

Twelve Tips On Building A Successful B2B Inside Sales 2.0 Team

by Robert Clark

Inside sales is growing at 15 times the rate of outside sales (7.5% vs. 0.5%) according to a 2009 study done by SKKU and MIT in conjunction with *infoUSA*. A 2012 study done by The Bridge Group Inc shows the number of inside sales jobs has grown 124% from 2009 to 2011. Companies are looking to grow revenue more efficiently and to better align their “go to market” strategy with the evolving buying preferences of their prospects and clients. What worked in the 1990's is less effective today and new approaches are better received. So here are some tips that can help you build and scale a successful business to business (B2B) inside sales team.

Organizational Design

According to Yogi Berra, *"You've got to be very careful if you don't know where you're going, because you might not get there."* When designing your organization, start with the end game in mind. Thoughtfully document your vision, mission and strategic goals. Then select the right business model for your team. Are your representatives going to own the sales cycle from inception to close (an “inside sales” model), or are they going to qualify and pass leads off to another sales channel (a “business development” model)? Will Business Development representatives identify and qualify leads, pass opportunities to Account Executives to be closed, and then transfer the account to an Account Manager to be serviced and cross sold? The model you choose should depend on length of the sales cycle, price point, sales volume and if leads will be primarily sourced by inbound or outbound tactics. Be sure to define key roles and responsibilities including (but not limited to) inbound Market Response Specialist, outbound Business Development Specialists, Account Closers, and Account Managers. Resist implementing "Jack of all trades" and specialize roles where you can.

Hiring Practices

Get this right and you will likely build a team of individuals who will challenge each other, build upon their individual strengths, organically develop best practices and make the sales center a fun place to work. Start by defining a profile of required knowledge and skill competencies for each role. Then advertise and hire to those profiles. Build attractive job descriptions and work with HR to present the company's jobs webpage as a fun and rewarding place to work.

Emphasize career path opportunities. Start the applicant process with profile screening, a phone interview and then a face to face meeting. Consider leveraging third party sales personality surveys (they're affordable) up front in the screening process and behavioral panel interviews for strategic hires. Engage and enfranchise many interviewers including company executives, business stakeholders, other managers and existing sales representatives. Create an evaluation template to consistently compare inputs from multiple interviewers. During the interviews, look for personal presence, attitude, energy, and communication skills. Evaluate candidate preparation, cultural fit, industry experience, and past sales success. Take a deep dive by asking each candidate to describe a recent selling situation, task, action and result (S.T.A.R.). Expect to receive a timely and professional follow-up note.

People Development

Consistent skills development derived from the centralized nature of an inside sales team can be a primary factor when justifying an Inside Sales Center. Ramp up your new hires efficiently by developing a sales entry training curriculum. Orient them by reviewing the curriculum and setting expectations for the completion of its components. Introduce new hires to the team with a walk-about and to colleagues in related groups so they know who to go to for what. Assign a peer mentor that each new hire can sit with, confide in and “hear how it's done.” Review the Sales Process Playbook (to be discussed) with them. If the role includes servicing an active territory of clients, establish priorities and a timeline for the new hire to call all of the customers to create working relationships. Schedule regular checkpoints to track new hires’ progress in ramping and completing milestones.

People development is an ongoing process. Facilitate topical conversations such as competitive positioning and client buying trends. “Lunch and Learn” sessions can work well. Leaders or subject matter experts (SMEs) should frame discussions but allow conversations to be peer to peer and weave organically where productive. Invite outside sales representatives to lead sessions where appropriate. Invest in some formal sales training and keep an electronic record to track who has attended what. Be quick to roll out new product training. When doing so, leverage company SMEs when possible but also incorporate Inside Sales Center staff and managers to accelerate knowledge transfer and acceptance. Managers should host and employees should lead annual individual development plan discussions (IDPs). These should be separate from evaluation appraisals and focus on development opportunities (skill gaps) and career path planning. Remember that great inside sales people don't always make great outside sales representatives or managers (and vice versa). Establish internal career paths that accommodate increasing responsibilities and compensation growth within the Inside Sales Center roles.

Coaching

All sales representatives should be coached on a consistent basis. Monitor and participate in their client calls often enough to make coaching an integral part of your culture. Provide timely feedback. Use dashboard metrics where the business supplies the targets and scorecard and representatives populate the metrics and identify gaps to be discussed during regular weekly “opportunity pipeline meetings.” This method where the representative “owns” his metrics promotes accountability and performance. Discuss a roadmap of activities to close key opportunities and personally engage where appropriate. Establish and recognize “Starpoints” (those who have been identified as “go-to” experts in specific product or process areas). Regularly monitor and socialize “best of breed” practices and sales approaches. Don't hesitate to put individuals on performance plans when appropriate. Consistently communicate your authentic commitment to their individual success and be quick to point out progress as well as address development gaps.

Processes

No matter how good, it's hard to scale random efforts. If you don't have processes in place, establish them. A consistent process that isn't working well is better than no process because it can be improved. Keep processes simple and straight forward. Communicate "the why", involve your people, remove obstacles, streamline and standardize on best of breed processes. All processes should be translated from a “tribal knowledge” status and documented into a “playbook” located on shared storage and accessible by all ISC staff. A playbook is a living document that ensures best practices are consistently employed and improved. An Inside Sales playbook drives scalability for growth. It is always evolving. The playbook should encompass but not be limited to “go to market” selling procedures, how to use technology tools, and how to interface with support teams and other sales channels.

Campaign Marketing

Effective sales and marketing synergy is a key success factor for inside sales teams. Outbound campaigns are characterized by a targeted prospect list, value proposition, timeline, and associated ROI goals. Communication tactics may include value add mail drops, emails, webinars, whitepapers, video snacks, web landing pages, trials, offers and tele-touches. Tele-touch messaging can be effectively executed by the Inside Sales Center within an integrated campaign. This kind of marketing and sales integration provides a "1 + 1 = 3" effect. Inbound marketing responses including search engine optimization (SEO), Google pay per click (PPC) advertising, and company website and social networking inquiries should be handled by a dedicated inbound Marketing Response specialist. Cold calling has been growing less effective and some would say should be avoided. Find ways to warm call and build yourself an" Inside

Sales 2.0" model by aligning with your clients buying preferences and integrating with effective campaign tactics.

Selling Tools

Increase your teams' productivity with selling tools. Some useful selling tools include:

- Sales Force Automation ([Salesforce.com](https://www.salesforce.com))
- Calling tips and resources ([Business By Phone](#))
- Phone dialer ([insidesales.com](https://www.insidesales.com))
- Screen sharing ([Glance](#))
- Webinars ([WebEx](#), [GoToMeeting](#))
- B2B directory and business information ([Jigsaw](#), [OneSource](#), [Zoominfo](#))
- Marketing automation ([Eloqua](#), [Marketo](#))
- Inside Sales resources ([American Association of Inside Sales Professionals](#))
- Inside Sales consulting ([The Bridge Group](#))
- Inside Sales training ([Kensei Partners](#), [Vorsight](#), [TELESMART](#))

Sales Plan Design

Research the market pay ranges for similar roles in your area. Consultants can do this for you or can validate your findings. Invest in your people. A few thousand above the average can give you access to “best of breed” talent that will pay off. Generally, inside sales people are considered non-exempt and must receive overtime for all hours worked over forty (40) in any week. Structure an “On Target Earnings” (OTE) model with a salary base component, a commissions component and commission accelerators to reward performance above quota. OTE values and the percentage of base to commission components should depend on the responsibilities of the role and the behaviors to be incented. Adopt a pay for performance model and ensure alignment with the overall goals of the sales team.

Metrics

Metrics and key performance indicators (KPI's) should be identified and tracked based on their actionability and predictive value for overall performance. Metrics should be embraced by both representatives and managers as tools to help drive success. Build “at a glance” dashboard templates for the sales staff to own, populate and bring to weekly coaching sessions. These dashboards can be broken into Activity, Pipeline and Revenue categories. Sales activity metrics include call connects, phone time, leads generated and opportunities logged. Pipeline metrics include the number of open opportunities, lead to opportunity conversion rate, average deal size, total pipeline, and quarterly/annual pipeline vs. gap. Revenue metrics can include

YTD revenue vs. goal, win rate and quarterly/annual forecast to goal. Revenue can be further broken out by new business, add-on business and renewal business.

Recognition

It's not just about money - make this stuff fun! Establish a "Recognition Advisory" group to help drive acceptance of desired behaviors. Recognize that "feeling like you've done a good job" is high on the list of employee satisfaction drivers. Catch sales people doing great things and recognize them. Share innovative approaches with the team and ask the originators to discuss them. Implement spiff bonuses for early adapter sales of a new process or new solution wins. Conclude quarterly business reviews with individual challenges ("dinner on the company if you close these deals"). Sponsor imaginative contests between individuals and groups (think Wheel of Fortune or a NCAA basketball bracket format). Offer weekly "Achieve and Leave" challenges that if attained, above goal representatives are awarded a paid "early out" on Friday afternoons. Institute formal quarterly and annual Rainmaker, Competition Killer and Innovative Entrepreneur bonuses to be awarded at team meetings. Provide details so others can learn from winning practices.

Winning Culture

The American Architect, Daniel Burnham once said, *"Make no little plans for they have no magic to stir men's blood... Make big plans... aim high in hope and work."* Establish Big, Hairy, Audacious Goals (BHAGS) for yourself and your teams. Communicate the vision in a way that is easily internalized and socialized. Post the team's Vision Statement as well as company values. Ask representatives to share their personal business vision and goals at the start of quarterly reviews. As a leader, stay on the high road and operate with a sincere appreciation for people and their efforts... your team will mirror your leadership. Inside Sales Centers are subject to a herd mentality and adverse issues are amplified. Be quick to address such issues and communicate the resolutions. Share something positive every day. Begin significant change initiatives by communicating why a change is in the best interest of the individuals and enfranchise them by creating advisory teams. Post stack-rankings of key metrics you want to focus on and recognize top performers. Build upon what works and spin the flywheel faster... momentum is a beautiful thing to ride. Have fun, listen, inspire, make people feel important, stress performance, put yourself out there and work hard to help your people to be successful.

Things to Avoid

A herd mentality will amplify the negative. Accept that some disappointments will happen and some mistakes will be made. Treat these openly as learning opportunities and put measures in place to avoid similar issues in the future. Engage and enfranchise senior management and

avoid unrealistic expectations. One size does not fit all, so avoid a cookie cutter approach based on what worked at your last company. Be ever mindful of your clients' buying preferences and align your "go to market" strategies accordingly. Avoid compensation strategies that do not drive desired behaviors. Resist a silo mentality, leverage support organizations and remember that competing outside channels can severely limit the effectiveness of an Inside Sales team. Last but uppermost, invest in hiring the best people you can afford even if it means hiring fewer of them. Poor hires will negatively affect productivity and morale in more ways than you can imagine.

A Final Thought

For me, inside sales leadership is about making a contribution to my company and my clients that I am proud of, helping my teammates be successful, and having fun along the way. Do what YOU love and love what YOU do.

About the Author

Robert Clark is an experienced Sales and Marketing executive known for leading inside sales teams to higher levels of revenue growth and market share. Bob is skilled in building great teams and instituting "best of breed" selling processes that provide a company with a competitive selling advantage. He is expert at coaching and leveraging strategic marketing, key metrics, incentives and technology to increase sales productivity. Bob has been recognized for his consistent record of success helping companies drive client loyalty and increased profitability in the software, technology and business information industries.

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