How to Use Sales Enablement to Drive More Client Value

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SQUARE 2 MARKETING

HOUSEKEEPING

1. Webinar is being recorded
2. Slides will be available after the presentation
3. Ask questions using the GTW chat panel
4. Q&A will be at the end

AGENDA

1. Intros
2. Webinar Goals
3. What is Sales Enablement & Why Should we do it?
4. How to Use Sales Enablement to Drive Client Value
5. How to Sell Sales Enablement to Your Clients
6. Sales Enablement Walkthrough
7. How Do I Charge for Sales Enablement?
8. Next Steps / Q&A

1 INTRODUCTIONS

YOUR HOSTS

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SQUARE 2 MARKETING

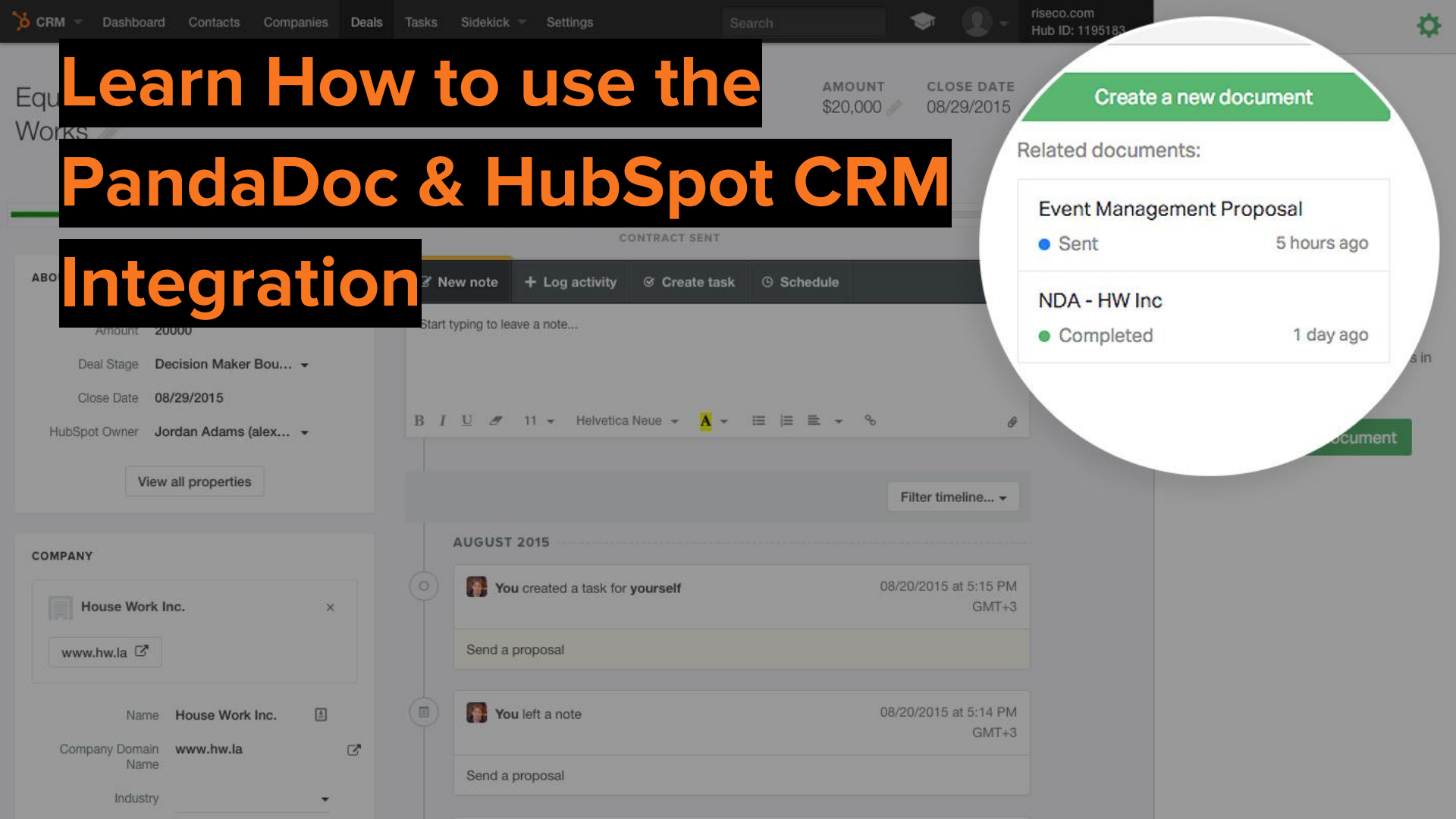
2 GOALS

Understand Sales Enablement and its Benefits

Learn Specific Use Cases

Discover Strategies for Selling Sales Enablement to Clients

Learn How to use the PandaDoc & HubSpot CRM Integration



3 WHAT IS SALES ENABLEMENT & WHY SHOULD WE DO IT?

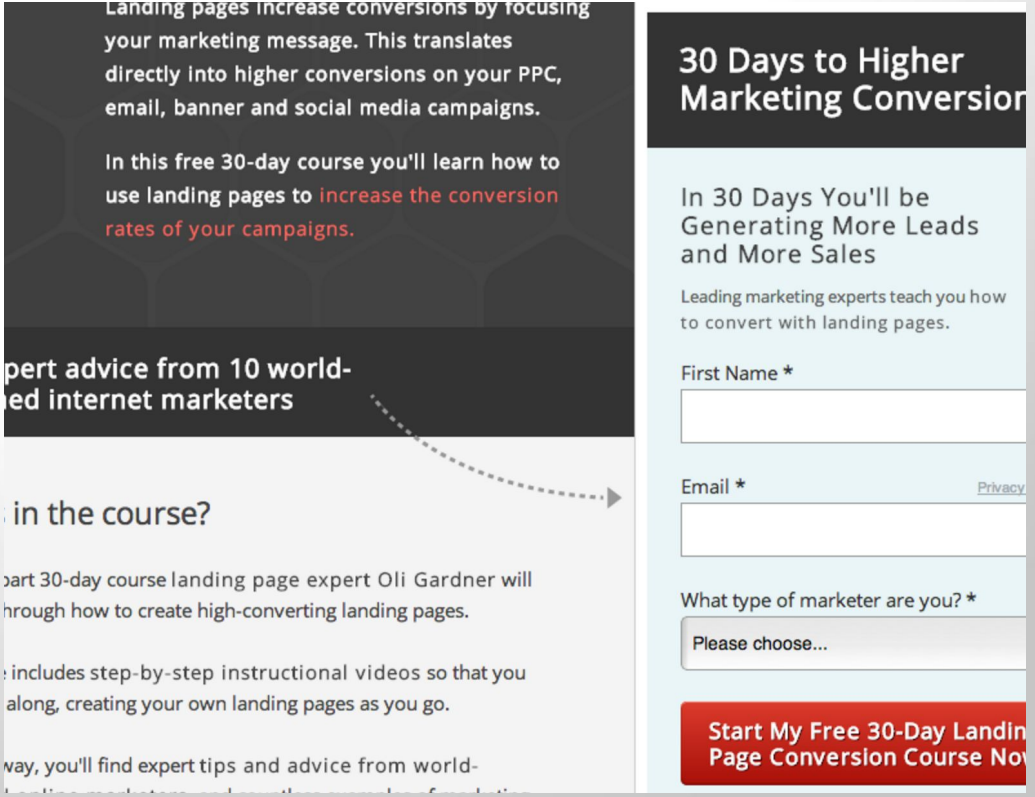
Sales Enablement is...

The processes, technologies, and **sales content** that improve the performance of the sales organization.

Visitor Converts to a Lead

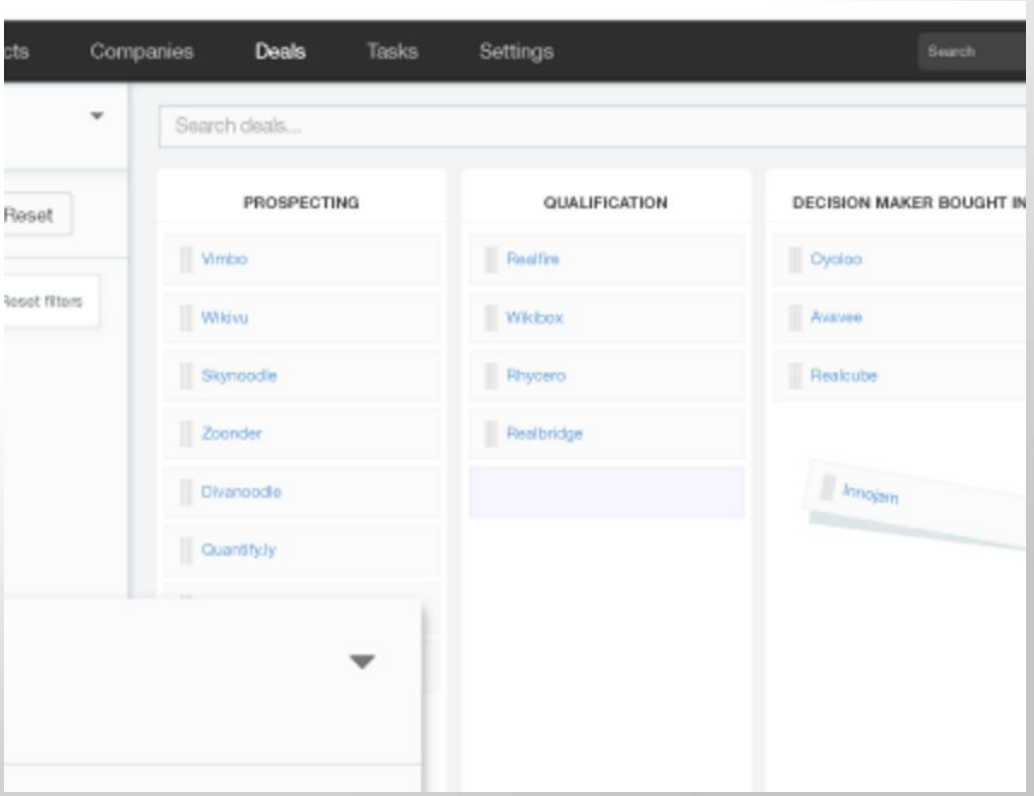
Need to Know:

1. Customer data
2. Lead routing
3. Rules of engagement



Qualification Process & Sales Stages

- Who is a good lead, who is not?
- What is the process?
- What are the stages?



Sales Content

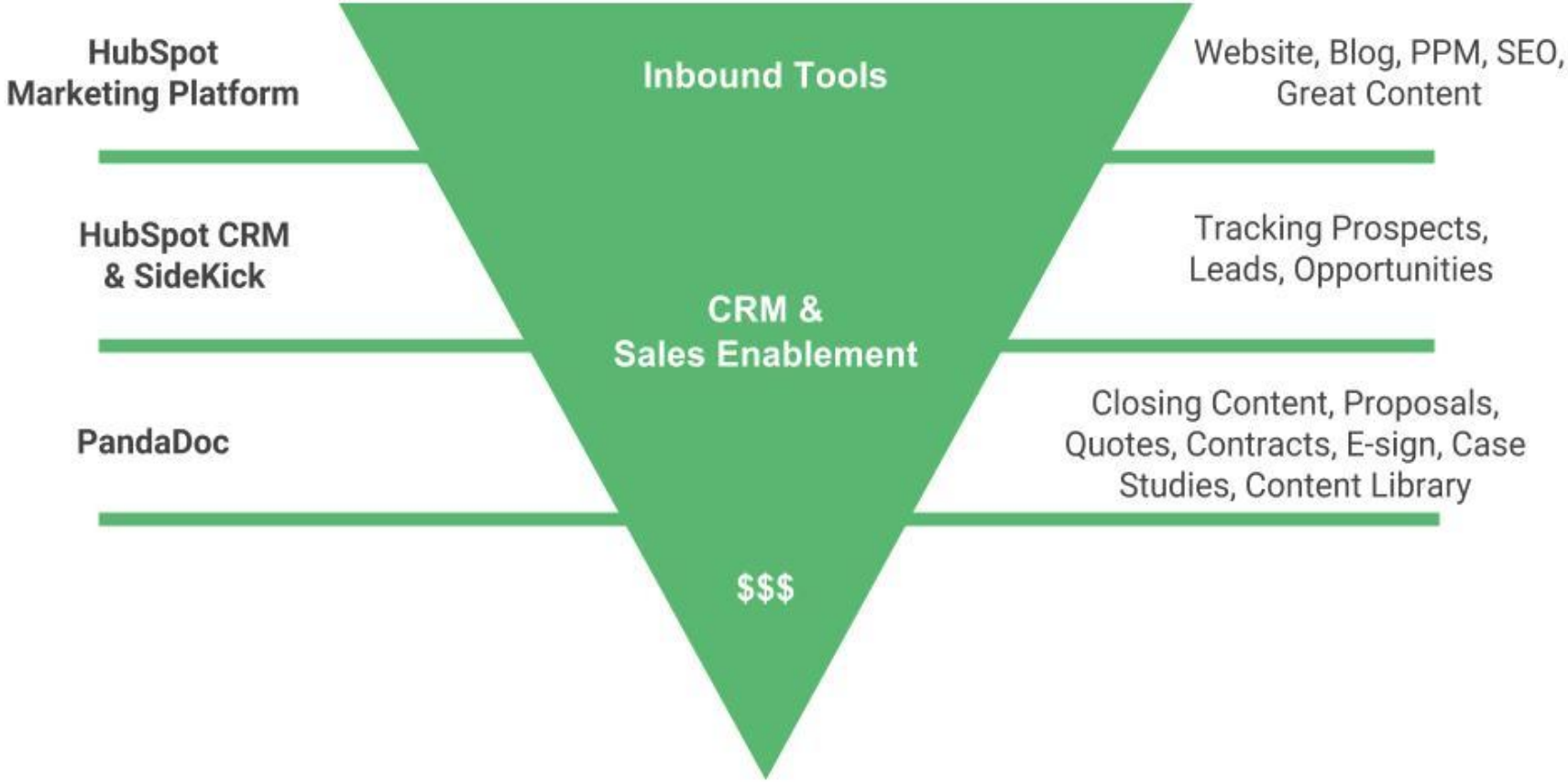
- Proposals, Quotes, Contracts
- Modular Content
- Closing Conversion

Sales Content

Technology

- HubSpot CRM (+ Addons)
- Sidekick
- PandaDoc

The Inbound Sales Funnel



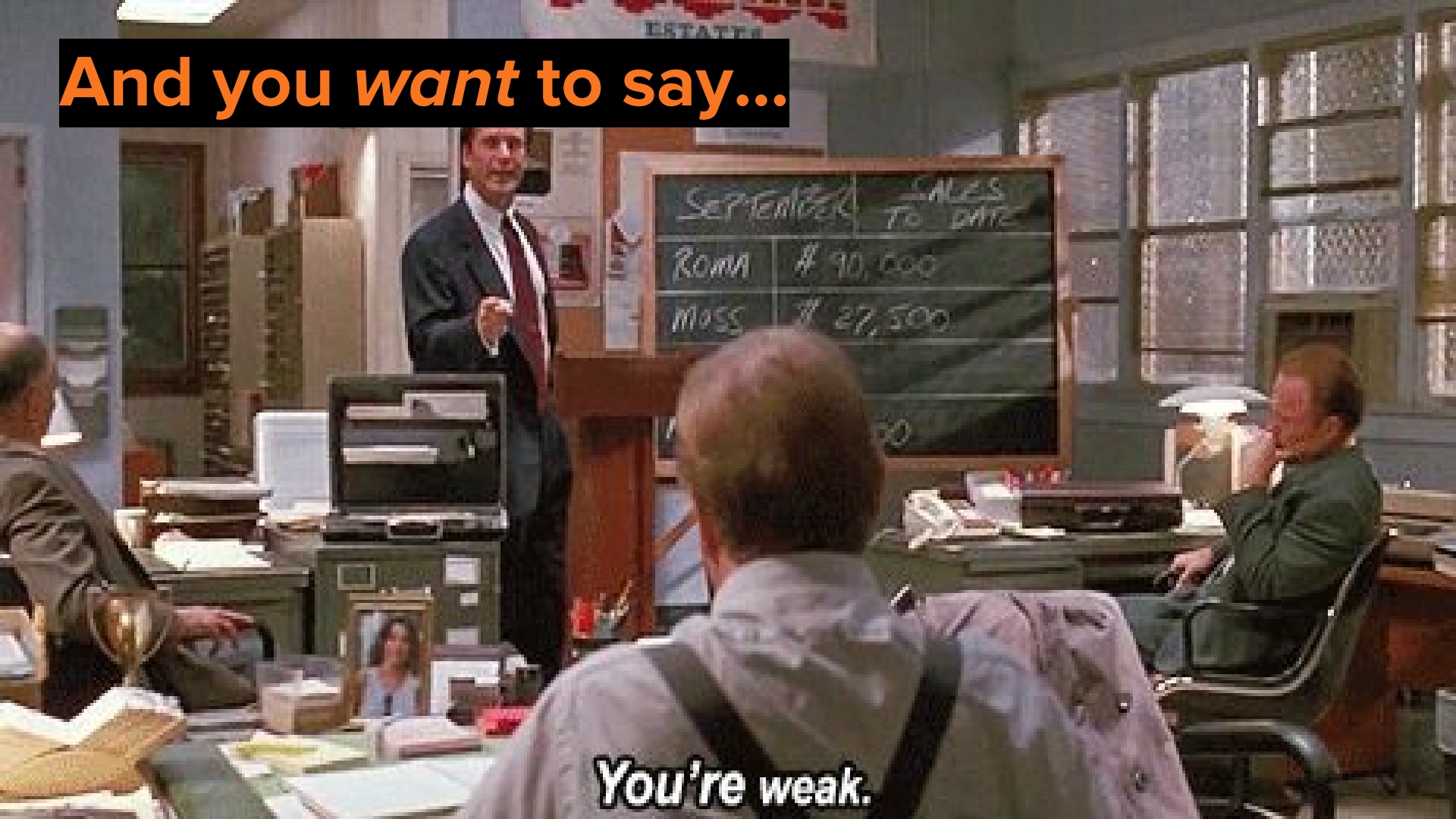
Why do Sales Enablement?

The Top 5 Reasons to Start

1.) Inbound Marketing Efforts are Vulnerable

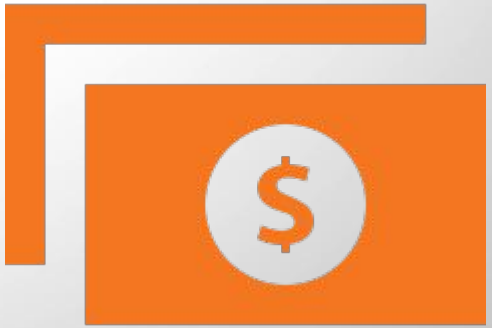
With no insight, budget, or control over the quality of the sales process or sales content, your agency is blind, powerless, and prone to churn.

You bring clients leads
& they say...
The leads are weak!

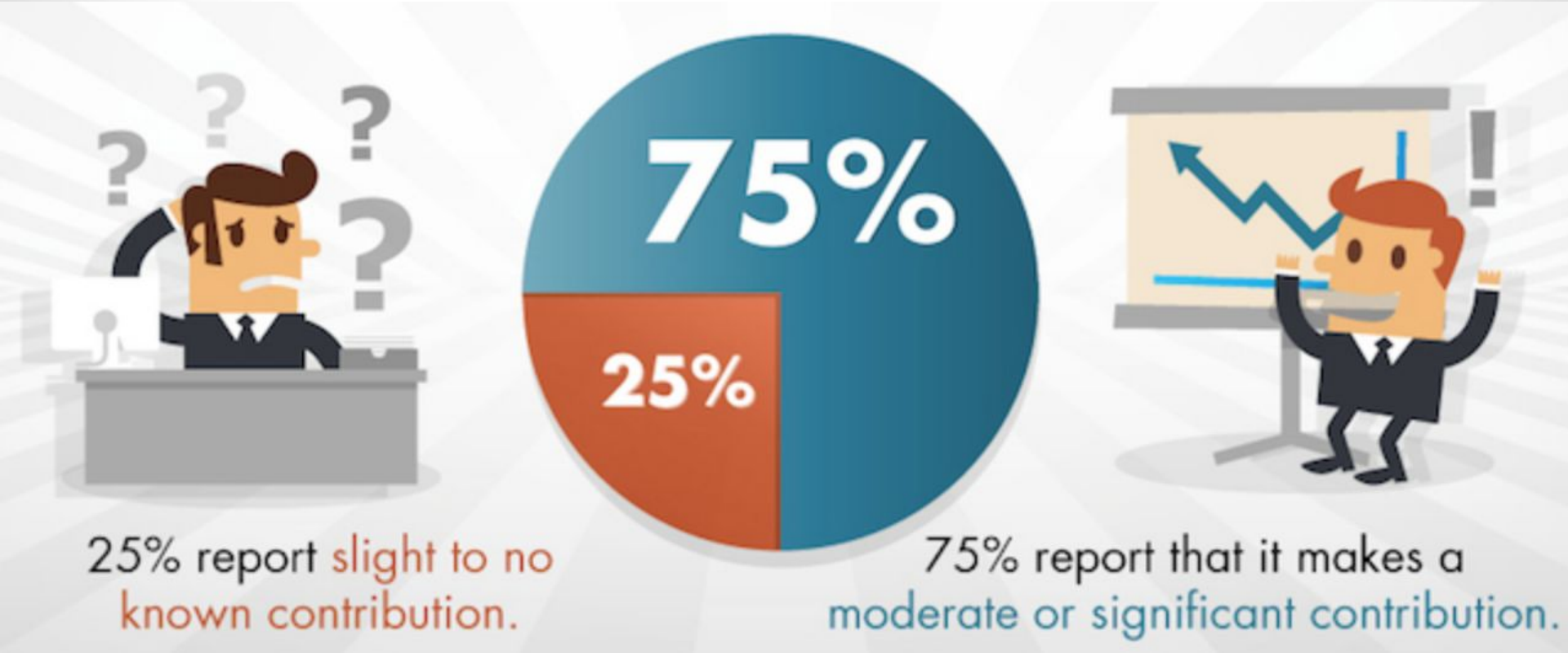

And you *want* to say...
SEPTEMBER
SALES TO DATE
ROMA
MOSS
You're weak.

2.) Exposure to Sales Budgets

- Opportunities have more value than leads.
- Sales organizations often have higher budgets than marketing.
- Increase LTV of clients.
- Be seen as a revenue engine.



3.) It Works


75%
25%
25% report slight to no known contribution.
75% report that it makes a moderate or significant contribution.

4.) Competition

- Less than 30% of SMBs have **any** Sales Enablement.
- Lots of thought leadership, very few “doers.”
- Shows you care about winning for clients.

5.) Content Dictatorship

- Control over sales collateral – both design & content quality
- Recurring sales content needs
- Accountability = control

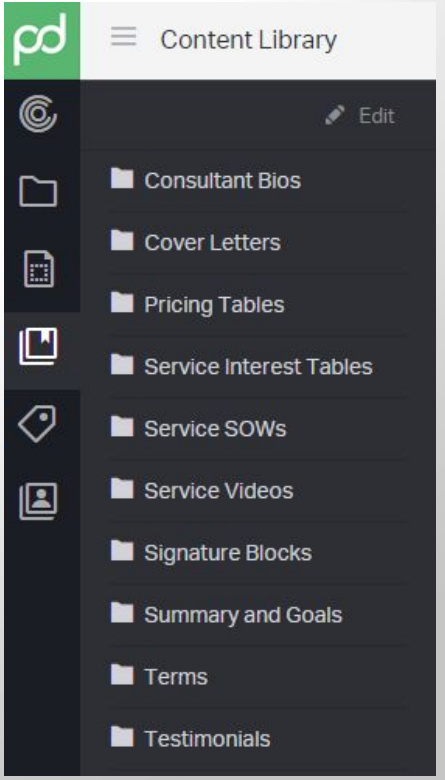
4 HOW TO USE SALES ENABLEMENT TO DRIVE CLIENT VALUE

Sales Content Strategy and Process (A Knowledge Product)

Increase close rates by tailoring proposals to buyer personas.

What does your content need to say...

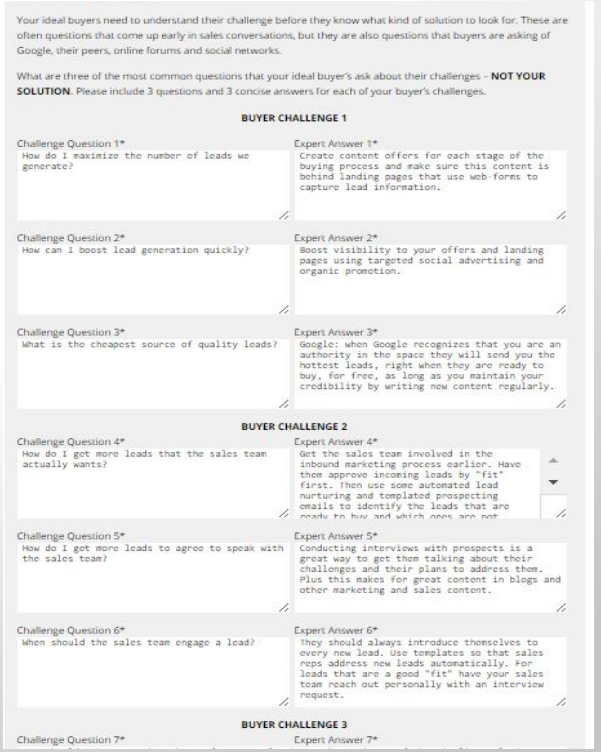
- At each stage of the buying process?
- For each persona?
- For each industry?
- For each product/service?



Sales Content Strategy and Process (A Knowledge Product)

Steps to build a sales enablement strategy and process.

1. Buyer Persona Questionnaire
2. Match needs with content
3. Match content with stages of the sales process
4. Match sales tasks with stages
5. Implement process in CRM



Your ideal buyers need to understand their challenge before they know what kind of solution to look for. These are often questions that come up early in sales conversations, but they are also questions that buyers are asking of Google, their peers, online forums and social networks.

What are three of the most common questions that your ideal buyer's ask about their challenges - **NOT YOUR SOLUTION**. Please include 3 questions and 3 concise answers for each of your buyer's challenges.

BUYER CHALLENGE 1

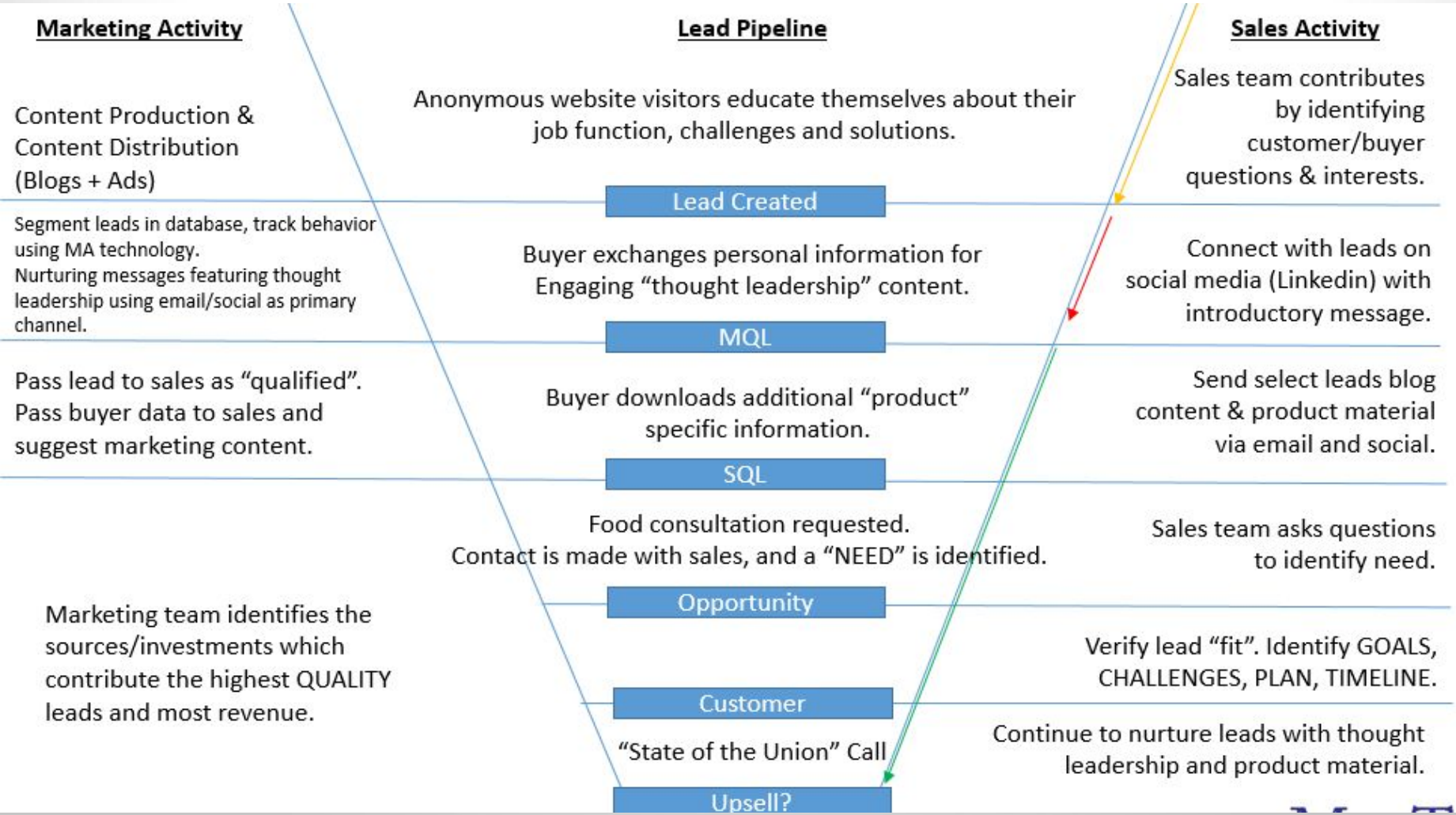
Challenge Question 1*	Expert Answer 1*
How do I maximize the number of leads we generate?	Create content offers for each stage of the buying process and make sure this content is behind landing pages that use web-forms to capture lead information.
Challenge Question 2*	**Expert Answer 2***
How can I boost lead generation quickly?	Boost visibility to your offers and landing pages using targeted social advertising and organic promotion.
Challenge Question 3*	**Expert Answer 3***
What is the cheapest source of quality leads?	Google: when Google recognizes that you are an authority in the space they will send you the hottest leads, right when they are ready to buy, for free, as long as you maintain your credibility by writing new content regularly.

BUYER CHALLENGE 2

Challenge Question 4*	Expert Answer 4*
How do I get more leads that the sales team actually wants?	Get the sales team involved in the inbound marketing process earlier. Have them approve incoming leads by "fit" first. Then use some automated lead nurturing and templated prospecting emails to identify the leads that are ready to buy and which ones are not
Challenge Question 5*	**Expert Answer 5***
How do I get more leads to agree to speak with the sales team?	Conducting interviews with prospects is a great way to get them talking about their challenges and their plans to address them. Plus this makes for great content in blogs and other marketing and sales content.
Challenge Question 6*	**Expert Answer 6***
When should the sales team engage a lead?	They should always introduce themselves to every new lead. Use templates so that sales reps address new leads automatically. For leads that are a good "fit" have your sales team reach out personally with an interview request.

BUYER CHALLENGE 3

Challenge Question 7*	Expert Answer 7*


Marketing Activity
Lead Pipeline
Sales Activity
Content Production & Content Distribution (Blogs + Ads)
Anonymous website visitors educate themselves about their job function, challenges and solutions.
Sales team contributes by identifying customer/buyer questions & interests.
Lead Created
Segment leads in database, track behavior using MA technology.
Nurturing messages featuring thought leadership using email/social as primary channel.
Buyer exchanges personal information for Engaging "thought leadership" content.
Connect with leads on social media (Linkedin) with introductory message.
MQL
Pass lead to sales as "qualified". Pass buyer data to sales and suggest marketing content.
Buyer downloads additional "product" specific information.
Send select leads blog content & product material via email and social.
SQL
Food consultation requested.
Contact is made with sales, and a "NEED" is identified.
Sales team asks questions to identify need.
Opportunity
Marketing team identifies the sources/investments which contribute the highest QUALITY leads and most revenue.
Verify lead "fit". Identify GOALS, CHALLENGES, PLAN, TIMELINE.
Customer
"State of the Union" Call
Continue to nurture leads with thought leadership and product material.
Upsell?

Sales Content as a Service

Make it easy for the sales team to use the content available to them.

- Build it
- Organize it
- Train with it
- Measure it

Sales Intelligence with PandaDoc & HubSpot CRM

Give every sales person the gift of **perfect timing**!

Sales notifications:

- Returning website traffic (HubSpot)
- Sales email tracking
- Proposal views & tracking

5 HOW TO SELL SALES ENABLEMENT TO YOUR CLIENTS

Major pain points

- Poor lead conversion
- Sales productivity
- Sales doesn’t use marketing content

Value of your solution

*Help the sales team **gain trust** with qualified buyers.*

*Make it **easier & faster** to build better proposals that **close more business**.*

Sell on Existing Content Efforts

Tactic: Hey client, we are creating great marketing content that your buyers love, but we want to make sure the sales team uses it to close more deals!

Conversation guide

- *Let's talk about how many qualified leads actually turn into new business.*
- *Let's talk about how much time your sales team spends on content.*
- *Let's ask your sales team what content they think would help close more deals.*

6 SALES ENABLEMENT with HubSpot + PandaDoc

Jump right in...

7

HOW DO I CHARGE FOR SALES ENABLEMENT SERVICES?

Sample Sales Enablement Services

Strategy & Process + CRM implementation: **$5-10k**

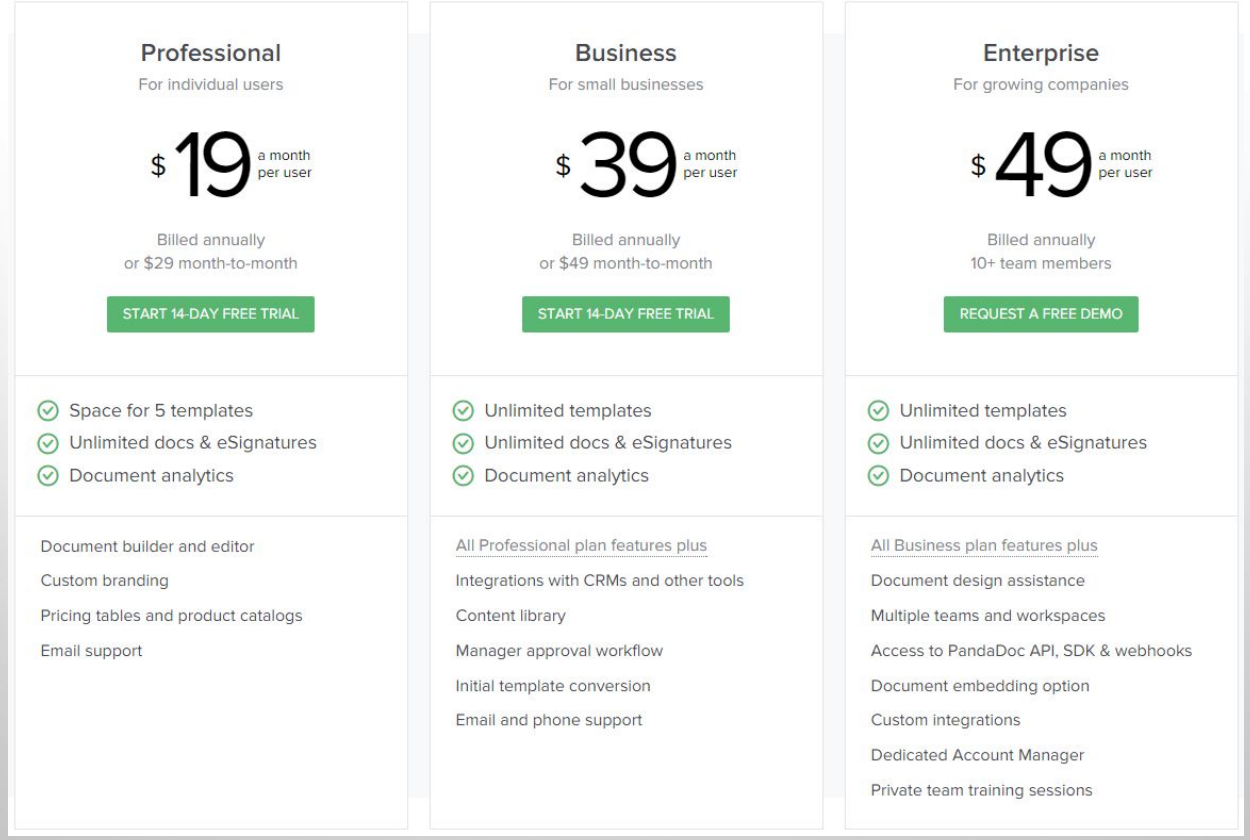
Sales Content as a Services:

- Monthly sales support, measurement and recommendations: **$2,500/month**
  - Alternative is to charge per sales “seat” (for large organizations)
- Content production
  - Template design and writing (Project)
  - Content production (Projects or Retainer)

PandaDoc's Agency Partner Program

- **PandaDoc** Training
- **Product/Service** Development
- Help **selling** your products/services
- Help **marketing** your products/services
- 20% lifetime client **revenue share**

PandaDoc Pricing



Professional

For individual users

$19 a month per user

Billed annually
or $29 month-to-month

START 14-DAY FREE TRIAL

- Space for 5 templates
- Unlimited docs & eSignatures
- Document analytics

Document builder and editor
Custom branding
Pricing tables and product catalogs
Email support

Business

For small businesses

$39 a month per user

Billed annually
or $49 month-to-month

START 14-DAY FREE TRIAL

- Unlimited templates
- Unlimited docs & eSignatures
- Document analytics

All Professional plan features plus
Integrations with CRMs and other tools
Content library
Manager approval workflow
Initial template conversion
Email and phone support

Enterprise

For growing companies

$49 a month per user

Billed annually
10+ team members

REQUEST A FREE DEMO

- Unlimited templates
- Unlimited docs & eSignatures
- Document analytics

All Business plan features plus
Document design assistance
Multiple teams and workspaces
Access to PandaDoc API, SDK & webhooks
Document embedding option
Custom integrations
Dedicated Account Manager
Private team training sessions

8

RESOURCES
NEXT STEPS
Q&A

Resources

1. Webinar Slide Deck / Recording
2. PandaDoc's Inbound Marketing Proposal Template
3. PandaDoc Partner Program
4. Get PandaDoc | Get HubSpot CRM
5. PandaDoc + HubSpot CRM Integration

Get them all at: http://bit.ly/se-resources

Next Steps

Sales Enablement Consultation:
Jared@PandaDoc.com

PandaDoc

QUESTIONS?

THANK YOU.