

How to Leverage Your CRM to Build a Killer Sales Team

By Richard Woolf, Senior VP of Sales at WalkMe Inc.



Over the span of my 25 year career in Sales, I've seen it all. I've been a member of killer sales teams, and I've built killer sales teams. Currently, I'm the head of Sales at one of the fastest growing companies in the high-tech industry. I've experienced tremendous success, as well as seen many of the pitfalls. If you've been in Sales for as long as I have, it's pretty safe to say that you've experienced the same pitfalls. Have you had sales representatives reach out to potential customers without looking at the most recent correspondence? Sales representatives who've failed to prioritize correctly and miss opportunities? Multiple sales staff who've unknowingly contacted the same potential client?

Proper customer relationship management is an essential tool to avoid these pitfalls. It's all about creating good habits. "We are what we repeatedly do. Excellence, then, is not an act, but a habit." From the moment a new Sales representative comes on board, I make sure that expectations are very clear and that he's implementing CRM processes precisely from the very beginning. How can this be done? After training hundreds of salespeople, one of my favorite topics is how we, as Salespeople, can better leverage technology to make more and better sales.

So, in the first article of this series, I will explain how to

maximize the use of your CRM, using processes that have personally worked for me.

Onboarding New Sales Staff

Your sales team can't take advantage of the power of a CRM platform if they don't know how to use the system. Training on company processes and procedures is as important—if not more so—than teaching them lingo, sale pressure points, or lists of product bells and whistles. In the beginning, I set small goals for them, while letting them learn from the veterans on the sales team.

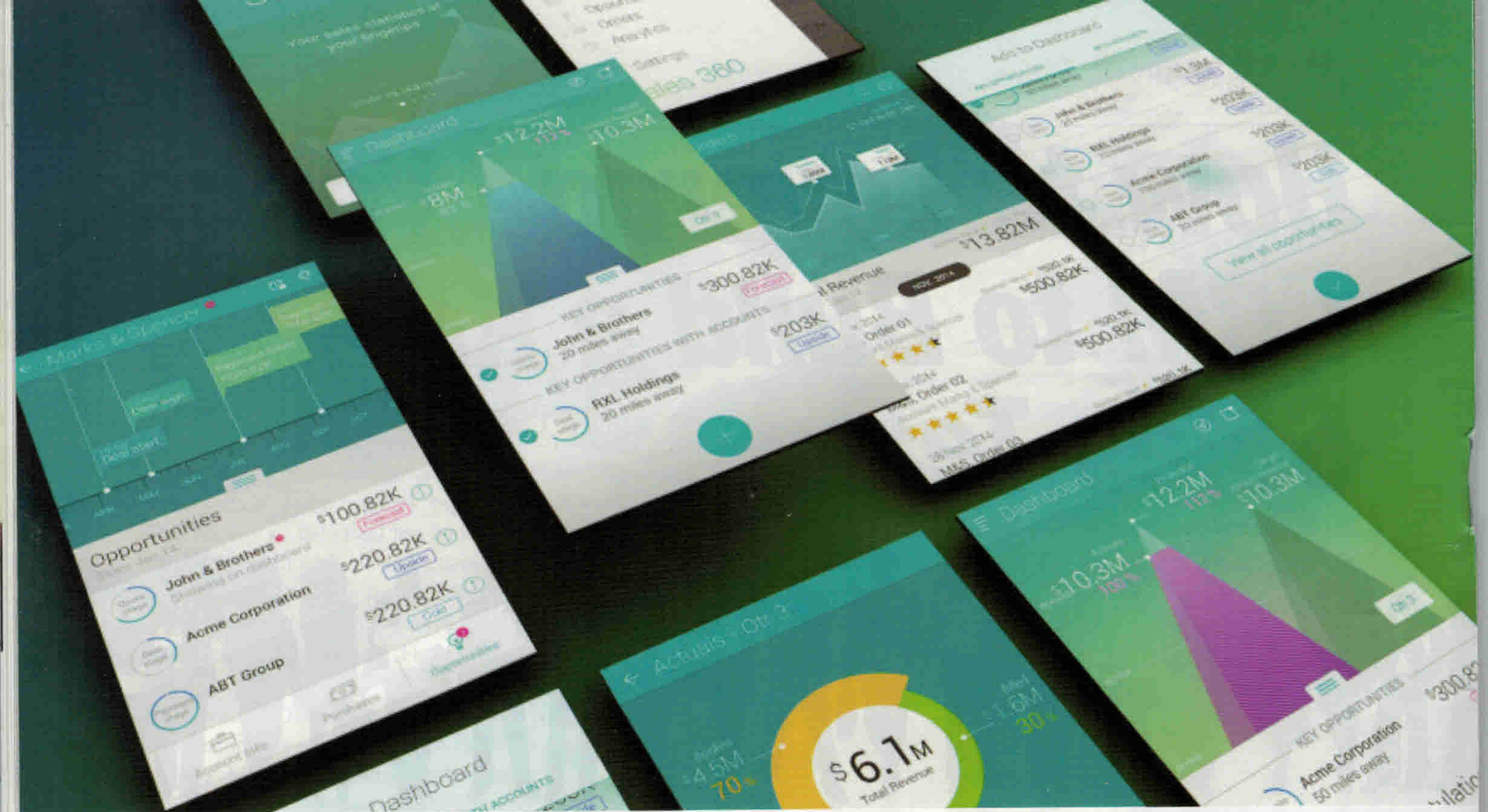
Don't be afraid to look outside the classroom for the best training methods and use cutting edge technological tools to train your staff. Guidance tools that are overlaid onto your CRM platform can automatically guide your sales team through various procedures, so that you don't have to. These tools use online walkthroughs and real-time instructions to help improve proper CRM implementation and ensure uniform CRM adoption. They can supplement—and even supplant—in-classroom training and help amplify your sales-team and maximize their efforts.

Managing the Sales Process

The real-time monitoring of sales activity is contingent upon continuous efforts by your sales team to enter and update client



Richard Woolf



information within your CRM platform. While recent improvements in CRM systems allow for some automation, many sales activities need to be entered manually on a daily basis. I make sure that our sales reps are using the CRM on a daily basis in order to track deals that are in the pipeline. I can also activate the Analytics in our online guidance system to track what type

I can plan ahead and estimate workloads, revenue and growth patterns for the coming quarter.

Boosting Productivity

According to a Mobius Poll, 84 percent of customers become frustrated when a company representative doesn't have immediate access to their account

our CRM, scores of customer data is organized and accessible via a single interface. Account histories, key contacts, customer communications, and internal account decisions can all be quickly reviewed. Our sales representatives have the ability to immediately deliver firm quotes on personalized sets of products for customers. The centralization of information also allows for greater information sharing. All members are allowed to see and know what every other team member does, which helps to avoid duplicate calls to a single lead.

You'll only be able to create a killer sales team by leveraging the use of your CRM platform wisely. Providing an environment that enables your team to master the functionalities of your CRM platform will empower them by improving efficiency, boosting sales and avoiding the duplication of efforts. Don't wander aimlessly like a ship without a port of call; make sure you have the end in mind from the beginning by creating a CRM strategy using the best tools out there. So, get to it and good luck! **CR**



A man without a plan is like a ship at sea without a port of call, he'll go whichever way the wind blows him

of information my sales staff are searching for so that I know what kind of support, if any, they need to do their jobs. In this way,

information. Centralizing information is essential to enable the sales team to operate with maximum efficiency. Through