



WHY DATA + BEHAVIOUR = BEST IN CLASS PERFORMANCE



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EXECUTIVE SUMMARY

Industry statistics show that the highest sales performers use data analytics. CloudApps interviewed 37 sales leaders to download their experience of using data insights to drive sales team performance. Challenges include data gathering, data use and adoption of CRM systems and sales methodologies by sceptical sales teams. Those teams that have adopted CRM, use data insight as a productivity tool to boost their performance. A focus on sales behaviours, not just revenue targets helps contribute towards a motivated sales team and builds a great sales culture.



INTRODUCTION

The use of data analytics and sales technology is still in its relative infancy, especially when compared to the rise in use of marketing automation systems in recent years. Indeed, it's the prevalence of marketing CRM systems that is one of the big factors driving the adoption of sales technology – a logical next step in automation if you like.

Sales technology adoption looks set to follow the growth curve of CRM systems. Aberdeen Group says that a remarkable 16% of UK company's future technology spend will be in the area of sales.

The advantages of adoption are clear. With an estimated 34% of sales people's time lost to 'non-sales' activities (Aberdeen) and traditional work patterns of prospecting, appointment making and closing the deal meaning they 'do a bit of everything' there's a tremendous opportunity to increase efficiency and free up sales time via automation.

Those companies that have already adopted sales technology – the best in class (as Aberdeen categorises them) – are seeing 2.2 times the effectiveness at minimizing human error/inefficiency with analytics, technology or machine learning, compared to all others.

A McKinsey study into 1000 sales organisations also found that use of technology – specifically data analytics – was a characteristic of 53% of the highest performers.

However, the same study indicates that 57% of sales organisations struggle to deploy analytics relying instead on sales talent as the major determinate of sales performance.

Organisations also struggle when it comes to accurate sales forecasting, relying on data about the quantity of deals, not the quality of deals. CRM systems are of limited use at this point in the pipeline where sales people engage, instead different KPIs are required.

We recently interviewed 37 sales leaders to understand more about their current use of data analytics, sales technology and KPIs, distilling their wisdom into this eBook.

CHAPTER 1

A data led sales methodology

1. Meaningful data is the starting point

“Data is incredibly important.”

From our interviews, it became clear that the number one challenge for sales teams to address on their road to digital transformation is to ensure they have the right data available to them and in the right place.

Many organisations now use CRM systems, but this data will only take the sales and marketing process so far. Sales forecasting still tends to rely on ‘soft’ information rather than hard data, often meaning it’s the best guess of a sales team at a given moment, under the heavy pressure of a given sales target.

The top performing sales organisations are taking data analysis further - adding key performance indicators, for example, productivity targets and monitoring sales behaviours to improve performance and forecasting further down the pipe.

Talking to sales leaders data of this type is key to their sales methodologies.

Lee Hart, Sales Director at First Data UK puts it this way:

“Near term data is critical - There can be no better indicator of what may happen. Forecasting can only be done effectively if you properly understand what is happening and what has happened, spotting anomalies that drive you to ask questions”

Hart sees data as key to forecasting both short and long term:

“I look at data every single day. We use it for establishing patterns such as impacting market factors, macro and industry factors. These forecasts can be used daily, for the medium term right the way up to yearly forecasts.”

Peter Sutton is Global Head of Market to Order Excellence at Philips. He has seen data grow in importance and sees it as crucial, not just in forecasting, but to underpin their sales methodology and processes.

“Data is incredibly important - I’ve got quite fanatical about it in recent years. We’ve been through a lot of transformation, the biggest element is harmonisation of data resulting in much stronger opportunity management.”

Senior Sales Leader Patrick Siedel echoed these sentiments:

“It’s crucial to have the right data in place and the right balance sheets to steer the sales force in the right direction.”

A data led sales methodology

▶ 2. Moving data onto an automated platform

Whilst data is seen as crucial to forecasting and the sales team, organising the important data into the sales process in a way that can exploit the data value is a considerable challenge in itself for many sales leaders.

Getting all the data onto an automated platform to start with has been one of the principal challenges for many of the sales leaders we interviewed.

“So we’re not running the business on napkins.”

One Vice President of Sales interviewed recently made the move from manual to automated:

“We currently track everything via spreadsheet, as our current software is not up to task. We’re moving to Salesforce across all business units so we’re not running the business on napkins. Our expectation is we’ll finally divorce ourselves from spreadsheets. Manual manipulation of spreadsheets is time consuming and inefficient.”

Peter Sutton acknowledges too that Philips faced a challenge in automating data:

“Previously data was held in pockets, in different formats, in different forms and in most cases unstructured.”

3. Understanding your customers through historic and current data

As part of the overall data set, many sales leaders highlighted the importance of holding a body of information on customers – both past and present, as a priority.

Chioma Wigwe, Sales Manager at Thomson Reuters sees automating customer data – both historic and current as a key challenge that organisations must meet in order to be more effective:

“Go in more informed and you can have a more constructive discussion with the prospect leading to a successful sales cycle.”

This is a point that a Global Head of Sales also made in our interviews – he sees this type of data as a top priority:

“If I don’t have historical and actual data I am actually blind.”



A data led sales methodology

▶ 4. Understanding the pipeline and improving forecasting

“...moving from 30% to 60% accuracy.”

Sales forecasting has always been an inexact science, often only as accurate as the sales teams' knowledge of their customers and their gut feel. Automation promises to improve this significantly and it's a challenge a Global Head of Sales is working on with significant results:

“Marrying the accuracy of forecasting with the reality of sales teams' optimism is a gambling process. But we're getting more accurate and moving away from manual forecasting to an automated pipeline.”

Catie Ivey, Director of Sales, at Marketo states that

“The piece that is really important is being able to use historical trends and metrics then apply all that data accurately for forecasting.”

Patrick Siedel is also on a mission to move from a manual to an automated process:

“It's about the balance of manual to automated data – we would like as much to be automated as possible. We're near to 100%, and would like to move that to 100% even when there are always KPIs and ways of working that cannot be measured or managed in an automated way.”

Sales leaders are seeing considerable value in transforming their sales forecasting to an automated approach, making it worth the time and cost of doing so. Of course software is only one half of the sales equation. The other half - the sales team are not so easily automated!



A data led sales methodology

▶ 5. Understanding your sales teams behaviours (and the challenges in tracking them)

“Salespeople are the strangest animals in the world.”

Whilst our interviewees were unanimous in their belief in data automation to revolutionise their sales activities, they also acknowledged that the talent of sales people is still a massive factor in the success of any sales operation. As Christopher Bensch, Director Strategy & New Business Development says:

“You cannot create a forecast based on a click or algorithm, in the end people still buy from people no matter what data you have.”

One Global Head of Sales also underlines that in contrast to the logic of sales automation systems, sales people are a distinctly unpredictable factor:

“Salespeople are the strangest animals in the world, difficult to frame them or cage them.”

One thing the best sales organisations are able to achieve though is to manage the data relating to their teams' sales behaviours. Typical sales behaviour monitored might include:

- 10 new meetings booked in a week.
- All leads qualified within 12 hours
- Meaningful future-dated next steps entered for each deal.

Using a data driven approach to these simple behaviours can pay huge dividends, as outlined in the next chapter.

CHAPTER 2

Translating data into sales success

1. A clean and healthy pipeline

Understandably, sales people can be suspicious of new systems at their outset – viewing them perhaps as a tax on sales time rather than a productivity tool, but once in use, the benefits begin to shine through, as Christopher Bensch has experienced:

“The initial feeling was that it’s a reporting system imposed by HQ to create reports so they could steer sales from that. Now they see great value in it. They can use it in a meaningful way, giving transparency to the team, enabling increased performance, improved judgement and helping the team to collaborate.”

“...even the best can get better.”

The collaboration advantage is also something Bensch is keen to highlight:

“These tools are essential to create transparency within the sales team – they make them feel part of a bigger group, they get hints and tips from colleagues on how to improve - even the best can get better.”

Lee Hart also highlights the advantages of automation in terms of collaboration and clarity of purpose within the team:

“Everyone’s involved in looking at the data at daily and weekly meetings right down to the most junior manager. Everyone’s talking the same language and when we make decisions we get buy in quite quickly.”

The clarity a data led approach via CRM provides is something Christopher Bensch also highlights:

“It’s about the pipeline, look at the funnel, look through the windshield at the road that is ahead of you.”

There’s no doubt that moving sales data into a CRM like Salesforce is a tremendous step forward for sales teams that might previously have been operating with siloed information, contained in numerous spreadsheets, contact databases or even on napkins!

However, the next stage in improving sales productivity and forecasting is not necessarily to do with the picture that a CRM paints – largely because they focus on the quantity, not quality of customer interactions.

“A healthy sales pipeline should actually look more like a cocktail glass.”



Translating data into sales success

▶ One of our interviewees explains why sales forecasts can be inaccurate and why the shape of the sales pipeline is key:

“Most sales leaders have also been conditioned to talk and think about their pipeline as a “funnel”. They will view the funnel to have a wide mouth that narrows in a regular fashion to be thinner at the bottom.

In terms of measuring pipeline health, the use of this shape is somewhat misleading. A healthy sales pipeline should actually look more like a cocktail glass. One that is wide at the top, but that very quickly narrows into a long stem that only slightly recedes in width as it makes its way to the bottom.

The most significant drop-off in a healthy pipeline should be at the top where every lead or early stage deal is qualified hard. Once a deal passes through the initial qualification barriers then the pipeline shouldn't narrow much further.”

2. Increasing sales cadence

“Not everyone on a sales team is a Thierry Henry.”

Thinking about the pipeline as a cocktail glass shifts attention to the quality of deal and also to the sales behaviours that are optimising (or otherwise) sales revenue.

One key measure of sales performance that makes a significant difference to revenue is what one interviewee refers to as ‘sales cadence.’

“Sales cadence is about measuring and targeting the activity levels of sales people rather than solely targeting them on revenue. So to use a football analogy, rather than saying to your underperforming striker that they have to score 30 goals this season, you target them instead to run 10,000 meters in a game, make 30 runs behind defenders, get on the end of 20 crosses and have 10 shots on target. By reaching these ‘cadence’ targets, you know your striker now has a good chance of doubling the number of goals they'll score over a season.”

Separating out the measurement of sales behaviours from revenue targets is something Lee Hart is a fan of:

“Productivity metrics are kept separate from sales metrics. We employ metrics at every stage. At a base level our bread and butter metrics are calls, opportunities and sales.”



Translating data into sales success

▶ 3. Coaching middle performers

Of course not everyone on a sales team is a Thierry Henry, but uncovering the habits of top performers and applying them to the core team is a recipe for serious revenue improvement. A study by the Sales Executive Council showed that a 5% performance increase in the core team yields over 70% more revenue, when compared to a 5% shift in top performers' productivity.

“Moving the middle.”

One interviewee describes this process as ‘moving the middle’.

“We want to track the high-value sales behaviours that really make a difference to deals. Such behaviours often have a timing and cadence to them.

Sales managers usually obsess about sales activity. The logic applied is that more activity equals better results. However, if we think about activity versus high-value sales behaviour it is clear that this obsession is misplaced.”

Catie Ivey says that

“When it comes to winning habits and best practises, some of it is difficult to put your finger on...we do all sorts of different things from workshop, exercises and role-plays to try to help reps learn how to think differently, think on their feet and more proactively problem solve.”

Examples of good and careless sales behaviours can be summarised as follows:

Good sales behaviours:

- Meaningful, future-dated next steps entered for every deal
- 10 new meetings booked in a week
- Rapid lead follow-up; qualified within 12 hours

Careless sales behaviours:

- Opportunities where the close date has been in the past on multiple occasions
- Deals where the next step has lapsed numerous times
- Deals where the sales stage has bounced backwards or forwards

4. Creating a great sales culture

“There are too many lone wolves in sales today.” ▶

Translating data into sales success

As mentioned earlier, having the sales team all using a single automated sales process can help foster a positive sales culture, where good sales behaviours (meetings booked, quick follow-ups) are encouraged and bad behaviour (lapsed steps, close date passed multiple times) are discouraged. Organising this in a collaborative environment - effectively singing from the same hymn sheet is something Christopher Bench sees as defining sales success:

“A successful salesman takes ownership and collaborates with team. In order to be successful it’s about providing them with tools and the Salesforce CRM does that.”

He sees it as a positive move away from what he sees as an individualised culture:

“There are too many lone wolves in sales today. With increasing complexity and customers asking for more things that cannot be done by a single sales person, it needs a team.”

There’s still an important place for the manager to oversee what is happening though he adds:

“Machines can form good solid decisions but as a manager you need to be in the driving seat and use of gut and knowledge of market and your people.”

These tools in the right hands can lead to significant innovation too:

“Some of the best sales people go beyond the call of duty, using the data provided to them and using that data go out in a variety of innovative ways to develop leads.” Chioma Wigwe

Empowering salespeople with the freedom to innovate is something Patrick Siedel also comments on:

“Simplifying processes, gives sales reps the opportunity to be successful. If you give people access to the right tools, you give them more responsibility and they can make the right decisions.”

“Energise using positive motivation.”

According to one interviewee, building a great sales culture is not just about incentivising via compensation plans but motivating teams to follow the right behaviours. He’s a fan of sales contests linked to positive behaviours:

“A good sales leader knows you need many steps to close more and bigger deals and it’s here where sales contests really come into their own. Running targeted competitions will steer your team in the direction you want them to take. Sales competitions can deliver spectacular results. But, for this approach to really take off, you need to make sure you’re running healthy competitions that entice your entire team.”



CONCLUSION

It's clear from the interviews with sales leaders that they see the future of sales involving widespread use of data analytics and automation to boost sales performance. The best performing sales organisations are already proving the value automation can bring.

The salesperson is not going to be replaced by a robot anytime soon though, sales talent is still highly rated by organisations and automation is seen as a way of enabling high performers to do even better, whilst sharing insights that the whole sales team can use to up their game.

Whilst increased revenue is the aim of the game, the future sales manager will focus on behavioural targets as well as revenue targets, using sales competitions to motivate the entire sales force. Data insight underpins this new way of working leading to better forecasting, better results and a sales team collaborating with one vision.

The last word on the future of sales goes to Patrick Siedel:

“If you look back on the benefits of the past 10 years, when sales reps have managed customer relationships with leaflets and their sales folders and now how they they serve their customer universe through CRMs we can just imagine what powerful tools we will have in 10 years.”



FINAL THOUGHTS FROM CLOUDAPPS

We'd like to give a massive 'thank you' to all the business leaders who took time to partake in this survey. We have found their insight incredibly useful and we plan to incorporate these findings into our roadmap, so that we keep meeting the needs and expectations of our customers.

We believe that sales success is deeply rooted in the behaviours of the sales team and therefore, it is paramount that we find better ways to uncover that valuable data so that we can engage, motivate and coach our sales team to achieve ambitious targets.

There's a science to winning but still, we often leave Sales to chance. As we've seen in this paper, sales leaders are hungry to better understand what it takes for their sales force to win. It is our mission to help them break down those leading KPIs into the high-value behaviours that lead to success - so that the path to revenue is clear and repeatable.

We're in an exciting time where data and technology are finally aligning to boost productivity and help us work in more efficient ways. We're thrilled to be able to bring more clarity to forecasting, better solidity to pipeline health and advanced tools to guide and coach sellers.

If what you've read in these pages has piqued your interest, please don't hesitate to get in touch with us for a deeper dive into boosting the performance of your sales team.

David Kirk
Chief Revenue Officer at CloudApps



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CHRISTOPHER BENSCH

Director Strategy & New Business Development, **Phillips**

Since more than 15 years, Christopher Bensch's passion is the interface between smart technology and its usage in healthcare. In his current role as director Strategy & New Business Development and member of the management team of Philips in Switzerland, he is looking to build bridges between consumer and professional oriented solutions in healthcare. To achieve that he holds a degree in Medical Engineering along with an executive MBA from the university of St. Gallen. His professional career includes a rich experience in international Brand Management for orthopedic navigation systems at Zimmer and several Sales- and Management positions in the healthcare industry for Philips in Switzerland, Austria and Germany.



LEE HART

SME Sales Director, **First Data Corporation**

Lee Hart has been building, leading and optimising, high performance sales teams for over a decade. Using data to understand what can be improved and a focus on people to execute on that improvement, he has managed to deliver continuous improvement across a number of industries including, Property, Advertising and Finance. Having recently completed his MBA, Lee has developed an increasing passion for understanding the factors which drive Employee Engagement and the role which Emotional Intelligence plays in Leadership.



CATIE IVEY

Director of Sales, **Marketo**

Sales executive with an expertise in social media marketing, lead generation, and marketing automation, as well as experience in sales management, recruiting, team building, revenue forecasting, contract negotiation, networking and entrepreneurship. Passionate about social media's ability to build a more connected world and help companies drive revenue and brand awareness.

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PATRICK SIEDEL

Senior Sales Operations Manager, **G&A**

Patrick Siedel is a senior sales professional with a wealth of experience in sales operations and sales management.



PETER SUTTON

Global Head of Market to Order Excellence, **Phillips**

Peter Sutton is Global Head of Market to Order Excellence at Philips. He has over 30 years of experience within the Healthcare industry as both a customer and supplier. He has held key Sales and Marketing roles in Philips over the last 20 years working extensively in the UK and globally. He is now responsible for building, deploying and improving commercial capabilities that allow Philips to better serve customers.



CHIOMA WIGWE

Sales Director - Inside Sales, **Thomson Reuters**

I have been in sales for just under 20 years. 14 of those years have been spent at PLC/ Thomson Reuters where I worked my way up from Account Manager to Sales Manager. I have run successful account management and more recently new business teams and driven performance to exceed targets regularly. I have very recently been promoted to Sales Director for the Inside Sales team responsible for managing existing accounts as well as driving new sales.

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List of those who took part

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