Volume 2
Fall 2019

# SEG

ACCELERATING GROWTH

## Sales Leadership

**You want to be a leader, but can you handle the truth?**
**See how you can succeed on Page 3**

# Letter from CEO

Brian O'Neil
CEO and Founder

We are excited to release Sales Empowerment Group's Fall Edition Magazine – Truth. Over the past decade, SEG has worked alongside hundreds of sales and marketing leaders. The number one issue we see is misalignment between marketing and sales leaders on what is factual. We have found that this can be very frustrating for all parties involved. In this issue, we will focus on those misperceptions and share best practices on better ways to align all parties. This will allow marketing and sales leaders to focus on hitting their number in 2020.

Thank you,
Brian O'Neil

[Download Issue #1]

# You Want to be a Leader, But Can You Handle the Truth?


After being fortunate enough to be in positions of leadership for over 30 years, my experience taught me the truth of why leaders fail and succeed. Many truths about leadership are not so popular but when combined and executed consistently, they are very powerful. I have woven the following into my style of leadership, and they have served me well. Wouldn't it be terrific to learn what you have found to be true?

## Keep the right people upset with you

Great leadership involves responsibility to the welfare of all employees which means that some people will get angry at your actions and decisions.  It's inevitable; embrace it. Trying to get everyone to like you is a sign of mediocrity and you'll be driven to avoid the tough decisions. You'll avoid confronting the people who need to be confronted and worst of all, you'll avoid offering differential rewards based on differential performance because some people might get upset. Ironically, by procrastinating on the difficult choices, by trying not to tick anyone off and by treating everyone equally regardless of their contributions, you'll simply ensure that the only people you'll wind up angering are the most creative, productive and successful people in the organization.

## Obsess over the details

Strategy equals execution.  All the great ideas and visions in the world are worthless if they can't be implemented rapidly and efficiently. Good leaders delegate and empower others liberally, but they pay attention to details every day.  (Think about winning athletic coaches like Bill Belicheck, Phil Jackson, Pat Summitt and Mike Krzyzewski).

## Coach K Surpasses Pat Summitt as Winningest Division I Coach

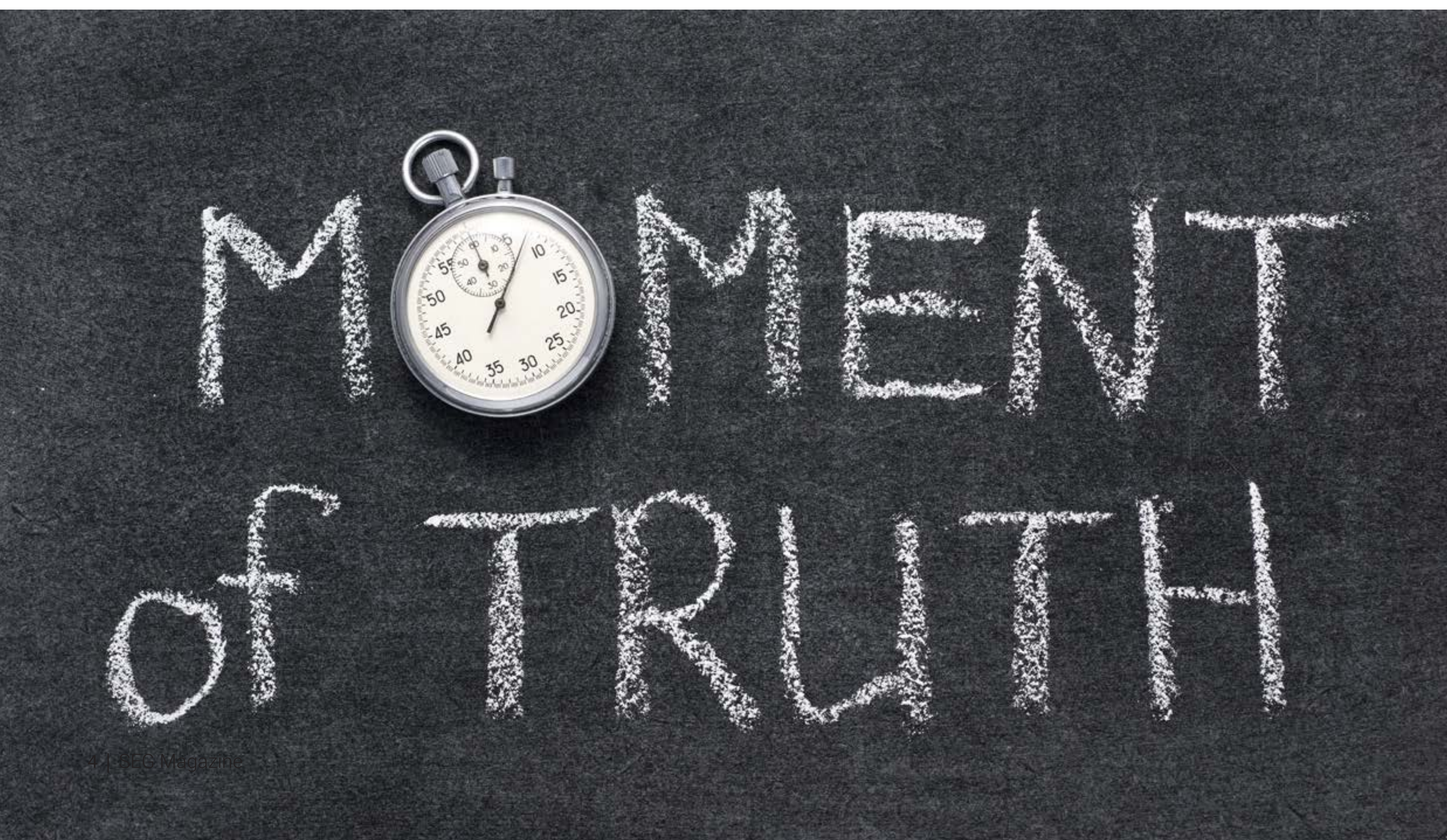
Bad leaders, even those who fancy themselves as progressive visionaries, think they're somehow above operational details. Oddly enough, good leaders understand something else – an obsessive routine of carrying out details begets conformity and complacency, which in turn dulls everyone's mind.  That is why even as they pay attention to details, good leaders continually encourage people to challenge the process. They implicitly understand the sentiment of CEO leaders like Jeff Bezo's and the late Steve Jobs who independently have said in not so many words--the job of a leader is not to be the chief organizer but the chief dis-organizer

## Spend more time with your employee who actually provide you lift

In a brain-based economy, your best assets are people. While we have heard this expression so often, I'm don't feel many leaders really do much to ensure their people feel this way. I have not seen many leaders really put in the time necessary to ensure their people consistently know their value to the firm. Too often, people are assumed to be empty chess pieces to be moved around by visionary leaders, which may explain why so many top managers immerse their calendar time in deal making, restructuring and the latest management fad. How many immerse themselves in the goal of creating an environment where the best, the brightest, the most creative are attracted, retained, and – most importantly – unleashed?

## Don't be afraid to break it

I have found too often; real change is stifled by people who cling to familiar ways and job descriptions. One reason that even sizable organizations don't innovate, or grow is that their leaders won't challenge old, comfortable ways of doing things. But real leaders

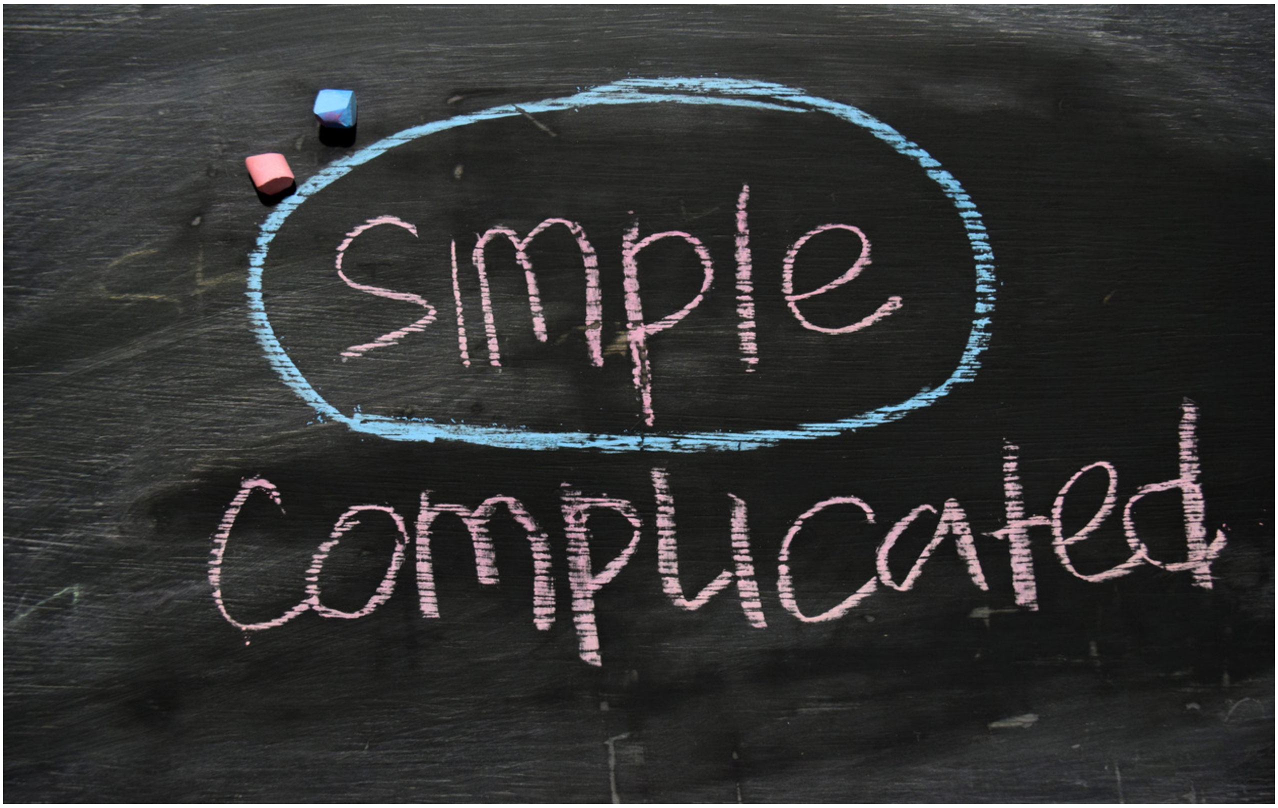


understand that the speed at which competition, markets and people's tenure change is so rapid that the reality is most of our jobs are becoming obsolete.  The best way to keep everything moving in a positive direction is to make our activities obsolete before someone else does. Effective leaders create a climate where people's worth is determined by their willingness to learn new skills and grab new responsibilities, thus perpetually reinventing their jobs. The most important question in performance evaluation becomes not, "How well did you perform your job since the last time we met?" but, "How much did you change it?"

## They will follow a clear path

Effective leaders understand it is critical to keep your messaging simple and to the point.  You must articulate vivid, over-arching goals and values, which you can use to drive daily behaviors and choices amongst competing alternatives.  Your vision and priorities are lean and compelling, not cluttered and buzzword-laden.  Your decisions must be crisp and clear, not tentative and ambiguous.  If you convey an unwavering firmness and consistency in your actions, aligned with the picture of the future you paint, the result will be clarity of purpose, credibility of leadership and integrity in organization.

Certainly, there are more than 5 truths to great leadership but getting comfortable with the ones I have bought into, will position you as a respected leader and give you higher probability of success.




Kevin Potrzeba

PRESIDENT

Dave Falter,
President, RoomIt

INTERVIEW

# A conversation on Accelerating Revenue Growth

**Q:** Tell us about your business model at RoomIt.

**A:** We are a technology platform designed to provide next generation, employee travel services to clients of our parent Carlson Wagonlit Travel (CWT) and their 10MM business travelers. We also have a growing emphasis on non-CWT clients in the form of white label partnerships and we are preparing to enter the SMB market which represents a significant amount of hotel consumption.

**Q:** How do you think about revenue growth at RoomIt?

**A:** We look at it a couple of ways, we want more travelers to book their hotel with us versus online travel agencies, etc. We also want to find new hotel volumes within the unmanaged corporate travel marketplaces. One way is to squeeze more juice out of the lemon and the other is by finding more lemons.

**Q:** What are your most important levers for accelerating revenue growth?

**A:** One is personalization – using technology and mathematics strategy to put the best choices in front of the traveler and make it easy for them to buy. Also, how we negotiate relationships with corporate supply agreements is an important driver of revenue.

**Q:** What key insight have you learned and applied to improve your sales process?

**A:** We need to be more deeply embedded in the discovery process when we talk to new corporate clients and renewals. Many of our potential customers don't understand the opportunities they have to improve traveler compliance, supplier negotiations, pricing, safety and security. Our offering will help companies know where their travelers are at any given time. It's critical to get into that conversation early, helping customers

**Q:** How important is creating good content to your business?

**A:** We have an obligation to generate quality content for both our customers and our employees. It's important that our sales people have a robust set of tools to understand the competitive milieu such as savings calculators and being able to speak to our technology advantages. It's very important to provide clarity around our key points of difference

**Q:** What does a prospect need to know about your offering before they will convert into a customer?

**A:** There is a spectrum of education required so they can evaluate their own hotel program, look at their traveler booking patterns, understand how many are booking outside the system and take a hard look at their supplier negations. When they see the savings and benefits they can realize with RoomIt, on average we can save them 12%, they realize that's a big return to their bottom line.

**Q:** How would you describe an ideal prospect for your business?

**A:** On the SMB front an ideal customer is a $200M manufacturing company who has 25 sales reps on the road at any given time. These sales reps fly from one secondary market to another and need 5 different hotel stays during that trip. The sweet spot industries for these prospects is in sales and service organizations. We are also looking beyond the US and see similar opportunities in France, Spain, Germany and the UK. We are getting ready to support those markets.

**Q:** What does a prospect need to know about your offering before they will convert into a customer?

**A:** We need to be committed to covering all the bases: knowledge of our offering, making sure our sales team is prepared and ready to sell, effective pricing strategies and proof points to allow us to sell with credibility.

**Q:** What does RoomIt need to do to win in 2019 and beyond?

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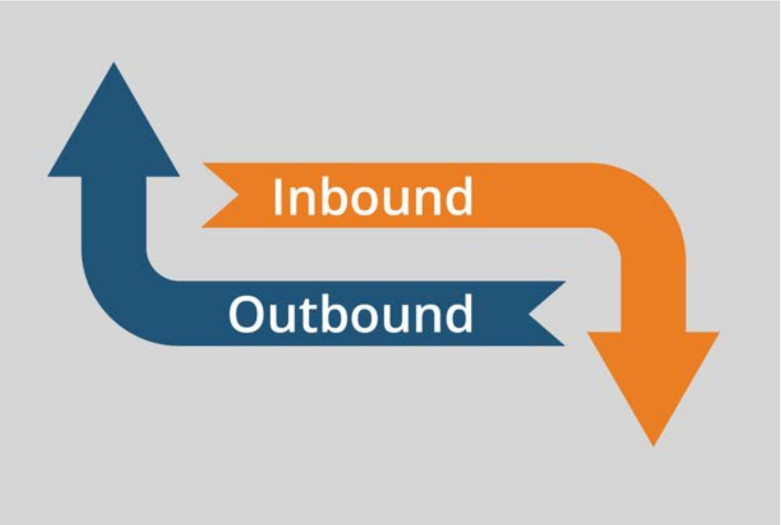
# Driving Revenue through Inbound AND Outbound Techniques

Companies have problems. All sorts, shapes, and sizes. Sales solves a lot of those problems. Because of that, companies attempt to grow revenue in all sorts of ways. Direct sales, channel partners, networking, chat bots, inbound marketing, manufacturer's reps, webinars, events...the list goes on and on. The approach will vary based on industry, offering, and client needs. Planning the right tactics and strategy are critical to gaining traction against competitors and breaking people from the status quo.




Over the last decade, there has been a huge push toward "inbound marketing". I've seen several of my clients grow multi-million dollars on inbound alone. This would include website content, SEO, blog content, video content, social media, eBooks, webinars, surveys, case studies and analyst reports.

I've worked with others that have grown the old-fashioned way - outbound sales. Cold emailing, cold calling, door knocking, networking, direct mail, events, display ads, TV and radio ads, and press releases.

Either way you go about it, companies that I see getting stuck (growth-wise) are the ones that have grown by only choosing one or the other. Modern sales and marketing approaches must employ both inbound and outbound techniques to accelerate and maximize growth. So how do the two live in unison? What is the best way for them to complement one another? This topic has been on my mind a lot lately, as it has for many of my clients. ***Without a thoughtful inbound approach, your outbound efforts are less powerful. Without smart outbound methods, your inbound efforts may never get seen by your dream clients.*** You will see dramatic growth at the top of your pipeline when you have both strategies working in lockstep.

## Marketing & Sales - Woven together

Gartner has done some eye-opening research on the B2B buying journey.  It lays out some agonizing truths about the reality of that journey.  Much like the path to success, it is not linear or always moving in the right direction.  They define six different buying jobs:

- Problem Identification
- Solution Exploration
- Requirements Building
- Supplier Selection
- Validation
- Consensus Creation

The confusing thing is that these can all be going on simultaneously.  Depending on the job being performed (and the person doing it), a salesperson needs to know the right play.  When deals are "mid-pipeline" for a salesperson, the prospect is making decisions on their own behind closed doors.  Marketing teams play a critical role in keeping sales engaged even after a prospect is in the pipeline.  There is no longer a "hand-off" from marketing to sales.  The two must learn to zig 'zag together as the organization navigates the decision.  The higher the price tag and more complex the solution, the twists and turns are sharper and have higher stakes.


For most all sales organizations, the "sales process" is linear and doesn't plan for all these behind-the-scenes twists and turns.  Sales leaders see deals linger in certain stages for weeks or months with no movement.  Reps get caught in the 'hurry up and wait' game as things play out behind the prospects doors and deals lose momentum.  Time kills deals.

One way to address this modern buying journey is to understand where and how you can add value along the way.  Building a grid like this below will help lay out what you need from both an inbound and outbound standpoint.  Think about the questions asked and comments made by prospects as they are navigating their decision.  The answers will lead your decisions as to what resources and tactics to deploy - keeping in mind that the goal is to act as a guide for them during their journey.

This blended approach of inbound & outbound techniques can accelerate sales when executed properly.  With the onslaught of marketing and sales technologies and the speed at which the market moves, your approach must stay nimble and responsive.   Look at sales and marketing as one combined Revenue Department and combine their goals. The singular focus will lead to better execution and more sales.  And for your company...less problems!

| | Problem Identification | Solution Exploration | Requirements Building | Supplier Selection | Validation | Consensus Creation |
|---|---|---|---|---|---|---|
| Questions & Comments being made | | | | | | |
| Marketing/Inbound Plays | | | | | | |
| Sales/Outbound Plays | | | | | | |
| Content/Assets Needed | | | | | | |
| NextStepsbeingProposed | | | | | | |

Tony Lenhart
SALES DRUMMER

# Achieving a Trusted Advisor Relationship with a Client

This is the ultimate level of establishing a relationship with a client. How do you get there?

My best advice is to be yourself, work hard, be sincere, and be aligned with their vision. Help them to achieve the mission and the vision- and most importantly- be part of achieving the outcome!

I recently contacted a prior client in the UK. I found myself planning a trip there, due a new client engagement. I reached out to my prior client, which we will call NalCom, via email. I had not had contact with NalCom, since leaving my prior company two years earlier. I reached out to two of my main contacts, via email to see if they were going to be around as I would welcome gathering on one of my free evenings. Within minutes I heard back with a "yes- let's do dinner". We planned it 30 days in advance. I had little contact with this former client over the past two years, so to be welcomed with open arms made me smile – I grew excited to see them both again.

Upon reaching the UK, I got a text from one of them, wondering my plans were for the Sunday of my arrival. I ended up spending the Sunday tooling around London. We hit Tate Museum, St. Paul Cathedral, and Shakespeare's Globe theatre. After the day was over, I sat in retrospect, happy that had I re-established contact with this former client, but realizing the business relationship that we once had, was one built on trust and mutual respect.

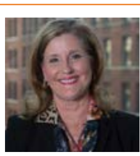
My past two years had been so busy changing companies and changing roles that I had not had time to look back and realize all that I had accomplished with this client. I truly had achieved the Trusted Advisor relationship. A relationship that so many of us desire to have with our clients in the sales profession. For four years, I sat inside the client's doors as a sales coach and trainer. I certified their sales leaders as sales coaches. The client's headquarters were based in India


– an 11+ hour time difference. Often, I worked early morning hours or late-night hours just to be accessible for their workday. After 4.5 years, I became one of them.

The Trusted Advisor status was a result of being in the trenches with NalCom, helping to build their sales enablement infrastructure, and coaching leaders to sales success. More importantly, I now realize that by having been aligned with the Chief Sales Officer and helping him to accomplish his vision and mission, I was earning the Trusted Advisor badge. I was part of *building* his organization.

Now, years later, I can see the evidence of his tidal wave of success at NalCom. I am humbled to have been part of it. I was fortunate to be part of his vision and his ultimate trajectory of success.

My lesson learned and passed on to you as a reader – in order to achieve the Trusted Advisor status, be part of building the vision, work hard, be yourself, and become part of your client's organization and culture! You will reap the rewards on many levels. I now have a great friendship across the Atlantic!



Jennifer Hogberg

VP, SALES ADVISORY

INTERVIEW

## Petro Tsarehradsky, VP Sales and Marketing, WIN Technology

# A conversation on Accelerating Revenue Growth

**Q:** How do you think about revenue growth at WIN?

**A:** We have shifted our thinking from focusing on a revenue target to thinking about how can we increase our share of market. This is more of a journey than a destination. Also, a very healthy cash flow is important. We want to replenish our pipeline by keeping our customers happy and buying from us instead of our competitors.

**Q:** What are your most important sales and marketing levers for accelerating revenue growth?

**A:** On the Sales front it means being sensitive and aligned with our customer's buying cycle. I believe there are set of indicators for each of the buying stages where we have to be aligned, this where the work is to be done.

On the Marketing front it means how do we generate awareness, does the market know we exist, to setting quality meetings that lead to an effective two-way dialogue. Also, being focused on conversions allows us to manage these levers and keeps us focused on fundamentals which allows us to better plan our investments.

**Q:** What key insight have you learned and applied to improve your sales and marketing process?

**A:** On key insight is that there are no magic bullets or people. The biggest insight is you need the right skills applied to the right stage in the buying cycle. It's about process. If you want to open a door it's not the same skill as gathering requirements, which is not the same skill set as closing the business or managing the account.

Customers and prospects are done with fake news and glossy marketing – they want the facts to help them with their thinking. It comes down to how you design your content and messaging. How do you create claims and back them with evidence? Many businesses are making promises and claims that they can't keep and the market is conditioned to want proof and the proof is in the data.

**Q:** How would you describe an ideal prospect for your business?

**A:** In our case it is someone who has a problem. They need to understand that resolving their problem means growth for their business and believing that they want to solve their problem now.

We focus on delivering quality of service and quality of product. We are in the technology business delivering fiber in the ground supporting applications that are dependent on fantastic bandwidth so that streaming services do not burp. We deliver data redundancy that is so strong a hospital will not break a bond it has developed with their patients. We work well with companies that want to grow profitably, therefore we need to have a strong exchange of value with a prospect.

**Q:** What does a prospect need to know about your brand before they will convert into a customer?

**A:** We are focused on three virtues that we want to communicate to our prospects – flexibility, responsiveness and reputation. Reputation is the most important data point a prospect can gain from their online evaluation of our services is confirmation from their peers. One of the metrics that matters most to us is our customer satisfaction score. Our average Net Promoter Score score is 9.2. It is the strongest data point we have. You can no longer hide from customer recommendations or reviews.

**Q:** How important is creating good content to your business?

**A:** Flat out 100% critical – it is one of the largest marketing investments we will make this year. The ability to have prospects look at 5 pages on you web site instead of 1 is a game changer. Research indicates that our collective attention span has recently decreased from 12 seconds to 8 when researching a topic or potential partner. The truth is the attention span for poor content has diminished the most. When you find great content you will spend more time with it – whether it's a Netflix series or your own content. We have a ton of attention for what we want to absorb.

**Q:** What does your sales enablement roadmap look like in 2019 and beyond?

**A:** At a high level we are focusing on sales acceleration instead of sales management. For starters we are investing in a sales specific content strategy. Every sales person needs something new and meaningful to say to a prospect.

We are also simplifying the management of our sales team. Instead of 5-8 stages for a sales process we are reducing it to 4 steps. We don't need to bog down sales people.

What if you had a calculator that provided real time info to determine whether a prospect is in or out of the pipeline? That would give sales people more time to make calls as opposed to figuring out probability of closing.


# Driving towards the truth – it begins with the metrics.

Our quarterly magazine focuses on the Truth in Sales and Marketing. As marketing and sales leaders, we tend to be overly optimistic and feel "We will make it happen." However, we have experienced that often we shift to "We have to make it happen because we have overpromised and over committed to hitting our numbers".

It is not that we intentionally lie, but we believe in our team's ability to achieve their goals. In addition, we are asked to push the limits since we are leaders in our organizations. In this article, we will focus on the hard reality of being honest with ourselves and how to track factually instead of emotionally. It's very simple, you can get to the TRUTH, without the feeling of over extending yourself.

Staying aligned with your board members, investors and executive team is the key to your success as sales and marketing leaders. I will never forget asking a CRO during one of my consulting engagements what were the top 3 KPI's he was responsible for? He went on for 90 minutes and still could not describe the top 3. I stopped him and said the first thing we need to do is have alignment on your top 3 KPI's so we can report quarterly on the truth and what we are doing to hit those know, it seems simple, however, he wasn't clear and therefore misaligned.

**How to track truthfully to your 3 KPI's?**

We spent the next 60 days putting in-place the right tools to track his 3 top KPI's. We needed to make sure our reporting package aligned with tracking the ARR, CAC and the on-going tracking to insure he hit $52 million.

To make this happen we collaborated with the marketing team, sales team, CFO and others within the organization to make sure we had alignment of the right data, tools and resources to be able to report back truthfully on how we were tracking to those KPI's. It wasn't that he was lying; however, when you have bad data and misalignment of KPI's it can look like you are dodging questions when put on the spot. Then when you miss numbers it looks like you had misrepresented your data. His board meetings became much more focused and accurate. More importantly, we could use the metrics to manage his team to hit the KPI's!

**Tools and Resources utilized**

We used the organization's ERP, CRM and Marketing applications to derive data that was one source of the truth. We created dashboards in the ERP system and optimized the CRM system to display and track all 3 KPI's – month-to-month and YTD. Yes, it was painful to set-up; however, it was much more painful to not be right. We could make changes rapidly and when we noticed trends that we needed to fix, we could make adjustments quickly. In addition, the cost of sales went down and revenue growth increased.

More Time – As you can imagine, the CRO increased his attention on the 3 main KPI's that were always visible to all. He used to spend time on too many things outside of his scope that we actually termed C-Priorities and those were only worked on if the KPIs were being achieved. Simply put, before defining the top KPI's he would waste time on many tasks and activities that really at times did not matter in the big picture. He started to have a bigger impact and more importantly had the accurate data to track/present.

Invite prospects to a webinar that promises business building strategies.

## Now what?

You can implement these programs to bring suspects into your funnel, qualify them to become prospects and implement recurring campaigns to convert your prospects into customers.

This can all begin with customer data you already have at your fingertips. Let me know if we can help you put these strategies into action.

**Summary**

In this magazine you will read many articles from interviews we conducted, SEG's President on some hard hitting facts on sticking to the truth. If you have alignment with your board, investors and executive and track all your KPI's factually instead of emotionally the truth is much easier to present. More importantly, this will allow you to not have any surprises quarter-to-quarter.

Brian O'Neil
CEO AND FOUNDER

# Monologues Vs. Dialogues: Four Ways that High-Growth Companies Connect with Their Customers

I'd like to introduce you to the first great marketing philosopher. Long before Coke was teaching the world to sing, and, about the same time that the guy selling the round wheel cornered the market on transportation, a guy named Zeno of Citium was positing on a very important marketing attribute - listening.

Said Zeno, quite presciently: "We have two ears and one mouth, so we should listen more than we say."

Forget about the fact that these words were probably etched on some sort of stony substrate – which should have lent credence to the gravity of their meaning. Today, many businesses continue to ignore Zeno's sage advice – deciding that it's more important to tell their own story, without understanding the impact on the intended consumer.

As an interim Chief Marketing Officer, I often start my engagements by observing this sort of "mouth-first"

behavior. After talking with employees, customers and even competitors, invariably I learn of a significant disconnect when it comes to the kind of "active listening" that comes from involving the "ears" in the discussion. And, that this lack of frequent market research translates to an ongoing struggle to achieve sustained growth.

By lacking a systematic way to capture feedback from these key audiences, it's a challenge for these companies to evolve.

What's the best way to get meaningful insights from your customers? Ask them for their opinion. They will often be more forthcoming when these questions come from a third party such as myself, but once you get them started, this process should migrate to an internal resource and be conducted frequently – as often as once a quarter.

## Dialogue vs. Monologue

The goal is to have a dialogue with your customer – not just a monologue. A monologue comes from nothing but outbound communications such as press releases, social media posts, email campaigns, etc. A dialogue comes from taking the time to really listen to your audiences and find out how they feel about your relationship.

A recent study by The Hinge Research Institute proves this point. They studied high-growth versus no-growth companies and found that more than one-third of high-growth firms conduct market research on a frequent basis (at least quarterly). None of the no-growth firms conducted frequent growth.

So, how can we construct this dialogue in a way that is productive, sustainable and fosters growth? Here are four ways that high-growth companies have cracked the code:

## Direct Questions:

Sophisticated tools do exist to incubate consumer dialogue, but I find that the best way is to get on the

phone and start talking. I had a recent engagement with a B2B telecommunications company, and we decided on a simple mission as our starting point — a series of conversations with their customer base. Rather than the types of dialogue that sales reps typically engage in to make the sale, we asked more pointed questions: "What helped you decide to use our company?" "What are you looking for from us to continue the relationship?" We found the customers were more forthcoming and candid with us than they would be with a third-party research firm, because of the inherent trust built in the relationship.

## Interactive Content:

For those consumers that are truly happy, we would agree that they represent our best, and most credible, promoters. Consider asking them to participate in case studies and video testimonials that add a third dimension to their satisfaction with your company and its products and services. At one engagement, we turned a series of such conversations into a dynamic YouTube channel that the sales team now uses as part of its dialogue with new prospects.

Additionally, the types of feedback you gain during these conversations will form a series of insights that can help your company shape its overall content marketing strategy. Once that happens, your content will no longer

seem preachy, but it will take on an approachable tone – almost written by the customer, for the customer.

## Industry Insights:

Bear in mind that one of the goals of this two-way dialogue that you're undertaking is to identify key differentiators in the marketplace. You want to understand: How can you stand out in your customers' and prospects' mind when the moment of truth arrives? Who will I partner with? It's more likely to be a company that talks *with* me instead of *at* me.

## Repeat, Repeat, Repeat:

This is not a one-shot deal. At a minimum, you'll want to develop dialoguing tools that are touching your consumer on a quarterly basis. This will help your customers to understand and appreciate the depths of your company's efforts at continual improvement. You'll find, as a result, that they'll often look forward to these opportunities to reporting on the progress of your relationship, or on any slippage of service, from their perspective that could be affecting your relationship.

The bottom line? Always remember the sage advice of Zeno, and lead with your ears. Start — and keep — a conversation going with your customers and prospects to make sure you stay — or move into the high-growth category.

Geoff Kehoe
CHIEF MARKETING OFFICER

# Are you Watering your CRM Garden for the Best Yield?

We all know that you if tend to a garden by preparing the soil, are diligent in watering, pull out weeds, and give the plants the necessary nutrients, they will flourish. This is also be true in the land of CRM (Customer Relationship Management) tools. Without properly preparing the data, defining processes, and training the users how to update the system, the CRM may reach its demise rather quickly.

## Preparing the Soil

The proper documentation of current processes, in addition to receiving input from a variety of users, is imperative to ensure that you capture all the correct steps is imperative to setting a good CRM foundation. This includes items that can be improved in the process. By capturing data that is crucial to your company's client portfolio, you to optimize the data that is entered. Be selective about the details you're capturing and don't capture data just to capture it. Question if the details you are currently keeping track of still make sense to retain.

Fields in a CRM system act as filters to create reports and dashboards allowing for a deeper level of analysis and better business decisions. It is not a best practice to use text fields to capture any KPI's (Key Performance Indicator), as they restrict roll up summaries and the ability to quickly filter items for further analysis. It's important to define the field name, what type of field it should be (currency, single vs. multi picklist or a lookup relationship) and add help text so that users know exactly what they are expected to enter. Capture definitions for each field and create a user guide while going through this process so your CRM will flourish with information.

## Watering

A CRM is not a one-and-done tool. It's an ecosystem that needs to be well maintained and attended to. If it is within your budget, it is ideal to have an appointed CRM administrator who will communicate, train, prioritize, and troubleshoot system related issues. You can also hire a consultant, such as the work that Sales Empowerment Group provides to act as an Interim CRM administrator who will upkeep all the moving parts of the system. Depending on the CRM system you choose, there will be updates and changes to the interface as well as growth and changes to your business that need to be adapted in the CRM.

Just as important as which fields you add, updating the fields is fundamental. A collaborative team that understands and appreciates the importance of keeping current data will put you light years ahead. This comes with well-defined communication of expectations, and a buy in at all levels of the organization – supporting the implementation and work within the system. Any conversation that happens outside of the system, devalues it. Build a strong cadence of data validity. Furthermore, make sure you provide updates, listen to feedback, and make all users comfortable using the system. When first implementing, it's a best practice to have a set bi-weekly meeting following the deployment so users can ask questions, walk through live scenarios, and introduce best practices and new functionality.

## Pulling out Weeds

As we all know, garbage in – garbage out. Data integrity can be a huge pitfall within a system. Stale data, not entering data in a timely manner, and not instilling accountability can leave a bad taste in users' mouths.

Stale data can leave users loathe to spend time updating records. There are a plethora of tools available that can be integrated with CRM systems to update details in batches, or with the click of a button, to reduce additional data entry. Keeping up to date records so that any user can log in and trust that the data is accurate goes hand in hand with user adoption and the overall success of a system.

> Data integrity can be a huge pitfall within a system.

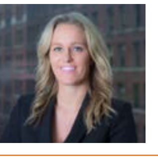
Calendar blocking is a great technique to hold time to ensure that data is entered in a timely manner. Have users block their calendars at the end of the day or after an event occurred to ensure they are updating the details in a timely fashion. Most CRM systems have mobile applications that allows users to enter details on the go and not spend a wealth of their time doing data entry. It's always best to block time out to make sure the notes and items are entered when they are crisp in your head.

Making users accountable for their input is one thing that can make a wealth of a difference. Identifying super users, giving incentives to update data, and using reports on weekly or bi-weekly calls to discuss the data entered are some best practices. This can be a cultural shift, but a lot of time, money and resources are going into this system, so making users accountable for their work is crucial.

## Nutrients

As mentioned before, a CRM is an ecosystem and needs to be continually nurtured. Companies must establish change processes. Ensuring that the core implementation team can prioritize requests, process improvements, and roll out updates to users for system optimization is key. This is accomplished by continuing training, selecting integrations that can improve process flows, while being collaborative on ways to improve the system will yield the most growth. Maintenance is an on-going process and doesn't stop once the system is deployed. Limiting knee jerk additions to the system and ensuring they help rather than hinder is always a best practice.

CRMs can be daunting but by breaking them down into small manageable pieces and taking the time to prepare the soil, water, pull out weeds, and nurture the ecosystem, you can make all the difference on how much you yield from your efforts. Don't be hasty in implementation. Setting a strong and solid foundation instead of backing yourself into a corner with over optimization is truly important. Remember, "the day you plant the seed is not the day you eat the fruit." – Fabienne Fredrickson



**Krystal Kucharski**
DIRECTOR, SALES ENABLEMENT

# Four Reasons LinkedIn is More Critical than Ever

Since Microsoft bought LInkedin back in 2016 for $26.2B, the platform has undergone countless changes. With all those changes, LinkedIn is still the best social media channel for the B2B sales professional. If you are not using it to your benefit, here are four reasons to get on it now.

1 **The Sales Person is the Value Driver -** In a highly competitive and increasingly commoditized world, how you, as a sales person, engage with a prospect helps you stand out from the pack. Your LinkedIn page is a conduit for that engagement and a platform for your (personal) brand. It may well be the first place your prospect sees what you're about, and you can control the entire message. What you share and write on your page is what makes you unique. There is a ton of value in that. Put extra time into your summary section and tell the story that you want to be heard.

2 **Stay in Rhythm -** you can follow anyone and anything on LinkedIn. You control your news-feed. You can follow people, companies, hashtags, groups, peers, thought leaders, competitors, and clients. You get a taste of what all those people and brands are talking about, worrying about, talking to, uncovering, launching, and growing. Through this lens, you too now have your finger

on the pulse of what is happening in the market. Which in turn helps you drive more value (see #1).

3 **Engage the Right People** - it's easy to spend too much time with the 70% of people that will never buy from you or your company. If you have spent time on your Ideal Client Profile (ICP), you know what your best prospects look like and what keeps them up at night. Equipped with the right knowledge (and the paid version on LinkedIn, Sales Navigator), you can identify these people with pinpoint accuracy. This search capability will benefit some industries better than others. However, once identified, you can set-up LinkedIn to automatically update you when new people match your saved search criteria. How you then choose to engage with them is a topic for a whole new article.

4 **A Modern Sales Approach -** lastly, LinkedIn empowers three excellent ways of selling.

1. **Triggers** - any event that happens to one of your prospects could be a trigger for them needing your company. A move, a hire, an opening, a product launch, a market shift, a law change. You'll have insight by following your best prospects (see #2) and figuring out how you and your company could help them with any of those triggers, be they positive or negative.

2. **Insights** - what industry verticals do you sell to? If you sell into the retail industry, you better know all the latest trends that are impacting the retail world. LinkedIn is a place to pick up and learn on these insights, then to produce thought leadership on the impacts, and finally to share on LinkedIn to draw in the right crowd.

3. **Referrals** - the backbone of good selling. As I've heard it said, "Your network determines your net worth." Everyone now has their rolodex, their little black book, on LinkedIn. You can quickly determine if you know someone that can help open a door at that dream client. When curating your network of connections, there will always be a debate between quantity and quality. You increase your reach exponentially when you lean toward quantity. By no means am I saying connect with everyone that sends you an invite, but don't always dismiss without investigating. Conversely, you need to reach out and engage with the people that make the most sense - be they networking partners or prospects that may need your help.

Remember - you can do all of this from the palm of your hand through the LinkedIn app. Use your LinkedIn profile to your advantage. It's not the end-all-be-all of sales tools, but it's a modern professional's path to engaging in a whole new way.

Tony Lenhart

SALES DRUMMER


# Is Your Culture Hindering the Success of your CRM?

As if CRM (Customer Relationship Management) tools aren't already overwhelming, the added layer of how your company's culture can impact it, can be a lot to swallow. I mean, what is culture anyway and how can it possibly effect the success of a CRM?

Inc.com defines corporate culture as "the shared values, attitudes, standards, and beliefs that characterize members of an organization and define its nature." It is rooted in the way the company conducts business. In a book written by Marvin Bower titled The *Will to Manage*, he simply defines corporate culture as "the way we do things around here."

CRMs are ecosystems that need to be nurtured and become a part of your team's daily life. They aren't a one and done product. Simply purchasing seats and offering a one-time training session does not guarantee success. The core base of a CRM is to allow for your organization to be more collaborative and have a holistic view of current and prospective customers. Information is the most valuable outcome you can attain to begin to analyze and assess how to improve your customer interactions. Why spend so much time, money, effort, and resources to

> "the way we do things aroundhere"

just go back to "the way we always do things around here." How individuals engage with and adopt the system will be fundamental in its overall success. It is imperative to prepare your organization for a shift in culture to positively influence the success with your CRM.


## 1. Share a common vision.

It's incredibility important that everyone is on the same page with expectations for how they use and update the system. Clear definitions on why users' input is important, how it will be used, and how they will be held accountable should not be taken lightly. Without defining these items, everyone will start guessing. Communication is key. Make sure you document these items, so it does not come as a surprise to your users.

## 2. If it's not in the system, it's not real.

Anytime you conduct a conversation outside of the CRM, you devalue the system. Those that spent time entering data in the system then become rather annoyed at entering data in the system, only to have the conversation regurgitated. Make it a habit to set up dashboards and reports and review them with your team on your weekly or bi-weekly basis. Spend some time building efficient reports that are well understood and cover all the information that is expected to be updated in the system. Engage with your CRM administrator for help creating these reports if you're not comfortable creating them yourself. If the data is not in the system, then don't talk about it. Stand your ground and advise the user that the discussion will be had once the data has been updated in the CRM. Don't give in!

## 3. Measure CRM outcomes and make users accountable.

At Sales Empowerment Group everything our Business Development Representatives do is noted in the system. We use tasks and events to capture every transaction that is done with the client, so it is crystal

clear what happened and when. Everything is time stamped in the system and defuses any excuse for not keeping records up to date. Creating "scorecards" by correlating point values to tasks and events can be very powerful in adjusting one's behavior. Prepare a week to week or monthly report that is reviewed to identify the user's activities for the given time period. Recognize users that are excelling in this area and make note, so the team knows who is shining and that the effort is recognized.

### 4. Collaboration is Key.

Set a monthly meeting that is required to discuss CRM knowledge sharing and best practices. You can decide to appoint a new user every month to share a specific story, or instance on how they best utilized the system, or open it up to users to share any tips/tricks they have uncovered in the last month. CRM providers are always rolling out new functions and features, so sharing those once they have been released is a way to keep the team sharp and efficient.

### 5. Hold everyone to the same standard.

We're all busy and have a million things to update and manage but when you allow users to slack off from doing their CRM inputs you set an expectation that this behavior is in some way acceptable.

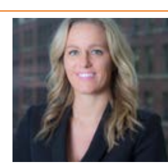
### 6. Training. Training. Training.

This is possibly the most consistent topic that I speak about when implementing a CRM system. Holding one quick training session and then expecting everyone to "get it" will cause you some road bumps. Understand that everyone learns differently. Also remember that key word – ecosystem. CRMs evolve with your business so additional training will be necessary.

With any system, a dedicated or at least partially dedicated CRM administrator is key. Accountability is crucial to overall success, and an administrator that can sift through the requests, provide best practices, and offer continued training is going to be your bread and butter. Hire someone to handle the administrative side. Whether it be a seasoned consultant or someone on your team to manage feedback and act as a trusted advisor.

> **Accountability is crucial to overall success**

Every industry, every organization, and every CRM are going to be different, so this list is not exhaustive of all the items that effect a culture and the CRM. It's important to understand however, that laying a solid foundation and creating a culture that complements the evolution of your CRM will have an immensely positive impact on your customer satisfaction.

KRYSTAL KUCHARSKI

DIRECTOR, SALES ENABLEMENT

# Why is the Shelf Life of a VP of Sales Somewhere Between Yogurt and Cottage Cheese?

After 30 years of leading sales teams, the question I'm asked most often is "how have you survived as a VP of Sales over 2 years in each of the companies you have led?" This question undoubtably comes up due to the fact the industry average is now around 19 months and shrinking!

## The VP Sales' Average Tenure Has Shrunk 7 Months — Here's Why

In looking back, I realized that there seem to be two types of sales leaders in the software world I lived in. The first and most prominent type is "the Face" of the organization. You know the type – big personality, lots of motivational speeches and quotes, always at their best as they work the audience with ease, hard closer but typically less process-oriented or analytical when making decisions. That was not me. The approach that worked for me was to become a "Facilitator" with a bent toward using analytics to make decisions. My type – cultural warrior, strategic thinker, process oriented (not only with sales cycles but also marketing) brings in subject matter experts to close deals.

I have found that Facilitators inherently bring the connective tissue to the company by believing in and acting in the best interest of the company. It starts from the top down and is a key to providing inspirational coaching, mentoring and overall management of the cross functional teams. When your direct reports truly feel you're looking out for them and others that support them (e.g. Marketing, Product Support & Management, Finance etc.) the best people will stand by you even though the tough times. As Simon Sinek would say, *"If you hire people just because they can do a job, they'll work for your money. But if you hire people who believe what you believe, they'll work for you with blood and sweat and tears."*

## This may not be what you expect but here are my 5 keys to survival:

1. Become a cross functional collaborator within your first 100 days in your role. Go out of your way to gain a comprehensive understanding of what drives other departments. Learn how to digest feedback coming from those other areas and your sales team so you can translate this valuable information into an effective sales and go-to-market strategy.

2. Hire talent that has the skill set to accomplish urgent and important activities that you are simply not good at. Since my greatest weakness in every company I have led is that I didn't

possess domain expertise, I surrounded myself with subject matter experts who translate the value of our vision to talk about solutions and address specific industry and related business issues our buyers could not solve on their own.

3. Build you sales processes and reporting based on the metrics your company is focused on achieving. Within your sales process, ensure that you identify clear milestones that one must meet before moving the buyer to the next stage of the sales cycle. My father was a carpenter, and I have applied his favorite saying "cut once, measure twice" to my regular CRM dashboards. We interpret key metrics in several different ways to help determine our next steps and strategies. Use the data to help you determine areas of weakness in the people or the business so you can quickly recalibrate your coaching, training or business development strategies.

4. Be an open book leader. While you can't share every financial detail with all employees, you must establish a regular cadence of communication, so everyone knows how the company is doing against their most important initiatives. During every communication ensure that you and others highlight the positives and challenges every department faces.

5. Commit to productive one-on-one's. As a you can tell, I'm a huge fan of open communication but making sure you spend personal time with your direct reports on a regular and scheduled basis is critical. Put these on the calendar with a specific agenda, so no one can miss it unless it impacts a client or prospect situation. Make sure the sessions cover both business and personal agendas of the individual.

While the most obvious survival skill is making your numbers, the only way I have found to do this consistently is to have all the above in place. This approach allows the business to scale because it is built on a cultural foundation of trust. That trust is earned by everyone knowing their sales leader is not just in it for a sale.


Kevin Potrzeba

PRESIDENT

# Why We Love Generation Z

You might hear all kinds of horror stories about the Millennials - how they are selfish, lazy and the future looks bleak. I tend to disagree with most of the negative reports about the group but realize there are examples of greatness and the lack thereof in all generations. I have a few childhood cohorts that are still trying to find their place in the world well into their 50's. To give you hope that all is not lost, the next generation looks outstanding. Generation Z – which includes a broad range of ages from 7 – 22 in 2019 – could be our Lone Rangers. Super smart, super competitive and tech savvy beyond belief. I have had the pleasure to work with both groups for years, but Gen Z keeps me motivated and I look forward to going to work every day with them.

## Here's just a short list of why we love Generation Z:

**#1 Very Competitive** – Gen Z likes to win. It might come across a little passive aggressive; but deep down they are very competitive. At SEG we try to have daily and weekly contests around activity. It doesn't really matter what the prize may be. They always try and win, whether it's a couple hundred bucks or a $5 Starbucks card.

**#2 WIFI** – To say "the world will stop if the WIFI goes down" used to be a vast exaggeration. Now, if LinkedIn, Salesforce, or Outlook perform an unscheduled upgrade or patch, or general network services go down for more than 5 minutes, we immediately are thrown back into prehistoric times. We wander around confused and concerned that this is the end of times. I have watched first-hand a wonderfully productive morning with motived teams making hundreds of calls stop in its tracks. With all their tools disabled, if it wasn't for the lights and running water, we might have just shut down for the day. WIFI and technology is the Gen Z lifeline for all communication – Personal and Business. When the network goes down they go down.

**#3 Financially Savvy** – I will use a broad stroke for this one. The Gen Z's that I work with and the ones that still live with me are pretty good with their money. Some still live at home while they save to buy their own place (which I encourage) while some meal prep on the weekends and research stocks on their lunch breaks. Working in downtown Chicago can be expensive and living downtown seems impossible to afford. However, Gen Z thrives on the downtown lifestyle and figures out a way to pull it off. Most, if not all, have started saving for condos, houses, investment property, and retirement. Can they learn more? Of course, we all can. Will they drag down the global economy with their financial mistakes – not likely.

**#4 Amazon Prime** – Gen Z will still make the effort to go to malls and meet friends out for shopping etc. but Amazon Prime is their go-to for everything. Clothes, gadgets, general stuff they probably don't need. Order it on your phone and have it delivered to your house or office cube by the end of the day. Since I'm ordering something on Amazon Prime while I'm writing this article, I really don't see much of a problem with this one.

**#5 Instant Eats** – Now this is a new one for me. Not only does Gen Z fully understand and embrace technology, they use it to survive. They have figured out that with so many food delivery apps if you share coupons with 100 other Gen Z's you can earn rewards and eat practically free for weeks at a time. This again is brilliant, and I salute this endeavor.

**#6 Yelp / Social Influence** – If you or anyone you know plans on opening a restaurant, retail or club, plan on catering to this generation. These folks will blast away to thousands of friends, family and anyone else who will listen if they get bad service. And rightfully so. The bad news is that their thoughts & opinions will make an impact on any company they target. Now the good news is they will also take the time to comment on great service. I can't count the times I've taken one of our BDR's to lunch and before they start to eat, thay snap a picture for Instagram, Twitter or Yelp. Lots of power and influence that can travel to millions of people over night with one well placed post.

**#7 You Tube / Education** – This one might surprise some people, but just about everything - from how to tie your shoes to how to do a heart transplant - is on YouTube. Gen Z has had instant access to more information than all previous generations combined. (Don't try and check that stat – I just made it up, but it sounds about right.) Not only can they complete grad level courses for free online, but they can take 10 minutes, watch a few YouTube videos, and probably learn how to fly a plane.

Keeping up with the trends and technology that companies need in order to stay competitive and relevant will always be a challenge. The workforce that we target, train and develop for our clients will continue to come from Generation Z. I think we are fortunate to have such a sharp group of young goal oriented, financially motived and competitive individuals to work with every day. If you have worked with us before you understand. If you have not and are considering our Business Development program, just come by and let me introduce you to a few up and coming Gen Z's that would be thrilled to become part of your organization.

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ACCELERATING GROWTH

Tracy Wood
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