you, but the same event planning skills you already have still apply. Don't be intimidated by virtual events. Instead, flawlessly plan and execute them, and be amazed at just how engaged your audiences really are. **smm**

Samantha Decker is director of marketing and demand generation at One10, which provides a comprehensive suite of services to align clients' business goals with what's important to employees, dealers, channel partners and customers.

We Need To Put the 'Customer' Back in CRM

BY DAVID ROBERTS

Customer relationship management (CRM) software is critical to how companies market to, sell to and service their customers, but it's inherently an internal tool focused primarily on process adherence and control. Although "customer" is in the name, it's often not in CRM software's DNA.

The challenge for the next evolution of CRM is to put customers at the center of the application by extending it and engaging customers or prospects in the core business processes that fuel the business.

Making CRM Work for You

From the beginning of the CRM space, executives craved more insight and data from their marketing and sales teams, which historically worked from intuition rather than institution. These same executives also sought to create more process and controls in the marketing and sales organizations to try and improve the predictability of sales results.

In my early days implementing Siebel, we struggled to get sales teams to sync their laptops, never mind follow the sales process or manage their pipeline. Some things have changed with cloud-based solutions like Salesforce, but the focus of these applications still have not become customer-centric. We continue to find ourselves asking about lead conversion, sales stage entrance and exit criteria, and forecasting accuracy.

Companies' boards of directors and executives pay a lot of attention to sales, and for good reason. Executives watch lead volumes, pipeline shape and size, and bookings progress religiously. CEOs and CFOs view weekly forecast meetings as critical and often strain to see through sales optimism to predict where sales are headed. They rely on the sales teams to provide insight—to relay how prospects and customers view us and what their buying process is. If you ask sales reps, they will say they spend too much time keeping CRM data accurate and too much time forecasting their business.

There Is a Better Way

What if the customer could tell you themselves how they approach their buying decision? Technology today enables this. We can extend the core CRM processes to engage the customer more completely. The customer could effectively tell organizations where they are in their own process. They can share their business goals, buyer values and decision-making process. They can tell companies their unvarnished view of what's working and not working in their purchasing process and with the product that they are offered. Marketing and sales organizations can spend more time being creative with discovery and positioning and less time asking non-value-add process questions.

The future of CRM is bright, specifically if customers can engage in their buying process themselves. Companies and software providers will focus more completely on the customer. Differentiation of CRM providers in the future will center on extending these core solutions to engage the customer directly. Customers know what they want, and they know how they want to engage. Organizations have a huge opportunity to engage the customer in their own experience. **smm**

David Roberts is CEO of Alchemer (formerly Survey Gizmo). As a founding member of Accenture's CRM practice in the early 1990s, he has been on the frontline of the CRM evolution and revolution.
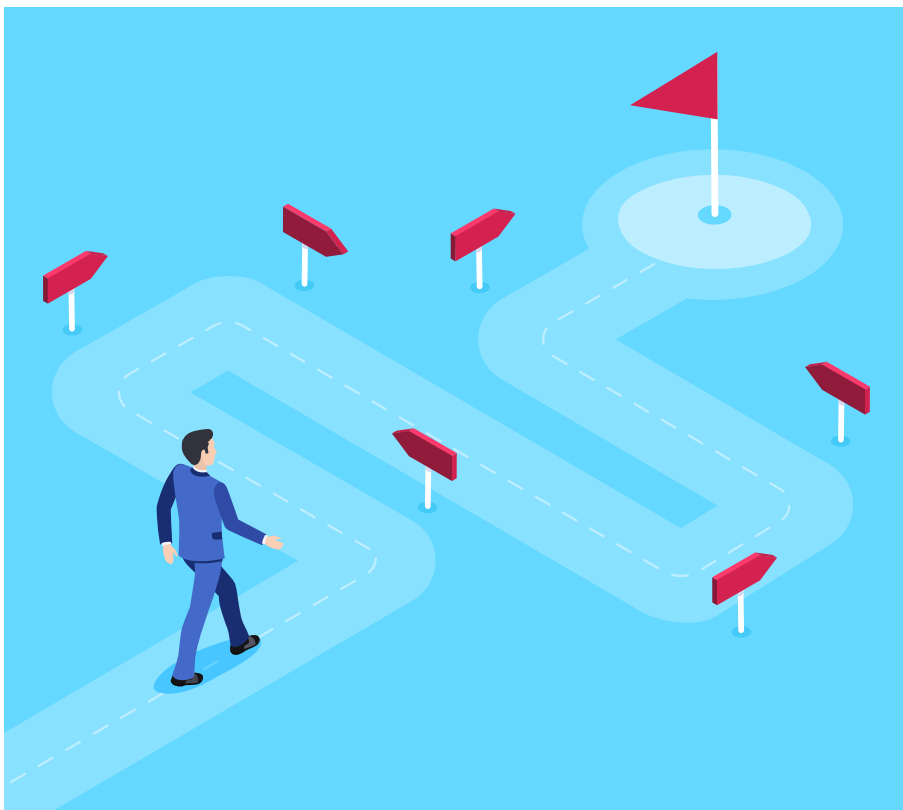
3 Ways CRM Automation Makes Salespeople's Lives Easier

BY MICHELLE PIETSCH

Today's sales reps have all the tech they could possibly need at their fingertips: CRM, lead generation tools, email management software...you name it. There's an abundance of technology geared toward helping reps do their jobs better, but not a lot that makes their lives easier.

Enter the CRM automation platform: software that helps all those apps communicate with one another while keeping all of the reps' data in one place. This type of software as a service (SaaS) is tailored specifically to the needs of the people who actually use the product: sales reps.

Here are three ways CRM automation can make salespeople's lives easier — and help them close more deals in the process:

Saving Time

The average salesperson spends only about 34% of their day actually selling. The rest of that time is usually spent taking meeting notes and entering data into CRM. All this time spent on soul-crushing admin can lead to lost income, frustration and poor communication among sales teams and managers.

CRM automation makes this nightmare go away, saving sales reps hours upon hours of grunt work every week. No more double data entry. No more frantically typing late at night because you forgot to update your CRM. Reps enter their data once in the platform, and it's automatically synced back. Poof, done!

Staying Organized

Remember all those apps mentioned earlier? Wouldn't it be great if they were all linked in the same place, so sales reps wouldn't have to keep overheating their computers while running seven or eight of them at a time? Believe it or not, all the tools reps have been given can create more chaos than alignment. With tool integrations, CRM automation platforms can sync with Slack, Zoom, calendars and more, so reps can work in one place with everything they need to sell at their fingertips.

For example, Dooly, the leading CRM automation software that makes updating Salesforce fast and painless, offers a wide array of tool integrations. Sales reps can sync Dooly with Google Drive and Calendar, Outlook, and other applications – and can even activate a Dooly Chrome extension so they can access the platform no matter what they're working on. There's no need to keep dozens of tabs open 24/7 when everything can exist in just one. CRM automation can help you declutter your browser — and your brain.

Staying Connected

When the world went remote, reps who used to work in the same office were suddenly scattered across the country. That meant teams had to navigate different time zones and workflows, all while dealing with a global pandemic. This is why note-sharing capabilities are a must.

Making sure salespeople can access the same information and work with one another across time zones can streamline the sales process and keep sales reps, managers and teams connected regardless of their locations. This tech will also be an easy win for salespeople working under a hybrid model as offices start to re-open, with reps alternating working onsite and from home.

Furthermore, as we enter a vaccinated world and travel restrictions begin to lift, the traveling salespeople of the world are getting ready to trade in their Zoom fatigue for airline tickets once more. Salespeople on the go need to be able to access their notes from anywhere in the world. A connected workspace platform can keep both reps and their teams tuned in from across the globe.

Platforms like these are a one-stop shop for sales reps, keeping all of their data, tools and notes in one place. By taking these common woes off the table, CRM automation enables reps to spend more time doing what they do best: selling. **smm**

Michelle Pietsch is the vice president of revenue at Dooly, a sales enablement platform that collects information and insights essential to close business sales. She has a robust history of developing and scaling sales teams for fast-growing startups.
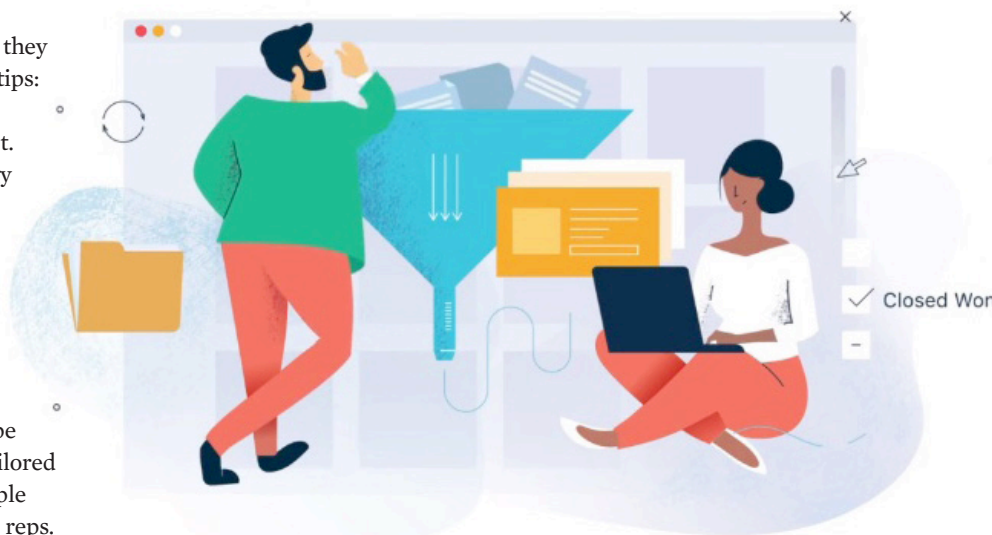
How Technology Drives True Sales Enablement

BY GEORGE DONOVAN

Getting sales enablement right is a significant challenge for many organizations. In some cases, it consists of hurriedly cobbled together materials meant for temporary use, while others have scrambled to transfer their structured and overly formal programs, where reps are trained once and material is quickly forgotten, to the digital world. Neither of these approaches works well as part of a long-term strategy to prepare reps for continued success.

Sales enablement's importance cannot be understated. New hires rely on detailed training and veterans need to stay updated with the best tools and practices for the changing market. Modern sales enablement also can't be siloed, but instead must focus on aligning the sales teams with other parts of the organization, such as marketing, product and HR to support sellers and drive productivity.

With so many moving parts working at once and virtual sales here for the long run, it's critical that organizations stay up to date on the latest sales enablement technology in order to prepare for and thrive in the virtual sales space.

Technology in the Virtual Onboarding Process

The first step in adapting to the new normal of sales is to properly train and coach new hires.

Effective sales training involves continuous learning and constant reinforcement of product knowledge, messaging, positioning and the skills needed for valuable interactions throughout the virtual sales process. Due to remote work, sales leaders say it now takes twice as long for new hires to be productive compared to when they could train in person.

Asynchronous learning alleviates the stress of finding times that work for everyone and also helps employees retain information better. Giving everyone access to a central repository of information in the form of videos, presentations, lessons and exercises encourages multiple interactions and provides users with the tools to get answers to their questions. When coaches and new hires have the right technology, they can begin to collaborate and make the most of their training.

Coaching and instructor-led courses along with self-directed modules and peer-to-peer learning fosters engagement with a company's culture and exposes sellers early to best practices, maintaining the human connections during virtual work and speeding up the onboarding process.

Rep-Centric Technology and Collaboration

Sales teams work better when technology works for them. Sales enablement technology should take a rep-centric approach. This means delivering the training and content sales reps require at the moment of need, tailored to individual learning patterns, and driven by in-field demands, not top-down mandates.

Modern sales enablement technology also gives sellers the power to teach and learn from other sellers. Best practices and successful sales calls for example, can be captured, shared and analyzed by the whole team, encouraging a collaborative process that emphasizes working together. Since sellers are the ones directly involved in the ever-changing market, shared content will be both relevant and timely for other sellers. Combining video examples of what good looks like from top sellers and insights from the field also equips an organization with future training tools, updating the training process in real time.

AI and Data

According to Allego research, 76% of sales leaders say that not being physically present with their team has made it harder to observe and coach. It's significantly harder to monitor sales calls and provide constructive feedback, for example. AI is making big waves in sales enablement. On top of automating rote tasks, AI in sales can independently monitor sales calls, recommend content based on recorded calls and analyze specific trends surfacing across sellers' behavior and performances.

Sellers are making over a dozen calls a day. With sales managers overseeing large teams of reps, it's impractical and inefficient to monitor, assess and provide detailed feedback on every call. This can lead to missed opportunities, misunderstanding of the current market and a dissonance between what sellers need to learn and what organizations teach. AI, through listening and transcribing every call, can do much of this work for managers. Identifying specific wording, key points and brand consistency will lead to a better feedback loop as well as more relevant issues to focus on for training.

AI also delivers detailed analytics to improve the selling process, giving managers and organizations suggested actions and finding current best practices for sellers.

Sales enablement technology is always evolving. Though virtual selling is going to be here for the long run, how organizations effectively prepare reps to succeed will change. New technologies will assist organizations in making the long-term transition while improving onboarding, coaching, collaboration and sales performance. **smm**

George Donovan is Chief Revenue Officer of Allego, a sales learning and enablement platform built for today's distributed teams.