EBOOK

The complete digital transformation plan

For competitive field sales teams

The entire nature of the customer-seller relationship has changed. What was once a conversation dominated and driven by sales reps has been wrestled back by customers who, thanks to an unprecedented amount of information available online, come to the table pre-armed with knowledge on a company's various products and services.

Customers are the new dominating force. They own the conversation, deciding on who, when and how they want to engage with businesses meaning if salespeople want to remain a relevant part of the conversation, they are going to have to carve out a role in this new, one-sided relationship.

To do that sales reps must embrace a new form of **consultative selling**.

They must learn how to use technology to quickly respond to customers over digital channels while adding insights for a more personalized, customer-oriented experience that moves the sales process forward. This is the only way for salespeople to earn a regular seat at the table with their customers.

Unfortunately, many sales organizations are falling behind in this transformation. Meeting the heightened expectations of the modern customer requires a huge turn towards sales technology, sales processes, and sales culture.

This ebook aims to guide sales managers through the digital transformation process first by clarifying what the term means, the sales technology needed and a step-by-step plan for a successful implementation.

Enjoy!

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What is Digital Transformation?

Seeing as digital transformation looks different for every company it's hard to settle on one, concrete definition. Generally though, it can be defined as the application of digital technologies to different levels of business which results in a change to processes, operating procedures and culture to deliver more value to customers.

However, when speaking specifically about digital transformation in sales, what we are normally referring to is **sales enablement**, and specifically the technology required by reps, which Forrester defines in **The Future Of Sales Enablement Is The C-Suite** as:

> *A business function that helps all selling systems work in an effective, efficient, and coordinated manner to increase revenue lift, minimize costs associated with sales and deliver more meaningful experiences to buyers*

Or, in simpler terms, the **technology** required by field sales reps to maximize performance while providing the best customer experience as possible.

It's important to understand that digital transformation **does not** have to mean wholesale changes to the business's core values - it still exists to solve a specific customer pain point. It's more about how technology can enhance existing processes and improve the performance of the sales team.

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Why is it important for Field Sales teams?

In today's data-driven world, prospects expect salespeople to know who they are, what they've done, and how they have interacted with their company. To fulfill this expectation, field reps require a complete overview of their interaction history, industry details, account health, and their current context and journey.

However, without the right sales enablement technology in place, such as a fully-fledged **mobile CRM**, it's practically impossible for salespeople to offer these personalized experiences customers have come to expect. They simply won't have access to this level of detailed info, especially when traveling between visits out of the office.

Customers then become frustrated as it's increasingly apparent the salesperson they are talking to struggles to keep aligned with their needs and position in the buyer's cycle. This disjointed, fractured experience eventually leads to prospects dropping out of the pipeline altogether - clearly, a serious issue that needs addressing.

What's more, many customers in the future are likely to be digital natives, further driving the need for greater digital integration and multi-point interactions with the salesperson. This means early adopters of AI sales technology who are able to get a deeper understanding of a customer's needs will have a significant advantage over their competitors.

They'll be able to carefully map out customer journeys, determine which specific actions should be taken based on customer interactions with the company and deliver this insight directly to field sales reps when and where they need it.

The combination of sales and technology can have a huge impact on a business's bottom-line

03

What are the most important tools and systems?

Consultative selling is increasingly critical to firms' ability to win, serve, and retain their customers. To accelerate their performance in sales, companies are evaluating and adopting a range of contributing technologies, with arguably the most important being **mobile CRM**.

Mobile CRM allows salespeople to offer a better experience to customers and work more efficiently in the field. Simple data entry tasks normally done back at the office can be completed in a matter of seconds, on a mobile device, immediately after a sales visit.

The data entered into the CRM is, therefore, fresher, of greater value to sales managers as well as reducing the time reps spend on admin work, and more on sales-driving activities.

Furthermore, access to mobile sales technology moments before a visit means field reps enter fully prepared. They have a complete overview of customer history, what was discussed previously and if any problems have arisen between visits - all this information allows reps to step into a consultative sales role.

Field sales teams that employ the help of technology see an [increase in revenue by up to (58%)](#)

Artificial Intelligence (AI), Automation and Voice Reporting

Like many aspects of business, in sales what can be automated should be automated. Modern sales technology takes care of time-intensive admin work freeing up field reps to focus on consultative selling.

This is why it's critical sales directors start embracing **AI and automation**. Moving into a consultative position, building relationships, and gaining the trust of potential clients takes a lot of time and effort. AI and automation tools can deliver customer insights and offload administrative tasks, helping salespeople understand their clients' needs and nurture these relationships accordingly.

An emerging branch of sales technology which uses natural language processing (NLP), such as **ForceManager Cognitive**, gives salespeople an Alexa or Siri-like experience when conversing with their mobile CRM. It transfers their conversation from speech-to-text, significantly reducing the time spent navigating the application and, with certain automation steps triggered, tasks that took minutes can now be completed in a matter of seconds.

Also, these triggers help the CRM predict what information a field rep needs in any given situation. For example, a field rep checks in to an upcoming meeting using NLP-powered technology. This check-in triggers a response from the system which scans its real-time data bank to deliver insights and recommended best next steps to field reps, helping them to deliver the best possible service to their customers.
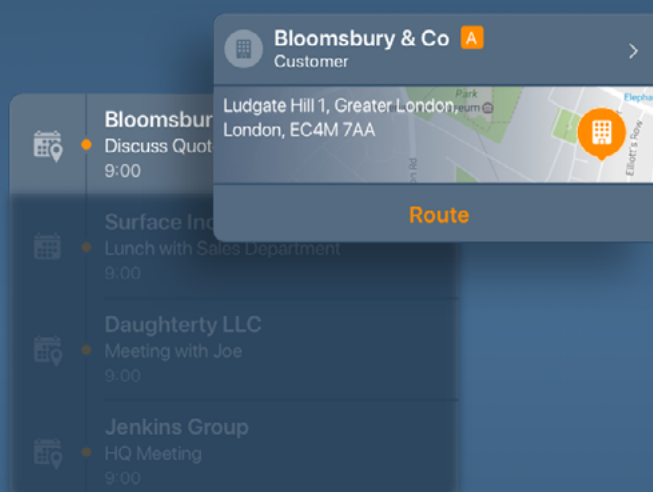
HOW DOES A
# VOICE-ACTIVATED ASSISTANT
HELP SALESPEOPLE ON THE ROAD?

8:30 — Ask Dana for a **summary of your day**, location of your next visit and when.

> **Bloomsbury & Co** A
> Customer
>
> Ludgate Hill 1, Greater London, London, EC4M 7AA
>
> **Route**

Bloomsbur
Discuss Quot
9:00

Surface Ind
Lunch with Sales Department
9:00

Daughterty LLC
Meeting with Joe
9:00

Jenkins Group
HQ Meeting
9:00

! 8:55 — **Running late?** Receive a new arrival time based on current **traffic conditions** with the option to call the client.

9:00

> Tap here to save
>
> Discuss new contract for next meeting with Josh ..
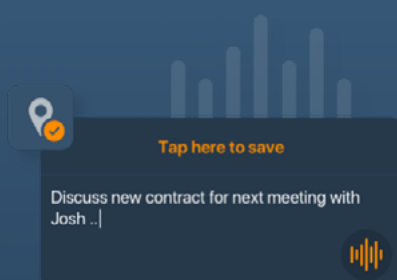
Check-in and out and record your sales visit in seconds!

10:30

The system alerts reps of accounts that need **attention** in the area.

Dave Nielsen   26 Feb, 2017
RE: Order
We received the order of 1000 units. However, 20 of the items were in a b...

12:30

Listen as **Dana** recommends **cross-selling ideas**, upsell opportunities and summarizes recent account activity.

BLOOMSBURY & CO

MRR
2.000K €

Industry
Software & Se

Recommendation
You think water moves fast? You should see ice. It moves like it has a mind. Like it knows it killed the world once and got a taste for murder.
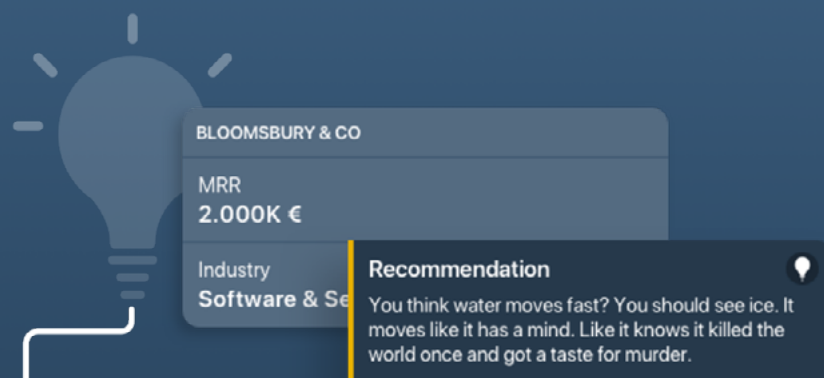
76% Salespeople admit being underprepared for their sales visits

18:30

Another simple **10s voice** check-in

🏢 **Bloomsbury & Co** ›

📍 Today at 15:00 PM - 16:00 PM
Meeting to discuss the proposal
16:05 PM

"The client is very happy with the proposal. Asked for more info about ne..."

View activity

19:00

Ask for a quick snippet of what's scheduled for **tomorrow**!

📅 **Bloomsbury & Co**
Discuss Quote
9:00

📅 **Surface Inc.**
Lunch with Sales Department
10:30

📅 **Daughterty LLC**
Meeting with Joe
12:00

📅 **Jenkins Group**
HQ Meeting
16:00

04

How to implement the technology

Digital transformation can be a scary prospect for sales directors not wanting to upset the "status quo" of their team. However, it's important to understand that the digitization of a sales team does not require a wholesale reinvention of the core business values. Managers who fall into this trap end up being pulled in a thousand different directions, not knowing which technologies to consider or how to put a structured implementation framework in place.

But if the challenge is simply to better address **customers' needs**, and help their salespeople transition into the consultative role that customers have come to expect then the decisions about which technology to implement become simpler.

Now one of the most common barriers to a successful transition is that many sales organizations are flush with traditional sellers sporting past-century skills. Their years of success using outdated techniques and processes make it difficult to convince that change is necessary, particularly where technology is concerned.

In order to overcome this, it's **vital** that directors look at the user experience (UX) of the mobile CRM system. They should be heavily focused on:

- Mobility
- Usability
- Simplicity

If it doesn't include those 3 components, it means it's complicated and difficult to navigate then it will quickly be abandoned, leaving managers in the dark on what is happening in the field and an expensive bill to foot.

The most expensive CRM system is the one that isn't used

5 FIGURES
that will transform your sales TEAM

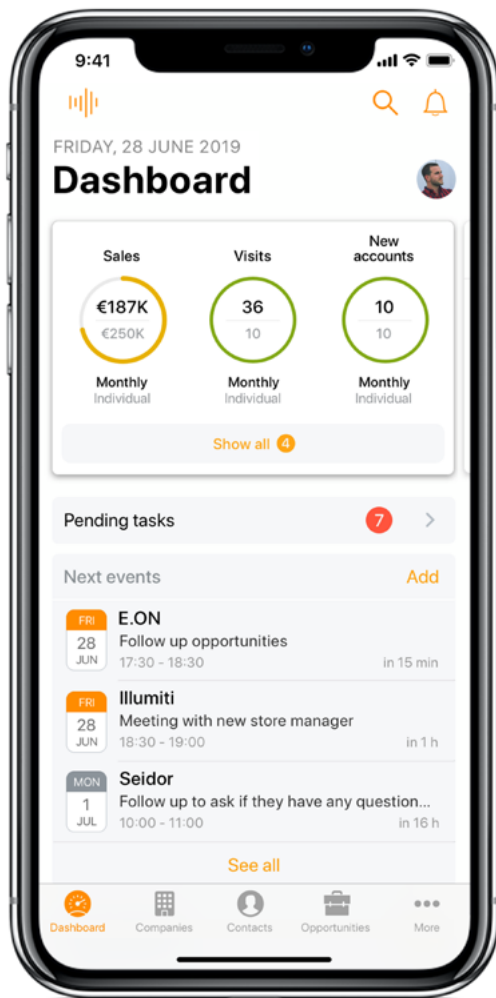If salespeople don't have a mobile tool to record data when working out of the office...

What happens?

✖ No visibility

✖ You can't monitor their sales activity

✖ You can't help improve their performance

✖ No data to make tactical decisions

How do you fix this?

Invest in mobile sales technology your field reps **want** to use

APP

100% mobile

Easy · Fast · Intuitive

20%
increase
in sales

<10
seconds upload
sales data

75%
user adoption
rate

<4 hours/week
administrative
work

¿? What do sales managers receive in exchange?

360º visibility
of the sales process

Real - time
Datos comerciales

Automatically generated
sales reports

Identify
new opportunities

Optimization
of time

Increase
sales

If managers focus on simplicity and think about what front-line users need from the app, then initial adoption levels will be high with salespeople becoming increasingly accustomed to using the system.

This is why it's recommended to discuss a vendor's roadmap for AI incorporation and the usability of their mobile application. The two are fundamental in the system's user uptake and consequently, the successful digitization of the sales team.

Once a mobile CRM with AI capabilities has been chosen, directors can start evaluating their teams against the attributes and activities required for a successful modern-day sales rep in their industry.

Based on the outcome of this evaluation, a plan and timeline can be put in place that delivers the most impactful onboarding, training, and development programs. Managers can then establish quick fixes and easy wins, and build a six-month action plan to generate some organizational adrenaline.

Again this is another key step in ensuring a smooth and successful transition process.

The final challenge is to **remove internal silos**. The whole purpose behind the digital transformation of a sales team is to meet customers' needs by effectively equipping salespeople with frontline technology.

Customers demand consistency when interacting with a business. They do not understand the immense complexity involved in streamlining cross-departmental communication, simply assuming companies have full visibility of their interactions with the brand.

Every part of a sales organization, therefore, needs to work in concert to deliver a connected customer experience, which includes transparency between marketing, inside sales, outside sales, eCommerce data, customer success teams, and indirect partners.

As it was when identifying skill gaps within the sales team, managers should identify some potential quick wins to get some momentum behind the transition while setting up both short-term and long-term goals over a six-month period.

Investing in technology means investing in efficiency, productivity and the optimization of your sales team's resources

05

The advantages of working with digital technology

"Cognitive delivers you the data you need in seconds"

▶

"

"When using ForceManager Cognitive it feels different to a typical CRM, it's more interactive. I'm asking Cognitive questions and it searches our backend of data to help provide the information I need, so I can then step in to provide the best possible customer service.".

Josh MacAvoy, Division Manager

at **Bare Metal Stanrdard**

BARE METAL
STANDARD

"Now our sales reps have little problem entering data into our CRM system. ForceManager also gets straight to the point, allowing us to track all key information before, after and during a sales call".

Phil Harvey, Sales Director
at **Gulfeagle Supply**

"The mobility for operating out in the field was really important to us as beforehand there was
a bit of a chasm; what happened outside of the business on the road tended to remain that way".
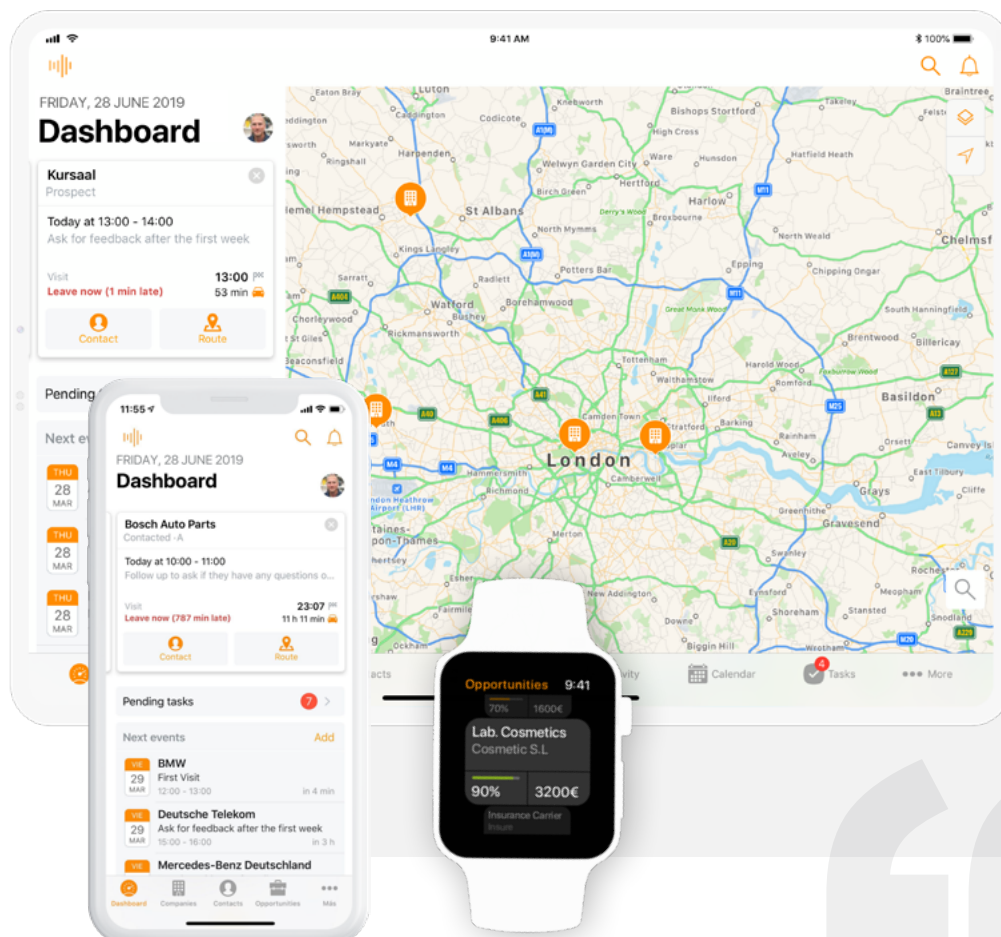
Tom Ellis, Managing Director
at **JT Ellis & Co**

"ForceManager is so flexible in its use, our reps can log calls on their smartphones and record visits on their iPads, reducing downtime as well as being able to access and share sales documents on the move".

Irene Ferreira, Technical and Sales Support Manager
at **Ascendis Animal Health**

Want to see how **ForceManager** can help deliver you accurate sales reports?

Request a Demo

A consultant will help answer any questions or queries you may have as well provide examples of how other companies are utilizing ForceManager's personal sales assistant to maximize their sales process.

Visit our Website