LEADERSHIP GUIDE

Transforming Your Sales Teams for Success

Elevating your People, Processes and Technology

Outreach

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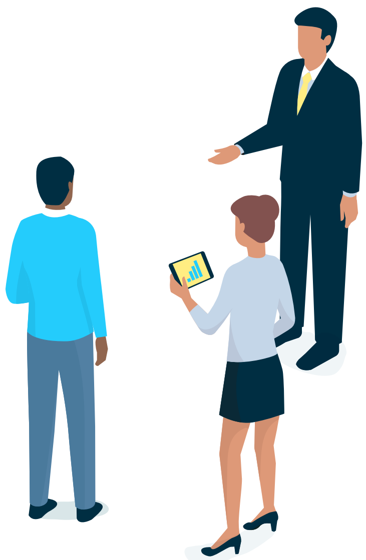
Executive Summary

Technology is king in today's business to business (B2B) world. For sales organizations, finding the right technology to support your teams may mean the difference between generating pipeline and going out of business.

But all too often, sales organizations purchase new technologies and expect their sales transformation to be complete. This pitfall is as common as it is expensive. As Harvard Business Review notes, "For all the dollars spent by American companies on R&D, there often remains a persistent but troubling gap between the inherent value of technology… and their ability to put it to work effectively."[1]

[1] *Harvard Business Review, "Implementing New Technology."*



In 2018, more than $1.3 trillion was spent on digital transformation initiatives last year, yet more than **70% of organizations didn't reach their goals,** resulting in $900 billion dollars wasted.

-Harvard Business Review

"Digital Transformation is not about Technology."

While there is increasing agreement that part of an organization's sales transformation is adopting cutting-edge technologies like sales engagement platforms (SEP), technology alone won't create success. To successfully transform your sales organization, organizations need to think about their organization through three lenses: people, processes, and technology. Companies that uplevel their technology but neglect to equally manage the people and processes affected by the new technology significantly risk falling into the 78%—the percentage of companies that see average-to-below-average return on investment.[2]

This ebook is for sales organizations that have transformed or plan to transform their sales organization through new technology and how to prepare their people and processes to adopt it. We address how adding new technologies catalyzes changes to a sales organization and how they can minimize these growing pains by:

- **Aligning business goals to the technology**
- **Utilizing change management techniques**
- **Enabling sales reps to use the technology**
- **Creating processes and workflows that wrap around the technology**

[2] *Accenture, "Rethink, Reinvent, Realize: How to Successfully Scale Digital Innovation to Drive Growth," 2019.*

"There are several inhibiting factors when it comes to a successful digital transformation in sales practices. **First, the business has to be clear about their overall strategy.** What is it you expect from this transformation process, and why are you putting in the resources to make it happen? If there's no clear alignment between the mission and vision of the company, then the objective or purpose of the sales digital transformation will not be apparent either."

-ForceManager

We start by defining digital transformation and its effect on the sales industry. We then discuss how technologies are often the first step toward transformation but not the last, and how change management can support the people using the new technologies, and the processes needed to support the transformation.

We close by sharing our own customers transformations and refinements to maximize their success as they continue to scale their sales organizations.

Digital Transformation and B2B Sales

Digital transformation is a process that identifies how technology has impacted and changed key industries. These changes are far-reaching and include the acceleration of technology, as well as new roles and processes created to support the new technologies. As Medium simply states, “Technology is a force that is changing the market, transforming industries, and destroying old business models.”

“Sales digital transformation is no longer an option — it’s a necessity. Modern B2B buyers want to buy from modern sellers; they want to interact fluidly across channels, and when doing so, they expect to have a consistent brand and engagement experience.”

-Mary Shea

Principal Analyst, Forrester

For business to business (B2B) sales, the digital transformation has affected the technologies we use to connect to prospects, how businesses sell, and the creation of a customer-centric sales funnel for prospects.

Some of the more seismic shifts in the B2B sales space encompass:

- **Selling products → selling technology, services, and software as a service (SaaS)**
- **In-person or “outside” sales → digital inside sales roles**
- **One-time purchases → subscription-based sales**
- **Sales teams working in silos → aligned revenue and go-to-market teams**
- **Sellers as primary source of information → buyers independently seeking information**
- **Single buyer with purchasing power → decision making units (DMU) comprised of stakeholders across teams: legal, governance, executive suite, sales leadership**
- **Single-time support → dedicated professional and customer success departments**
- **Uninformed buyers → steep buyer behaviors and expectations**

Changes to B2B Buyer Behavior

With greater access to technology, power has shifted to the buyer, who is more active and independent in their purchasing decisions than ever before. Under this shift, sellers are struggling to connect with prospects. In fact, according to TOPO, sales development representatives now have to do more work to connect with prospects, with more than 76% of sales emails left unopened and taking 18 calls on average to connect to a buyer.

According to ForceManager, buyers “research on the web, browse various vendors, and then maybe, maybe contact a sales representative for more information, not the other way around.”

With the digital transformation of sales, sellers are struggling to connect with prospects. In fact, according to TOPO, sales development representatives have to do more work to connect with prospects than ever before.

Phone: 18 calls to connect in-person

Email: More than 76% of sales emails aren’t even opened

Sales and the Digital Transformation Pitfall

While many sales orgs recognize that buyers have modernized, they are less certain about how to adapt. Many sellers assume that adapting to digital transformation is only about investing vast amounts of money in the best and latest technology, but neglect to consider how the technology aligns to business goals or how to enable their sales reps to use the technology to its full extent.

For B2B sales organizations, simply adding technology, or going "tech for tech" with the modern buyer has resulted in:

- **Tech whiplash:** tech stacks that are overcrowded, disjointed, and ineffective
- **Inefficient teams:** reps lack training to use the technology
- **Limited or non-existent processes:** legacy frameworks and processes that haven't been refined to support the new technology
- **Neglect to Scale Strategy:** orgs neglect to think long-term about how to drive strategy and support the tech stack

This singular focus on technology is a pitfall that spans industries and is as common as it is costly. According to Accenture, from 2016 to 2018, multiple companies across industries spent more than $100 billion investing in digital innovations to create new efficiencies, yet only 22% saw a greater than average return on their investment.[3]

The difference? These companies anticipated the organizational challenges associated with new technologies and used change management principles to create alignment, maximize adoption, and inform their future strategies.

> "The key to a successful sales digital transformation is in knowing how to analyze the extent to which your organization can **embrace change and adapt the sales technology** to drive this transformation."
>
> **-Roger Galdon**
>
> *Head of Technical Consulting, ForceManager*

[3] *Accenture, "Rethink, Reinvent, Realize: How to Successfully Scale Digital Innovation to Drive Growth," 2019.*

Investing in technology is one just step of a multi-step process toward transforming your sales team. In total, you need to determine how well your organization can—or is able to—adopt to the technology by refining processes and teams, or creating new systems to support the technology.

Leveraging Change Management for Your Transformation

If this sounds familiar, you're right: these organizations prepared their digital transformation through key change management techniques that focus on:

- **Agreeing on business goals before making changes**
- **Obtaining internal alignment on the problem(s)**
- **The role of technology in providing the solution**
- **Goals of the transformation**
- **Carving out resources to support the goals of the transformation long-term**

"**Successful sales transformation is about changing the mentality** not just within the sales team, but across all departments within the organization."

-ForceManager

Initiatives with excellent change management are:

6x more likely to meet objectives than those with poor change management

5X more likely to stay on or ahead of schedule

2X more likely to stay on or under budget

-Prosci
An Introduction to Change Management

For sales organizations looking to advance through new technologies, change management techniques guide organizations through integrating the new technologies while addressing the most common barriers to digital transformation success.

There's no one way to implement change. The specifics will depend on your company's business goals, sales strategies and frameworks, ideal customer profile (ICP), and your company's culture, but there are best practices that organizations can tailor to maximize their chances of success.

Align Transformation to Business Goals

Businesses should start by aligning on the long-term strategy for the organization to guide which digital technologies you select, and not the other way around. This is the first step to avoiding the sales transformation digital pitfall.

For example, if your business goals are to decrease the handoff time from your inbound marketing to your sales teams, increase the use of data in your sales strategies, and streamline your sales tech stack, you use these goals to decide which technologies to adopt.

In a Harvard Business Review study of 1,350 leaders across 17 countries and 13 industries, the number one challenge to digital transformation success was **"disagreement among top managers about goals."**

It’s crucial in this stage to **obtain two-way feedback** of what needs to change (vs. solely top-down).

-Hubspot

“The Leader’s Guide to Effective Change Management”

Assess the Problem Across Stakeholders

Transforming your sales organization requires internal support and champions to succeed, or you risk adding to your tech stack with a technology that no one wants to use. “Without users, tech is a failure.” To get internal stakeholders to buy-in and aligned on the need for a technological upgrade, Harvard Business Review suggests that organizations “rely instead on insiders—staff who have intimate knowledge about what works and what doesn’t work in their daily operations.”[4] Your staff already understand the compliance, governance, and restrictions inherent to your business, so ask them: what ideas do they have to solve the issues?

Sales organizations should include people across all levels of your organization: sales leaders, managers, and sales reps. While key leaders will have a sense of long-term pain points or larger landscape challenges, your sales reps are the people who experience the current state first-hand and will likely have more specifics about barriers. By involving your sales teams, they will be more willing to support and adopt solutions that they had a hand in choosing, so create opportunities—surveys, meetings, feedback forms, etc.— for them to give input early on.

[4] *Harvard Business Review, “Digital Transformation Isn’t About Technology,” 2019.*

Sales organizations should use these listening tours to understand:

- **Potential changes to individual and team workflows**
- **Individuals' comfort with the status quo and/or fear of change**
- **How to enable reps to adapt the new technologies**
- **The processes and systems that need to wrap around the technology**

Collectively, getting different perspectives will give your organization a holistic understanding about challenges at all organization levels and allows you to determine consistent pain points, their severity, and your priority finding solutions.

Machine Learning and Sales Reps

The advent of machine learning being leveraged across industries made many workers fear that they would be replaced by machines that would take over their jobs.

But Outreach, the only sales engagement platform that leverages machine learning, uses the technology to make sales reps **better at the work they already do** by automating tasks that used to require manual action, data logging, and heavy administrative work. By analyzing and highlighting critical pieces of information across emails, sales actions, and more, Outreach Amplify helps sales reps and managers identify the next best action each and every time.

The **most common reasons for opposition to a new technology** are fear of the loss of skills or power and an absence of apparent personal benefit.

-Harvard Business Review
"Implementing New Technology."

Sales organizations may find that their biggest challenge was getting their sales teams to re-learn their sales workflows. At Industry Dive, for example, they knew that they had to convince their reps that a sales engagement platform was a needed technology. Kristin Beaudoin, Director of Revenue Operations, said, "The biggest push back that we had came from our reps, despite them being fairly new to sales and otherwise invested in technology. They were saying, 'My way was working and I was making my quota. Why do I need this platform? I don't see a reason to work differently.'"

Sales organizations must recognize that "people with a long-term investment in certain routines and skills often hesitate to give up the security of those habits."[5] Be sure to emphasize how they will benefit from the sales transformation so they clearly understand the reason for the change. For instance, organizations should reaffirm the advantages of a SEP and how the added efficiencies and streamlined workflows allows them to engage smarter, rather than logging data and updates into their CRM.

While initiatives often fail because businesses neglect to have the critical conversations that communicate the need for a sales transformation, if you take the time to listen to your stakeholders, you can greatly increase their comfort and buy-in at the beginning and stay on track to achieving success.

[5] *Harvard Business Review, "Implementing New Technology," 1985.*

Determine the Change(s) Needed

After listening to all input, you'll need to decide which changes to make. Your leaders and reps may have highlighted similar or different challenges, and you'll want to determine which to take on now and which are a secondary priority. To help prioritize, you want to think through your organizational goals and priorities. Remember, making a change that is out of sync with your business goal may solve a small problem, but it won't spark a sales transformation.

For example, if your business goal is to increase pipeline by 12% by within the the fiscal year, and your sales managers identified the need for a sales engagement platform, then your business need and technological need are aligned. In Outreach's experience, our most successful customers have a clear idea of how the platform will contribute to their business objectives. Outreach's account executives and customer success managers are exceptional at understanding your business goals and tailoring the platform to your workflows and needs.

Formalize your Team and Milestones

After you agree on the change(s) to be made, formalize your plan and share with stakeholders to reduce fears and increase buy-in with your team.

Hallmarks of a good plan should include:

- **Transformation team members and responsibilities**
- **Clear and measurable milestones**
- **Cadence for reviews, meetings, updates**

Carve out your Transformation Team

Sales transformations need designated stakeholders to oversee and shepherd the transformation from start to finish. The challenge is finding the best people for the project without siphoning from the needs of the daily business.

Here are some key considerations when choosing your team:

- **Choose an individual project lead.** This gives executive sponsors a single point of contact for communications and high-level updates
- **Clarify roles for each person.** For example, if you task two people to research SEPs, make sure each individual has responsibilities within the task to minimize redundancy
- **Level of effort.** Determine if people need to work full-time on the initiative or if they can carve out dedicated hours or days to the effort
- **Success requires space.** During the time your team is working on the initiative, be sure to communicate that this effort is the top priority. Tip: for the greatest success, have this example set by senior leadership for other people to follow suit
- **Good managers aren't the same as change agents.** It's natural to predict that a successful manager will also be an effective change management leader. But be careful, warns Harvard Business Review. "That sounds reasonable, but effective managers of the status quo aren't necessarily good at changing organizations." Look for people who can solve problems but are still outcomes-driven.

Create Clear and Achievable Milestones

Transforming your sales technology is exciting, but it's not as easy as clicking install. The best way to manage your sales transformation is to break it up into clear and achievable milestones.

Milestones are well-defined and chronological steps that mark advancement toward your final goal. For example, our Outreach's client engagement managers (CEMs) have an Onboarding Plan that has clear phases, milestones, and lines of ownership to set the customer up from success on day one and throughout their customer lifecycle. This methodology ensures we deliver and implement Outreach in a way that compliments your business goals and change management readiness.

Transforming your sales technology is exciting, but it's not as easy as clicking install. The best way to manage your sales transformation is to break it up into clear and achievable milestones.

Enabling Your Team

Getting the most value and return on investment on your technology purchase is as equally dependent on the thoroughness of your implementation as it is on enabling people to use the technology effectively. This is another common misstep that businesses make—expecting that their sales reps will be able to use a new technology like a SEP on day one with little to no training or experience. You wouldn't give a Lamborghini to a person who only has a driver's permit, and yet businesses frequently overlook the need to empower and train the people who are responsible for driving your digital transformation.

"You can deploy technology, but **you cannot deploy adoption!**"

-Seleste Lunsford
Chief Research Officier, CSO Insights

At Outreach, we have seen customers have equal success rolling out the platform to their sales teams all at once, or as a small pilot roll-out to select teams first. The approach depends on your organization, your team, goals, and the projected level of change.

Industry Dive, one of Outreach's customers decided to roll out the platform to a small group of reps first to give them time to learn how to execute their sales workflows on the platform.

After the first team standardized their outbound workflows, the company incrementally rolled out the platform to the rest of the team and simultaneously created an internal group of Outreach users who became the main change agents. These were the internal reps who helped train other reps to use the platform and customize it to their needs. After each step, they re-evaluated if the previous step has been adequately done.

When considering scope of your training program, there are a number of ways to maximize adoption, including:

- **Available resources**
- **Leveraging early adopters**
- **Ongoing training initiatives**

Maximize Available Resources

First and foremost, take advantage of the resources that come with your platform. Most SaaS and technology vendors offer designated customer success managers and/or professional services to help onboard your organization and end-users. Outreach's client engagement managers can help businesses determine the scope of their onboarding needs: number of people to be trained and at what level, phases or approach, and more.

Leverage Your Early Adopters

In addition, you'll likely find that some members of your team adapt faster. Enlist these people to help others onboard and get comfortable with the new technology. These early adopters can also help identify ways to make your training scalable as you continue to add team members.

One Outreach customer, a multinational data visualization company, created an employment deployment group called Outreach Champions comprised of sales reps who were "operational masters" of the platform and wanted to be evangelists for the rest of the team. These champions became leaders that helped get other people onboarded and brought the team together. One of their inside sales managers said, "The Outreach Champion became a pretty coveted position, so now we have these little badges and stuff that people put on their desks and it's become its own thing and taken on a life of its own. Being an Outreach Champion is a big deal and something people aspire to."

Offer Supplemental Training

According to Harvard Business Review, the biggest challenge to end-user adoption isn't intelligence or skillset, it's an emotional attachment or comfort in the way that they work which has likely become second-nature.

Team members have different speeds and preferred learning methods, so offering tiered training timelines and/or different training methods can be helpful. Another Outreach customer recorded their reps using the platform to use as training materials and saved them to create a referenceable and ongoing library. To maximize your training efforts, make sure to offer ongoing training and resources to enable everyone's success.

Build a Community

Getting sales teams to adopt the new technology will take time and and getting their interest. To generate interest, McKinsey suggests cultivating “connectivity and commitment” by creating opportunities and channels for employees to share wins, asks questions, and track progress.

Mckinsey reports success with: “shared dashboards, visualizations of activity across the team, ‘gamification’ to bolster competition, and online forums where people can easily speak to one another.”

Measure and Evaluate

As your sales organization continues to transform, you will want to evaluate the efficacy of the change based on your business goals and identified key performance indicators (KPIs).

Outreach offers sales managers data on daily usage that indicates the strength of adoption and understanding about how to use the technology. Additionally, your front line managers can also identify issues or challenges that may need targeted coaching or additional enablement support or training.

New Processes to Support the Technology

At Outreach, many of our customers have likened transitioning to Outreach to being able to run after a weight has been lifted off their shoulders. After implementing the platform, sales managers and leaders have access to a deeper level of insights that highlight how processes and teams can be better utilized. In turn, sales reps are able to engage smarter and achieve better results, fundamentally altering the way that the sales organization engage with their customers and the organization at large.

While each business will have different ways of adapting to the new efficiencies, below are some of the common changes that Outreach customers have adopted to maximize their return on investment.

From Full-Cycle to Specialized Workflows

Shared Data

Aligning to Revenue Operations Model

Streamlined Tech Stack

New Metrics to Success

Faster Rep Onboarding

From Full-Cycle to Specialized Workflow

With greater efficiencies, sales organizations are able to do more work at scale, and many Outreach customers have transitioned their reps from full-cycle sales—doing their own prospecting, closing, and renewals—to teams based on workflows. For instance, with sales reps being able to respond quicker to inbound leads and reps being able to outbound prospect faster and at greater scale, sales teams had to reorient their workflows to respond to the larger volumes. Similar to the assembly line model, sales organizations are able to work multiple accounts and opportunities at once if teams are aligned to the work required rather than working each opportunity from start to finish.

At Pendo, for example, their sales team was comprised of five people who did all of their own prospecting and full deal cycles. After Outreach, however, their sales team was able to segment reps' workflows and move prospects through the funnel faster by focusing on where the customer was at in their journey.

Shared Data

Outreach tracks a sales team's day-to-day performance, allowing your organization to look across engagements to see which strategies are most effective and sharpen your messaging, content, and customer journey across touchpoints. With sales, marketing, customer success, and other customer-facing teams working from the same insights, organization can create playbooks filled with the most successful engagements and then cross-coordinate strategies and close critical gaps to make the customer journey more seamless than previously possible.

One Outreach customer used Outreach to architect seamless handoffs from their traditional and digital marketing efforts to their sales teams. After implementing Outreach, their marketing and sales teams had a handoff process that allowed them to double the amount of trade shows that they sponsored in the next year, and and double it again the following year. The sales and marketing teams were able to collaborate on messaging and strategy, and work together to create the best Sequences and create a end-to-end process to maximize their B2B lead acquisition.

Aligning to Revenue Operations Model

With a single source of data available from Outreach, all of your revenue-generating teams are able to work from the same information to align goals, solutions, and tactics better than ever before. With the silos between marketing and sales removed, organizations have opted to align all revenue-facing teams under a Revenue Operations model. This structure gives unified direction across all the revenue-generating teams to make your buying process customer-centric and cohesive in working toward the same long-term revenue goals and planning.

One Outreach customer switched to a Revenue Operations model after implementing the platform to capitalize on all of the analytics that the revenue-generating teams were able to see. They were able to align their ad operations, sales, and marketing teams to create unified messaging that creates an enclosed customer journey that is aligned with the same tactics and strategies to drive toward the same revenue goals.

Streamlined Tech Stack

Prior to Outreach, many sales teams struggle with a full but disjointed tech stack. Customers have struggled under a heavy tech stack that required reps to toggle across logins and tools to execute sales workflows, which was a slow and frustrating process for reps. After implementing Outreach, reps were able to work within a single platform and work more efficiently. Lindsey Liranzo, Director of Online Sales and Sales Development at Zoom, says, "Having Outreach to target a certain title, or a certain line of business was the real game changer because we were able to go after the right people at the right time, with the right message."

New Metrics for Success

With greater amounts of data available through Outreach, sales teams and leaders have insights into metrics that lead to opportunities and ultimately, drive revenue. Sales managers can see which Sequences lead to the opportunity, and can also go beyond open and reply rates to the prospect's intent from the email reply, allowing sales teams to prioritize their engagements greater than ever before.

Faster Rep Onboarding

As a platform that helps sales teams identify their most successful strategies per workflow—inbound, outbound, closing, and more—organizations are seeing "greater time to value" with their sales reps. Sales managers are immediately training and onboard reps immediately into the most successful strategies, Sequences, and playbooks to get them booking meetings faster.

After implementing Outreach, one Outreach customer found that their new reps were able to book **six-to-eight meetings within their first three weeks of starting.**

"I think the true test of how valuable a platform is if it's changing the way people relate to their jobs. If so, you've probably got the right one because you're solving a problem that's big enough to justify the spend. I've seen that twice now with Outreach deploying at different companies. **It changes the way people work and it changes the way, fundamentally, they approach the job, and that's the benchmark a business wants out of a software spend."**

-Outreach Customer at multinational data company

Conclusion

Technology has irrevocably changed the B2B sales landscape, and sales organizations are increasingly purchasing new technologies, such as sales engagement platforms, to advance their ability to connect with today's buyer.

To successfully transform your sales organization, use your business goals to select your technologies, and then equally elevate the people and processes surrounding the technology.

While sales optimization is as unique as the business itself, Outreach has seen many customers succeed by creating and refining new go-to-market teams and strategies to support their sales teams' greater efficiencies and data insights.

Wherever your sales organization is in its transformation journey, Outreach has the technology, go-to-market strategies, and sales experts to help you reach your goals.

Visit us today at Outreach.io.

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About Outreach

Outreach frees sales teams to focus on what matters: engaging customers. Our sales engagement platform enables reps to stand out and connect with prospects and customers in meaningful ways. Outreach brings to light what resonates best, so you can create a playbook for your entire team's success. From **startups to enterprises,** companies rely on Outreach to simplify the path to predictable revenue.

Ready to learn more?

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