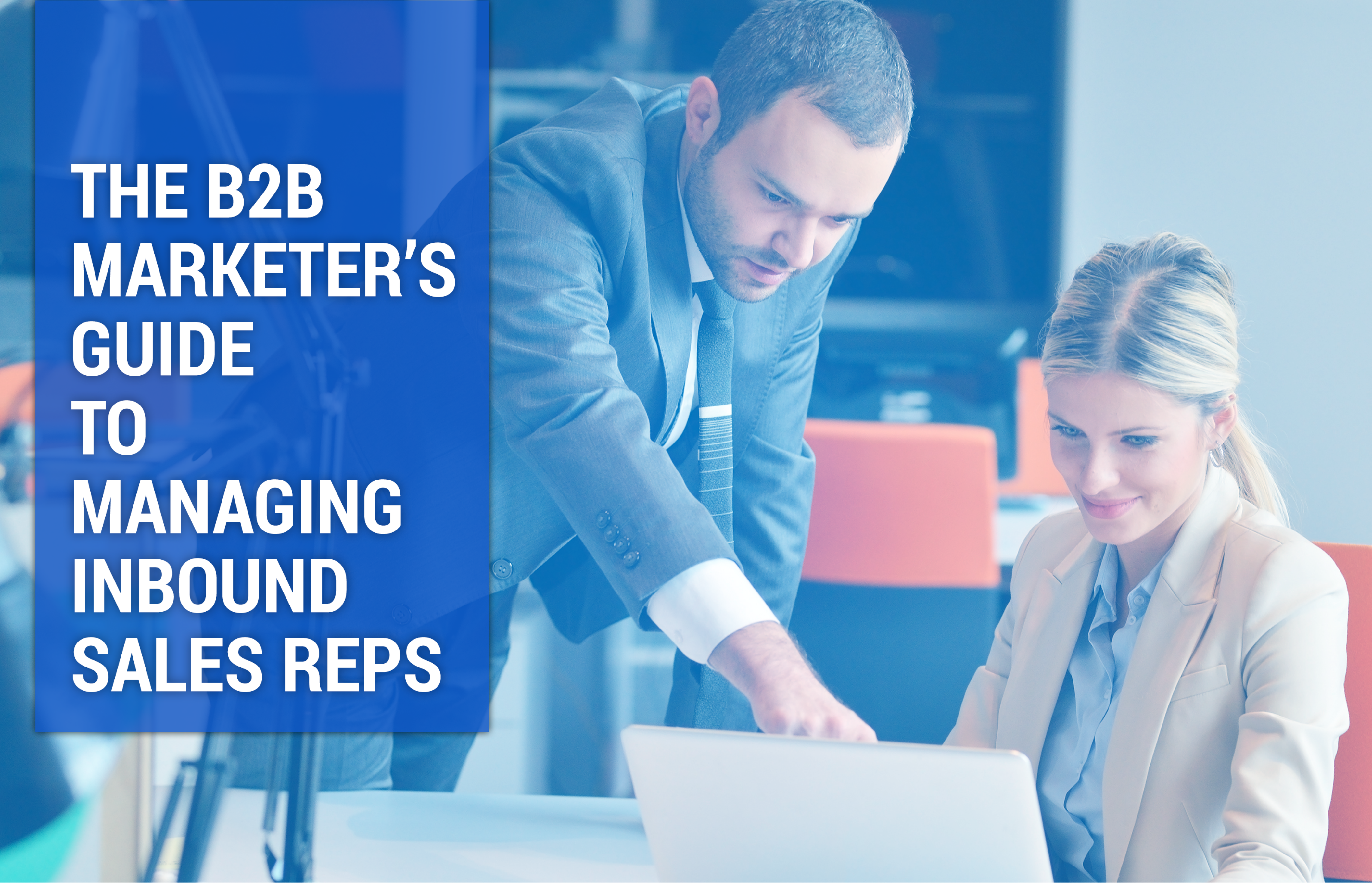
THE B2B MARKETER'S GUIDE TO MANAGING INBOUND SALES REPS



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FORWARD BY MATT HEINZ

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Much has been written about what makes for good inside sales professionals – front line reps, managers and executive leaders. But what about the growing percentage of B2B marketers that either enable sales or directly manage sales reps? Written with that goal in mind, this book is filled with vital best practices and other recommendations to make your inside sales team perform more efficiently and effectively than ever before.

But as every rep, manager and executive knows, it's often the intangibles that separate good sales managers from the great ones.

Below are seven key attributes I most often find in the best, most successful sales managers. In this case, I'm defining success not only by how well they hit their number, but how well they inspire, empower and prepare their teams for sustained success as well.

1. Creativity

Even with a well-defined sales process, a consistent brand position and standardized tools, successful sales managers are constantly innovating and improvising to get more out of the market and their teams. This goes for everything from objection-handling to internal contests and more. The very best sales managers are both creative and disciplined, meaning they're able to not only come up with great new ideas to test, but also effectively triage and measure their effectiveness.

2. Consistency

You can't play favorites. You can't adjust expectations too often. When your sales reps are facing adversity and a highly-dynamic selling environment (often where "no" is the most commonly-heard answer), consistency on the part of the sales manager is extremely important. Consistency drives trust and credibility for sales managers, which allows them to get away with occasional bursts of creativity without implying that the entire ship is turning a different direction.

3. Curiosity

Great sales managers drive their bosses and often their marketing counterparts nuts. They're always asking questions – why is it like that, how did that work, why didn't we try it this way, should we participate in this new user group, etc. Similar to creativity, however, curiosity is best executed when there's a level of discipline and accountability behind it. Asking questions is one thing – having a productive opinion and volunteering to help identify or execute the answer or solution is quite another.

4. Conflict Management

No matter the size, age, nature or overall make-up of the sales organization, there will be conflict. I've heard some inside sales managers describe their culture as somewhat akin to middle school. Ineffective sales managers, in this environment, take up the role of that vice principal you remember who was always in charge of discipline. More effective sales managers enforce behavior and discipline standards but do it in a more productive way – leveraging their standards of both consistency and fairness to get the team back focused.

5. Confidence

Don’t mistake this for optimism. Great sales managers don’t need to be glass-half-full people all the time. But they need to exhibit confidence in their teams, their products, their companies and the daily/weekly/regular processes that deliver results. Sales reps look to their managers daily for guidance and direction – not only in where to focus but in how to act. Confidence from the top down drives behavior, effort and results.

6. Can-Do, Will-Do Attitude

I’ve worked with sales managers who have great ideas but rarely get their hands dirty. The best sales managers lead by example, regularly roll up their sleeves and work right along side you. They join you on sales calls, build the next-month sales promotion, dig through lead list options with the marketing team, and otherwise focus plenty of time and energy not just on managing but also doing.

7. Calm

Not necessarily calm as in quiet or shy. Calm as in patient. Even-keeled. Passionate at times, but generally a combination of consistent and confident, steady when the workday or the last sales call or the economy is roiling. This provides a foundation for the entire team to drive from.

Take advantage of the contents in this book, convert them into a to-do list for your organization.

Get better. Make the number. Keep reading.

Matt Heinz
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01

WHY MORE INBOUND SALES REPS ARE REPORTING TO MARKETING

There was a time when B2B marketers simply focused their efforts on branding and lead generation. Today, marketers are increasingly influencing and managing inbound sales processes through the entire revenue funnel. According to The Bridge Group's recent Sales Development Metrics and Compensation Report, nearly half of inbound-focused sales reps report to marketing.

It's easy to see why this is happening. After all, Marketing already owns much of the technology that can help Sales be successful. For example, while marketing automation systems help nurture and push leads through various buying stages, they're also widely used to distribute and prioritize leads for sales reps.

This eBook is written for marketers who may be managing inbound sales organizations, as well as marketers who are simply interested in learning the best ways to collaborate with Sales to close more revenue. You'll learn how to:

- Maximize ROI with a dedicated inbound sales team
- Use marketing automation and sales acceleration tools to help reps prioritize web leads
- Support sales reps with content through every buying stage
- Track essential metrics that will help you maximize sales ROI

02

INCREASED PRODUCTIVITY THROUGH SALES ROLE SPECIALIZATION

Businesses are experiencing growth by separating sales teams into distinct roles. This enables companies to optimize best practices around each sales role, and to arm each sales role with the tools they need to be successful.

Here are three common sales roles that inside sales teams are separated into:

Lead Qualification Reps (Inbound Sales Reps)
Lead qualification reps are part of an overall inside sales team, but are tasked only with responding to inbound marketing leads. Their goal is to qualify leads and determine whether they are suitable to talk to account executives. This is the part of the sales team that marketing is most likely to manage.

Sales Development Reps (Prospectors)
Sales development reps (SDRs) hunt for new business. They either dial down lead lists or build lists of leads themselves. After discovering sales-ready leads, SDRs frequently turn leads over to account executives to close. Overall, about 24% of SDRs are managed by marketing.

Account Executives (Closers)

Account executives are quota-carrying salespeople who are tasked solely with closing deals. They frequently only sell to prospects once they reach the opportunity stage.

Enable Reps with the Right Tools

One of the main reasons to separate your sales team into distinct roles is because lead qualification reps need different tools than sales development reps (SDRs). SDRs need tools that can help improve email speed, dialing velocity and maximize call connection rates. Lead qualification reps, however, need tools that can help them:

- Prioritize inbound leads from web forms
- Talk to as many leads as possible each day
- Follow up with inbound web leads quickly
- Have deal-winning sales conversations

Manage to Metrics That Fit Each Role

Managers should also be using different metrics to monitor sales reps in different roles. For example, managers of sales development reps need to focus on outbound activity metrics and contact attempts per lead. But when you're managing a team of lead qualification reps, it's more important to track metrics like lead response time and inbound call volume, as well as how many leads, opportunities and inbound calls are resulting from marketing campaigns.

> *Sales acceleration tools can bridge the gap between sales intelligence data and customer calls, by providing representatives with the right data in a useful context – during sales calls.*
>
> Howard Brown
> Founder & CEO, RingDNA

03

HOW TO DETERMINE WEB LEAD PRIORITY

As qualified leads come in, some are bound to be more sales-ready than others. Likewise, some leads may be interested in purchasing a higher product volume or a more expensive product. By responding to the best leads first, your sales reps can close far more revenue.

Unless companies can effectively prioritize those leads, a lot of revenue gets left on the table. So how can you help your sales reps know who to respond to first? It just so happens that the same marketing automation data that marketers use to score leads can be shared with sales reps in real time to help them prioritize those leads.

Timestamp

Whether you're selling real estate or really good technology, the first responder often gets the deal. In fact, according to an MIT study, responding to web leads within five minutes increases contact rates by 900%. That's why the time since the lead was submitted is often the most critical factor in prioritization.

Job Title

While marketers put significant time into creating elaborate customer profiles, for many B2B companies, perhaps no factor is more significant than a job title. Most of the time, for example, a Chief Operating Officer is more likely to be a decision-maker than a Sr. Project Manager. That's why many companies using marketing automation systems ask for the information up front, then adjust lead scores based on job titles that are more likely to represent key decision makers.

Requests for Product Information

Businesses often utilize forms that enable inbound leads to request additional information. These may include contact forms, demo requests and pricing requests. You may find that leads that fill out a particular request form (such as a request for pricing form) are higher value leads than others. Leads requesting specialized information can then be automatically assigned to reps that will prioritize them.

Deal Size Data

For many companies, potential deal size is the primary factor in prioritizing leads. This data can be pulled into a CRM from web form fields or via external sources with an API. Knowing this information can sometimes help those companies identify which leads could turn into the biggest opportunities. More importantly, for companies that only want to sell to businesses of certain sizes (such as "enterprise" or "SMBs"), it can also instantly disqualify some prospects. Assuming demand is high, disqualification is actually a good thing, because it can makes sales reps more efficient.

Overall Lead Score

Marketers frequently use lead scores in order to help determine when leads are ready to hand over to sales - what many companies call "marketing qualified leads." A lead requesting a product demo, for example, may be assigned 20 points, while a lead that clicks in an email may earn just 3 points. It's up to each company to define a lead score threshold that signals Sales that a lead is ready to be contacted by a sales rep. You can enable sales reps to see lead scores via email alerts, or in screen-pops during inbound calls. Reps can also sort by lead score within their CRM.

Other Common Factors

- Company revenue
- Company size
- Time at present job (since new employees often have a mandate for change)
- Recent funding history (since funding typically equates to budget)
- Content engagement type
- Compatible technology used

04

OPTIMIZING INBOUND SALES CALLS

For years, pundits have predicted the death of not only the email, but also the phone call. Nothing could be further from the truth. In fact, BIA/Kelsey estimates $64.6 billion is spent each year across media just to generate calls to businesses. According to *Phone Calls are the New Click*, calls driven by mobile search alone are growing at a 42% compound annual growth rate. The same report reveals that 66.4% of companies surveyed report calls as a high-quality lead source—higher than any other lead source, in fact.

This presents powerful opportunities for marketers to:

- Record and measure all inbound - including web leads and phone leads
- Optimize the marketing campaigns responsible for generating the most valuable calls
- Ensure calls are properly routed to the right sales reps - after all, by the time prospects call you, they're often ready to have a serious conversation

The companies that are best at converting inbound callers into customers will almost certainly experience dramatic growth.

Here's how to optimize inbound sales:

Step 1: Set Up Inbound Call Tracking

Call tracking enables you to measure not only the volume of calls driven by your marketing efforts, but also which of those inbound phone leads turn into customers. Companies use call tracking systems to provision local and toll-free numbers that can then be associated with any online or offline effort. When a call tracking system integrates with a CRM tool such as Salesforce, marketers can finally see which efforts not only drive the most phone leads, but also drive the best phone leads - those that result in the most revenue.

Step 2: Measure and Monitor

Measure and monitor both the volume and results of calls coming in. The concept is the same as measuring web leads - you'll want to see how many leads are coming in, how many are qualified, how many opportunities are being generated from those phone leads, and - most importantly - which marketing efforts are driving the most revenue. If you're like most companies, you'll uncover amazing new data about your investments that is sure to influence your strategy.

Step 3: Optimize Call Routing

As you get more data, you'll soon see that much like web leads, not all inbound calls are created equal. Depending on how your sales organization is structured, there are different call routing options that can help your team maximize inbound sales revenue. Here are four of the most common call routing considerations:

Availability-Based Routing

If you're lucky enough to have a group of similarly-skilled reps, routing inbound calls based on the first-available agent is often the best option.

Skills-Based Routing

Some companies employ what's known as skills-based routing in order to route callers to the most qualified sales agent available. For example:

- *Product* - Send callers from specific product marketing sources to reps with matching product expertise
- *Close Ability* - Route calls from certain high-value marketing campaigns to the most experienced closers

Time-Based Routing

The most important factor in inbound sales is making sure someone is available to take calls.

For that reason, time-based routing is based on the time of the incoming call. This helps companies spanning various locations ensure that there's always a sales rep able to speak to an interested prospect. For example, companies with offices nationwide might route callers to an office on the east coast during hours that west coast offices aren't open. During hours that neither office is open, calls could be routed to a 24-hour call center.

Interactive Voice Response (IVR)

IVR systems - commonly known as telephone "menu options" - often annoy sales prospects, but do reduce costs. The main benefit of IVR systems to sales teams is ensuring that they don't handle many billing or customer support calls, and can do what they were trained to do: sell.

Step 4 (Advanced): Use CTI to Provide Reps with Prospect Data in Real Time

By pairing call tracking, CRM and CTI, inside sales reps can be presented with a "screen pop" of contextually relevant information that can help them have more successful conversations. For example:

- The prospect's geolocation
- The prospect's title and company information
- The web page or marketing source they viewed prior to calling
- Search keywords
- Past engagement history
- Past purchasing history
- Social media data
- Suggested talking points

What does this all boil down to? With the right data presented to sales reps at the time of an inbound call, reps can often understand a caller's intent before the first words are even spoken. And that gives sales reps the edge they need to qualify leads more successfully, and if appropriate, create opportunities.

05

HOW TO SUPPORT SALES WITH CONTENT

While great prescriptive, educational content is effective for generating leads and building brand loyalty, marketers can also use a variety of content marketing tactics to support sales. Here's how to expertly support sales with marketing content:

Step 1: Create Content that Aligns with Roles and Buyer Stages

When executed strategically and used as a part of nurturing campaigns, content can be used to guide buyers through various stages of the sales funnel. Be sure to create a library of blogs, videos, eBooks and other content that can appeal to leads at various buyer stages including:

- **Awareness Stage** - prospects that might not even be aware of a solution
- **Information Stage** - top-of-the-funnel leads seeking information
- **Decision Stage** - leads on the verge of making a buying decision
- **Action Stage** - leads that are ready to purchase

As an example, imagine that you sell high-end telescopes and you put out two eBooks: the first is called *20 Must-see Celestial Sites*. This eBook is aimed at stargazing enthusiasts who are gathering general information online. The second eBook, however, is called *The Amateur Astronomer's Guide to Buying a Telescope*. This is aimed at leads that are on the verge of making a buying decision.

This content doesn't just provide Marketing a way to generate leads. In the case of the second eBook, it also gives your sales reps something useful and educational to send leads they're already in contact with.

Step 2: Set Up Alerts for Sales

As leads engage with content, help your sales reps sell more by setting up notifications at interesting moments. For example, when a lead downloads content that identifies them as being potentially sales-ready (such as *The Amateur Astronomer's Guide to Buying a Telescope*) you could also set up alerts that notify your reps that a potentially hot lead just downloaded content. This will help sales reps reach out to the right leads at the right time.

Step 3: Create Email Templates that Can be Customized and Personalized

It's important for sales reps to send great emails when responding to inbound leads. And while some sales reps are intrinsically great writers, there are also a lot of sales reps who have masterful verbal communication skills, but aren't as strong when it comes to crafting emails that trigger a high rate of response.

Marketers can help by crafting email templates that are not only engaging and eloquent, but also perfectly aligned with any messaging that marketing might be sending.

Step 4: Create Industry-Specific Content

If your sales team is targeting specific industries - or niches within the main industry you sell to - specialized documents that demonstrate that your business "specializes" in that niche can help. As an example, let's imagine that you are generating a large number of leads in the real estate industry. You could create a one-page document that shows how your solution solves pain points in the real estate industry. Equally effective is an outstanding case study within that industry with one customer singing your praises. The more hard metrics you can show, the more effective the content will be.

06

VITAL SALES METRICS FOR INBOUND MARKETERS

Tracking the right metrics gives you the ability to gauge the success of your efforts. More importantly, it also helps you predict which efforts will deliver the best returns going forward. And while you may be tracking marketing-focused metrics like cost-per-click or cost-per-lead, you need to go further in order to truly enable sales.

Qualified Lead Velocity Rate

Marketers should be tracking the sheer number of qualified leads (calls and web leads) they are handing over to sales reps each month. Qualified Lead Velocity is an essential metric for aligning Sales and Marketing, and marketers need to ensure that inbound sales teams always have enough leads to work. Improving the number of qualified leads month-over-month often correlates with increased sales ROI.

Lead Response Time

Marketers often invest heavily in organic and paid search in order to inspire leads to call and fill out forms. But when those leads do reach out to your company (and don't connect with a live rep in real time) are sales reps responding quickly enough? Data from *Harvard Business Review* reveals that sales reps are seven times more likely to have a meaningful conversation with prospects if they call back within the first hour.

Inbound Leads by Campaign

It's important to know how many inbound calls and web leads are being generated by each marketing campaign. This can help you predict how many reps will be needed to respond to inbound phone leads from various campaigns. However, it's also important to tie calls to revenue, because you don't want to invest in campaigns that drive a lot of calls from unqualified leads.

Inbound Leads by Keyword

Marketers routinely track which paid search keywords result in web leads. But it's just as important to track which keywords are generating calls, since inbound phone leads are often sales-ready. By using a marketing automation solution and a call tracking tool, marketers gain 360 degrees of visibility into which keywords are driving valuable leads.

Inbound Calls by Time of Day

Is your lead qualification team properly staffed to respond to incoming calls? Tracking call volume by time of day can help marketers work with sales managers to ensure that no hot inbound leads fall through the cracks. By using intelligent call routing, marketers can help ensure that leads are always routed to the right reps or queues while minimizing hold time. This can have a profound effect on inbound call conversions.

Opportunities by Campaign

Are your efforts providing account executives with the right number of opportunities they need to meet their quotas? If marketers are generating a mass of leads, but too few opportunities it can indicate that there is either a problem with lead quality, or it means that your inbound sales reps need to do a better job of advancing leads to the opportunity stage. When there's a dearth of sales-qualified opportunities, sales and marketing leaders need to collaborate to ensure that marketing efforts are generating quality inbound leads.

Average Lead-to-Close Time

How long are inbound leads taking to close? There's no one-size-fits-all answer to the correct number, since every industry is different. If your time-to-close metrics aren't to your liking, however, it's a great time to see whether increased marketing automation utilization or sales coaching can help.

Average Size of Closed/Won Deals by Campaign

Which efforts are driving your biggest deals? This is your opportunity to measure quality, not quantity. Before you curtail marketing investments that don't seem to be driving much volume, make sure you see whether the few leads they are driving tend to be high-end.

07

INSIDE SALES GLOSSARY

Automatic Call Distributor (ACD)

An automatic call distributor (ACD) tool that can route inbound calls to individual agents or queues based on preestablished criteria such as the time of day that a caller dials a business. While call routing engines began as hardware solutions, they have evolved over time. There are many levels of sophistication to routing engines. The most powerful ACDs can integrate with a call tracking solution in order to automatically route inbound calls based on specific advertising channels and even from specific Google keywords.

Call Tracking

Call tracking systems allow marketers to measure the value of inbound calls driven by their marketing efforts. The technology enables companies to instantly and cheaply create local or toll-free phone numbers, then associate those numbers with ads, web pages, search keywords or any effort. The results are then tracked and measured, typically in a CRM.

Computer Telephony Integration (CTI)

In the context of inbound sales reps, computer telephony integration (CTI) is a term that can be used to describe technology that can trigger a screen pop on a rep's browser with every inbound call. The screen pop can provide sales reps with valuable contextual information about inbound callers including lead referral sources, communications or purchasing history and relevant call scripts.

Inside Sales

Inside sales refers to sales reps that are primarily selling remotely, rather than traveling in person to see customers. In contrast to traditional call center agents, inside sales reps are highly trained to answer industry-specific questions, technical questions about products and solve specific customer pain points.

Lead Nurturing

Lead nurturing is the process of providing B2B leads with content that is intended to build trust, brand loyalty and often, educate. The ultimate goal is to stay front-and-center of the prospect until they are more sales-ready. Leads nurturing is often handled by marketers using drip campaigns and other tactics.

Lead Prioritization

Lead prioritization is the process of using data to determine the order in which leads should be responded to. As leads download content, fill out forms and visit web pages, a marketing automation tool can keep track of a lead score. This lead score can then be shared with reps in real time, to help lead qualification reps determine which inbound sales leads are the most sales-ready.

Lead Qualification

Lead qualification is the process of determining whether inbound leads are suitable for sales. The process of lead qualification usually involves both automated fact-finding and asking a series of questions to determine a lead's budget, authority, needs and implementation timeframe.

Lead Qualification Rep

A lead qualification rep (also known as a marketing qualification rep, or inbound sales rep) is a rep that is solely responsible for responding to inbound leads that arrive via web form, inbound call, social media or a similar channel.

Lead Scoring

Lead scoring is a shared Sales and Marketing methodology for ranking leads in order to determine their sales-readiness. Leads are scored based on the interest they show in your business, their current place in the buying cycle and their fit in regards to your business.

Marketing Automation

Marketing automation is a category of software that automates repetitive tasks across a number of online marketing channels including email, social media, websites and more. A marketing automation system can improve a variety of marketing practices including lead generation, lead nurturing, lead scoring, segmentation and marketing ROI measurement.

Sales Acceleration

Sales acceleration technology is a category of software that's designed to increase the velocity of sales by helping reps identify hot prospects, connect with them more successfully and increase productivity during the selling process. Specific tools include specialized dialers, email tracking, market intelligence data and more.

Sales Trigger

A sales trigger is a signal that a company or individual at a company is interested in change. Examples of triggers include executive changes, new funding and product launches. Inbound triggers can include content downloads, search keywords or form submissions. These triggers can be used as lead scoring metrics to help reps prioritize which leads are most sales-ready.

Acceleration thru Automation

7 Top Things to Automate

1. Lead Scoring
2. Lead Distribution
3. Email Logging
4. Email Creation
5. Outbound Dialing
6. Call Logging
7. Leaving Voicemails

About Heinz Marketing

Heinz Marketing is a Seattle marketing agency focused on sales acceleration. Heinz Marketing helps clients achieve sustained sales success by growing revenue from existing customers and cost effectively identifying and winning new customers.

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Learn More About Heinz Marketing

Interested in learning more creative ways to make the most of your marketing? Request your FREE 10-minute brainstorm at www.10minutebrainstorm.com.

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“Simply the best inside sales solution for Salesforce.

Sean Whiteley
Founder, GetFeedback & Former GM, Salesforce

“RingDNA call data is something we could not live without.

Erik Kostelnik
Global Sales Director, Wrike

“RingDNA was our best sales productivity investment this year.

Scott Clugston
Director Sales, FreshBooks

“I have used InsideSales, Ring Central and Five9 in the past, and now we have the team on RingDNA. It has been a fantastic experience. Really the best product that I have used with SFDC.

Dallas Hogensen
Vice President of Sales & Expansion, iCracked Inc

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