

Epicor Modernizes Global Business Development

Epicor digitally transformed its global business development team to align reps with modern buyers.

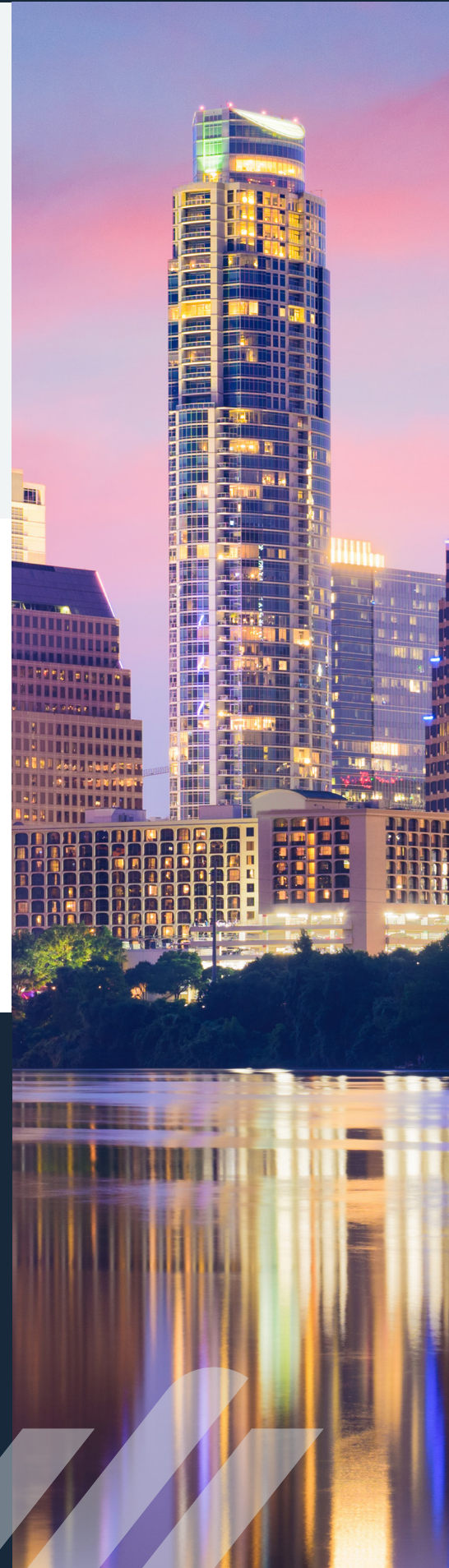
Background

Connor Moore and Darren Burton lead global business development at Epicor. They're responsible for generating opportunities in markets that include manufacturing, retail, automotive, distribution and building materials.

Their BDRs spend 80% of their time on inbound prospecting, the rest on outbound prospecting, scheduling meetings and building qualified pipeline with mostly net new target accounts.

“ Since going live, we've hit **100%** of our Q1 appointment targets and **115%** of our Q2 targets. ”

CONNOR MOORE
Sr. Business Development Manager
EPICOR



The Problem

Goal attainment used to be based on Meetings Created and Held. But reps only had a phone and their CRM, which meant the only metric leaders could track was talk time and they were unable to predictably influence sales effectiveness.

Opportunity stage progression was broken: reps reluctantly moved prospects through the funnel, or not at all. And changes in buyer behaviors compounded their issues with visibility.

“When I was on the phones I never knew which behaviors would help me hit my targets. As manager, I wanted to build a repeatable business but used to not know what to repeat.”



Andrew Sauceman
BDR Manager and former rep

THE OBJECTIVE // Connor and Darren took on the challenge of finding a solution that could put their BDRs in a position to win, and their managers in a position to help. They framed up 3 criteria for success:



Visibility: Better data to hold teams accountable



Consistency: Enforce the best behaviors at scale



Velocity: Faster and more predictable attainment

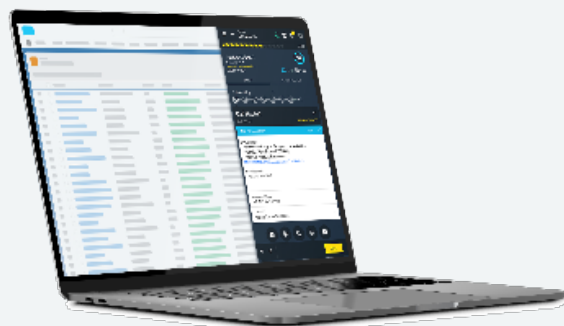
THE SOLUTION

Epicor adopted Playbooks™ across a global team of 60 BDR's to structure rep activities with Plays (multi-channel cadence) and to leverage Playbooks Automation and Prioritization.

After the initial go-live, they formed a Play committee with leaders, reps and XANT sales consultants to develop 5 targeted Plays for each market.

The team deployed an Automation Robot to auto enroll leads into prioritized Plays based on customer tiers (top prospects were Tier 1) and another to automatically move prospects through stages based on triggered events and activities.

Reps used Playbooks Insights to quickly access personalized customer information, and Smart Email Send, which helped them connect to prospects more quickly.



PLAYBOOKS™

THE RESULTS



VISIBILITY

Within days, teams operated with real-time, data-powered insights into who was contributing, how they were contributing and where they should spend their time



CONSISTENCY

Plays give Connor and his global team an effective way to enforce processes and to measure adoption of Plays, templates and prioritized prospect lists



COACHING

The quality of coaching has improved dramatically, with better visibility and more time to spend in one-on-ones



"Our managers are finally guiding reps confidently with data. And instead of spending hours on the phones with reps, we monitor calls in minutes."

Darren Burton, BD Leader



ATTAINMENT

The biggest and most visible impact has been in their attainment of setting and holding meetings with target customers



ADOPTION

Reps are aligning their behaviors to the metrics that matter most. The team has seen over 90% adoption globally, with reps reporting clear line of sight into their targets



RAMPING

They now ramp reps in days rather than months. "It has given me time I never had before," Andrew said. "I can invest in strategic initiatives to help push our business forward"



"We've hit 100% of our Q1 targets and 115% of our Q2 targets. Predictability in performance has been an absolute game changer."

Connor Moore, BD Leader

Would you like to see similar results in your organization?

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