The 5 Most Powerful Uses for Automation in Sales

There is a common misconception about automation that it's really just good for email spamming and getting more activity out of your reps. This thinking leads to massively underusing what could be one of your most powerful assets. Automation should be integrated into your entire sales process, aiding reps to be more efficient with their time.

Use automation to scale down the things that don't work, scale up the things that do, and get more from your effort.

Automation and AI are on the up and up, companies are starting to catch on. According to the State of Sales Study from Salesforce, high-performing teams are 4.9x more likely to rely on AI. They also project that over the next two years in top tech markets, marketing automation will grow 104% and sales process automation will grow 86%.

Relying on automation eliminates human error, increases efficiency, and saves your organization massive amounts of time and money.

How much time are you wasting?

Spend time on selling and automate the rest.

State of Sales from Salesforce says reps only spend 707.2 of the 2,808 or just over 25% of working hours in a year selling. We found similar findings in our research. We surveyed over 700 sales reps and found they are only spending 14 hours of the 40-hour workweek, or 35% of their time, on revenue-generating activities. These revenue-generating activities included external customer-facing meetings, following up with clients, and prospecting.

And all of this research doesn't even address reps spending time working leads that don't go anywhere or chasing deals that don't close.

So, what is soaking up sales reps' time? Administrative tasks, data entry, time management, team meetings, and other tasks take up the day and don't leave reps with much time to do what they were hired to do—sell.

According to a recent study done by Forbes, 54% of employees surveyed stated that they could save up to 2 work hours a day with automation. If an employee makes an average of $77k annually—just saving 2 hours a day would mean saving $9,240 a year for that one employee. And think how much more of an impact you'd have by replacing it with more productive selling activities!

A study from the Harvard Business Review monitored several major companies and found that those that invested in advanced sales information technology and relied on automation often saw ROIs that exceeded 100%.

No matter how you spin it, or who you ask, it's clear that reps are bogged down with time-consuming, non-revenue impacting activities. This is a problem and the proper use of automation is the answer. Adopting automation throughout your sales process is a key driver of cost efficiency and increasing sales.

How is automation being used?

How *should* it be used?

As previously stated, automation is most often used to spray and pray. Scorching the earth with mass emails and hoping for the best will not yield consistent, revenue-impacting results.

Weave automation and AI through your sales process to eliminate human error, save time and money, guide reps' efforts, and produce a reliable, fool-proof workflow.

According to McKinsey, about ⅓ of all sales tasks can be automated. For a more effective sales strategy, they suggest automating:

- Pipeline management
- Action plans for new and existing customers
- Quota setting
- Contracting
- Invoicing
- Regular follow-ups
- Reporting
- Data sync and analytics
- Training
- Administrative tasks
- Targeted outreach
- And more

The benefits of automation in sales are undeniable and these are only a few broad examples. How can you reap the rewards of automation use in your sales process? When used in an optimal and intentional way, automation solves several problems. Below we've got 5 hacks to master automation and power up your sales team:

Five Automation Uses to Power Up Your Sales Team

1. Automate Full Activity and Outcome Data Entry

The Problem: Reps spend hours manually entering data when it should be automated. Data integrity is compromised as it may be recorded incorrectly. Poor integrations do not sync fast enough/well enough to provide the most recent, relevant, and reliable data. (Most sales engagement platforms offer only a 24-hour batch data sync, and still require manual review and correction.)

The Solution: Don't spend precious sales time enrolling records, recording record changes, or capturing all of the important interactions and outcome details to your CRM—automate it. Eliminate human error, save time, and ensure lasting and secure data integrity.

How Playbooks Helps:
Customers on Playbooks enjoy a complete bi-directional sync with their CRM, powered by a native integration, which updates all record changes across 5 CRM objects and 25+ additional fields, and it does this every 10 minutes or faster if requested.

2. Automate Lead Routing and Assignment

The Problem: Without proper ownership rules or routing capabilities, opportunities fall through the cracks at different (and often several) places in the funnel. Teams can get locked out of important records if a rep falls behind or is out of the office. Avoidable bottlenecks inevitably pop up when you have to manually assign records/leads—managers use up their time making assignments, leads don't get worked in time, contacts get lost, etc.

The Solution: Automatically enforce processes that can be standardized while gathering reliable data throughout. Determine where opportunities are dropping and where your process is lacking. Optimize opportunity engagement through each stage of the funnel. Segment your customers with unique workflows and record ownership. Assign ABM accounts for personal rep ownership while giving your team the flexibility to jump in and help work hot inbound leads.

How Playbooks Helps:
Playbooks give reps the flexibility they need to ensure the best engagement. Reps can designate records as shared—allowing other reps to access important contacts, preventing lockout, allowing for management of an influx of leads, and ensuring that all leads get worked in a timely manner—or private, so individual reps can manage their assigned, targeted books of business. Playbooks can also assign a priority level to records based on rules, embedded propensity score, or both—enabling you to easily build more pipeline and close more deals.

3. Use Activity Triggers and Alerts to Increase Engagement

The Problem: Reps get weighed down and forget to follow up in a timely manner. A rep may fall behind, be out of the office, or simply be working on other important tasks. Neglecting follow-up tasks can cause hot leads to go cold, stop deals from progressing or renewals from closing, and ultimately put revenue at risk.

The Solution: Alert reps when activity occurs on an account or record, or when a predetermined amount of time has passed without engagement. Keep reps organized and ensure they stay on top of all tasks with all customers, without overwhelming them.

How Playbooks Helps:
Playbooks gives the advantage of time-based alerts and activity triggers. Reps are notified when too much time passes without engagement on an account and prompts reps to take action when changes on a record occur.

4. Auto-Enroll Records and Progress Opportunities with Chained Cadences

The Problem: Leads go cold as they fail to get enrolled, get enrolled in the wrong cadence, or get stuck in a stage. Reps waste their time working leads with the wrong engagement strategy.

The Solution: Auto enroll leads and smoothly transition opportunities into the proper cadences. AI can tell which cadence is best for each opportunity based on their interest and previous engagement. This information can also tell you which email and pre-recorded voicemails to automate for the best possible outcome with each lead.

How Playbooks Helps:
Playbooks can not only score opportunities by their likelihood to close but will also auto-enroll opportunities into the appropriate Plays by sales stage. It will prompt reps to take clearly defined actions and automatically progress opportunities through the pipeline.

5. Enrich Data with Automation

The Problem: Unreliable data is another big time-waster. Without the right data to guide them, reps use precious selling time chasing the wrong opportunities, reaching out to the wrong contacts, and engaging in the wrong way. A slow or weak data sync can put you behind. Additionally, corrupted data can lead you down the wrong path.

The Solution: Enrich your data and arm your reps with more information on leads. A lead enrichment tool can pull information about leads—the companies they work for, their role in the buying committee, and their previous engagement to provide an accurate profile of each potential opportunity. Reps can work the leads most likely to engage, in the way that is most likely to engage them.

How Playbooks Helps:
Playbooks automatically captures activities and outcomes from across the user ecosystem, and, with a native and secure integration with CRM, updates the system of record based on the most current information available about buyers, their behaviors, and the committees they're part of.

Conclusion

Automation and AI are fueling the future of sales. The way you adapt and utilize automation will determine how your sales team performs in the future and give you a superior competitive advantage. In the past, automation has been used as an email spamming tool, but it is so much more. Automate time-consuming, non-sales related tasks to eliminate obstacles to efficiency, give your reps hours of their day back, and enable them to sell more. Create a machine that enables your reps to pump out repeatable successes with the proper use of automation.

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