THE DEFINITIVE BUYER'S GUIDE TO SALES ENGAGEMENT

XANT

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Digital Disruption and Market Shifts in B2B Selling

Sales engagement has emerged as one of the fastest-growing technology segments in response to digital disruption, which Forrester acknowledges has “changed buyer behaviors forever”. **Enterprise sales leaders** and managers need more effective ways to consistently improve performance and enforce repeatable processes. **Enterprise reps** need more effective ways to organize and prioritize their activities so they connect to the right customers earlier in the buying process.

Traditional systems, like CRM, aren’t doing the job. Most teams report a lack of return from their efforts and investments, and the narrow emphasis many vendors, including in sales engagement, have on ramping up just their team’s productivity has only produced an explosion of unwanted and untargeted outreach and a lot of wasted activity. More and more businesses realize the need to guide their revenue teams with real-time data insights and advanced automation so they’re better aligned to their buyers.

Key Objectives of Revenue-Focused Teams

- Repeat best practices and create predictable outcomes
- Get to leads and decision-makers faster, and have more meaningful conversations
- Build and close more quality pipeline, increasing conversion and close rates
- Shorten sales cycles
- Decrease churn and attrition

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The Challenge Sales Professionals Face

Sales professionals face a number of challenges, but it really begins with their buyers. B2B buyers spend a lot more time, 60-70%, navigating digital channels on their own, and speaking to peers and thought leaders about problems and solutions before they ever engage with a sales rep. Those same individuals are in buying groups that have doubled in size in just 5 years. And with their own set of tools and new channels of engagement and research, they're more reluctant than ever to respond to marketing and sales communications, especially while they're defining requirements.

What kind of impact do these forces have on revenue-generating teams? For reps, it means wasting time on administrative tasks, data entry, research, and more, leaving only 24.8% of their time to selling, according to Forrester. And only a portion of that is optimized: reps spend 3x more time chasing accounts, leads, and opportunities that will never lead to closed-won deals. The majority of current tools are either under-automated, leading to wild inconsistencies in performance, or over-automated, leading to a lot of untargeted spamming.

Leaders' efforts fall short without reliable visibility into who's working and what's working. They're unable to effectively enforce consistency in performance or standardization of process.

Many organizations deal with an all-too-common disconnect between the process and the message from their sales and marketing teams. When there's a lack of communication between them, they work at odds instead of in tandem. Getting the most from your sales engagement solution takes bridging the gap between them and breaking up silos.

The right sales engagement solution will help enable quicker speeds to revenue by connecting reps to buyers faster and by answering critical questions like: Who should you sell to? How should you engage? How should you organize and optimize your efforts across the funnel?

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The Core Jobs of Managers and Leaders

- Visibility into their reps' performance
- Control over how reps perform and what they spend their time on so you can coach around the right behaviors
- Enforce and measure process at scale
- Align teams

The Core Jobs of Reps

- Respond to leads more quickly
- Engage prospects and customers more effectively
- Stay organized across potentially hundreds of leads, accounts,fort with the best prospects and activities
- Know who else in an organization to engage and how
- Connect to buyers and decision-makers earlier in the journey with the right message using the best channels

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Why Sales Engagement is No Longer Optional

Sales engagement can be a catalyst for optimizing your sales professionals' successes. Even the best teams need help in today's data-driven world. That's where sales engagement comes in.

Sales engagement platforms can be the perfect complement to your team—imagine a technology that works with your sales department rather than replacing it. SE boosts productivity, hones in on the most likely buyers, and informs reps of their next-best-action instead of leaving it entirely to intuition. SE platforms lead to as much as 15% more meetings, a 27% higher reply rate on queries, and 46% higher open rates.

Top 10 Capabilities for World-Class Sales Engagement

There are several "must-have" capabilities every revenue professional should consider when evaluating a sales engagement platform. The ultimate value it delivers is dependent on the problems it solves and the objectives it helps you achieve.

World-class sales engagement enables teams to know who to engage, how to engage, and get more done in a day with structured activities, standardized content, and consistent processes.

01 | CADENCE - Your solution should have the means of quickly connecting your sales reps to the best leads and contacts, but should also be able to align engagement around opportunities and cases. It must be multi-channel, including phone, email, text, and social. It should also provide intelligent, measurable, and flexible templates and guides.

02 | AUTOMATION - Your engagement platform should have a level of automation working behind the scenes, lifting the tasks that slow your sales team down. This includes performing administrative tasks like updating CRM fields, routing inbound calls based on priority, triggering rep action based on activity, sending emails when they're most likely to get a response, and much more. More advanced automation capabilities include enrolling records into engagement strategies based on multiple CRM objects and chaining engagement strategies together to dynamically enroll records based on outcomes and client interactions.

03 | PRIORITIZATION - Success in sales is often determined by what you choose to spend your time on. Increase your output and your effectiveness by prioritizing leads, contacts, and accounts based on the propensity of your efforts with them leading to connections and closed-won business. Your sales engagement solution should also allow for intuitive task filters and custom sorting of activities based on rules and scores, ensuring that your engagement is optimized.

04 | INSIGHTS & INTELLIGENCE - Vendors must have a vision and plan for how to deliver actionable insights, including how to leverage AI to guide engagement. Access to insights from Owler, Sales Navigator, and other data sources is important but has become table stakes. The highest value potential for AI is in understanding and adjusting strategies to changing buyer behaviors. Your sales engagement solution should enrich and amplify CRM data when applied to machine learning models, and offer predictive recommendations that guide sellers through their engagement based on how buyers behave.

05 | INTUITIVE UX - Sales Engagement should replace your CRM but rather it should amplify its value and drive adoption. This means offering an experience that lets your reps work where and how they want. The core function of a cadence should be easy-to-build, easy-to-download, and easy-to-follow, and should include a fully enabled mobile experience.

Gain insight into performance so you know who's working on what, what's working, and how you can coach, motivate, and enable teams more effectively.

06 | RELIABLE INTEGRATION - Good reporting and insights begin with reliable integrations. As stated, Sales Engagement should not replace your system of record, but rather be your system of action to amplify the value of CRM and accelerate your impact on revenue. When the connections between Sales Engagement and CRM fail, it disrupts the entire business. An enterprise-grade platform should always be on and always be ready, won't require manual data entry, and provide tools and insights for the right API connections to invest in and monitor, as well as recommendations for which ones to avoid.

07 | REPORTING - You should be able to derive actionable insights from a variety of activity and outcome metrics (like conversions) that include in-depth drill-downs. Understanding which measures of success matter requires additional fields and reports in CRM but produces cadence-level intelligence. A/B test engagement sequences, templates, and messages, along with the effectiveness of lead sources and your performance across industry segments, to determine where to invest your efforts.

08 | COACHING & ENABLEMENT - Front-line managers need tools to better coach, motivate, and enable their reps for success. Your solution should give them the ability to record and monitor both inbound and outbound live calls, no matter where they work, view inbound call queue wait times, whisper advice to reps, or join calls as active participants. They should be able to motivate their teams around the metrics you care about, and track performance against those metrics with individual scorecards and leaderboards. And they should be able to measure the performance of content and templates, in addition to measuring individual rep performance, so they can coach to best practices.

Amplify the value you get from CRM with higher adoption, better data, and a stronger integration that enables you to get more done with less.

09 | ENTERPRISE-GRADE PLATFORM - The risks of operating a digital sales team, often on a global scale, are mitigated by having a stable and secure architecture. Enterprise-grade data governance and security protocols are critical to meet global compliance standards (e.g. FTC, GDPR, and SOC2). But it should also encrypt and anonymize data, and allow businesses to enforce secure data capture in CRM. It should provide critical insights to leaders and reps, and support multiple team dynamics, varying roles and permission sets, and more, all from a single instance.

10 | SUPPORT & SERVICES - Software purchases alone do not lead to value realization, especially within the enterprise. Your sales engagement solution provider should offer services that include: basic technical support, dedicated account management, training and onboarding, user optimization consulting, optional advanced technical support, optional change management, and sales consultation. Meaningful digital transformation is a function of aligning the proper level of service to your core business needs, in addition to selecting the right technology solution.

Change Management

Justifying the "why" for a sales engagement platform is only one part of what should be a much broader investment decision. What's the other? How to lead a successful change initiative so that you realize value from your sales engagement platform.

The Digital Journal, citing a study from Crunchbase, reported "that 90 percent of digital transformation projects have either fallen below planning expectations, delivered only minor improvements or altogether failed." How do you make sure yours is successful?

Your change directive isn't to fight the headwinds of an active resistance to change. There may be elements of that, but the greatest barrier to change is inertia—employees tend to simply remain unchanged.

Without the right external forces and internal motivators, people will continue to do what's comfortable.

Your true change directive is to motivate people to move in a new direction and to maintain momentum without reverting to old habits. There are three keys to doing it right:

1 | Offer a compelling vision of the future, call out what's at stake, and what's in it for them

2 | Clearly define what you'll measure, how, and in what time frame

3 | Build a coalition of advocates

Take a deeper look at change management in sales >

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The Case for Playbooks™ From XANT

The recently published Forrester Wave for Sales Engagement (Q3 2020) report described XANT as "an ideal fit for enterprise companies that want to help sellers better execute on buyer-centric sales strategies." Sales teams must focus on those they're selling to — their needs, their use-cases, their benefits.

Take a look at what our clients have to say about Playbooks:

"It helps prevent leads from slipping through the cracks, reduces the time from 1 lead to another, allows easy but customizable email templates, and overall increases my total touches/day by 2 fold at least. It helps you focus on calling and not on organizing your activities, having a lead in PB vs. not in PB is night and day. When they are in PB there are 5x more touches, and their entire contact history is right there so you are instantly up to date. Also, the support is great."
— Adam K, via G2.com

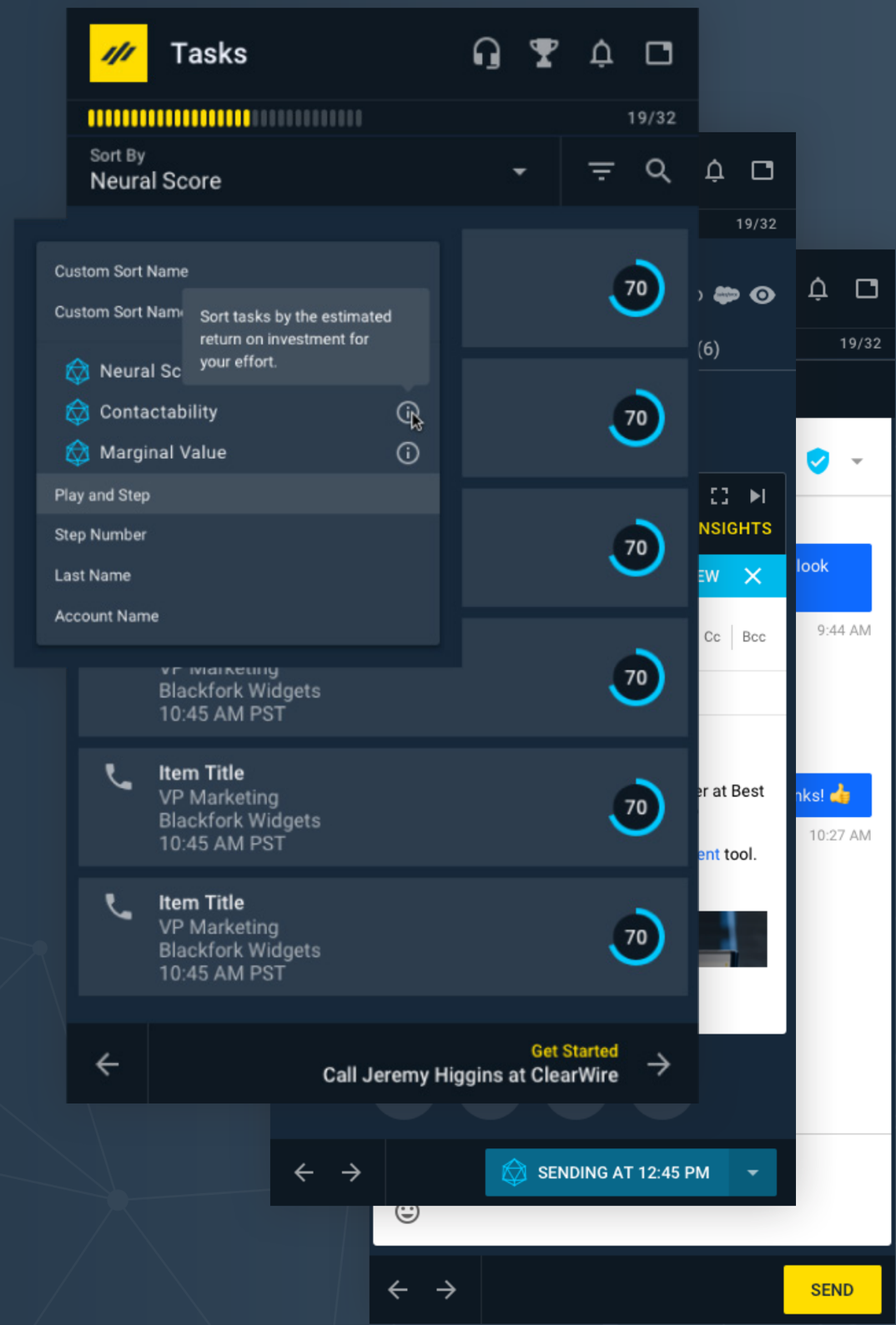
"XANT is the leading sales enablement platform for a reason. Their interface, integration setup, and overall user experience from onboarding to launch was very easy, fairly quick, and overall a good experience. Additionally, their ongoing support and user experience have been great."
— Collin T, via G2.com

"I love that Playbooks allows you to take notes about your call. I love that its smart enough to figure out which numbers usually work or don't and if it's a duplicate. That's super helpful when making calls. I love that you can send an email according to the most frequent opening time of the sender. so smart! Overall just super well thought out and easy to use"
— Allison I, via G2.com

PLAYBOOKS

Power Up Your Sales Teams

Keep up with the competition by investing in a sales engagement platform to initiate a buyer-centric sales strategy. 90% of sales managers stated they plan on investing in technologies and new methodologies that help sales teams reach their customers in more meaningful ways, at an enterprise scale. With more managers investing in technologies, buyers will find more personalized and more relevant pitches to their lives. Beat the competition with the best-in-class platform available.



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