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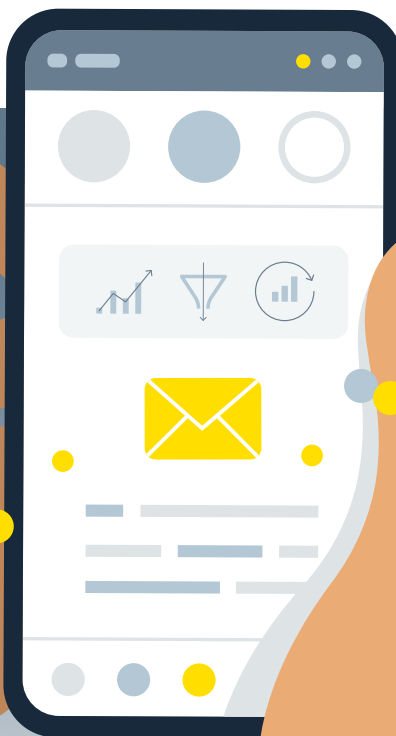
THE DIGITAL FIELD REP OF THE FUTURE

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The Digital Field Rep of the Future

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52.8% of sales professionals in the US are designated as “field” sellers.¹ That means that because of the 2020 pandemic, over half of US salespeople in 2020 were not able to get to where they normally do their job—in the field, at customer sites.

Since field reps carry larger quotas than inside reps, this means well over half of US quota capacity was disrupted in 2020 and into 2021. Field reps were selling from home, mastering new approaches to digital selling. Which begs the question: when things go back to “normal,” will our field reps get back in the field?

The truth is, [Sales is Never Going Back](#). We will never again do field selling the way we did it before. Why?



The world has changed. [Buyers figured out how to do their jobs](#) without onsite meetings, and they see no reason to go back. If board meetings, M&A transactions and international summits can be handled by video conference, why not a sales meeting?

We've gotten better. As sellers, we have found ways to be more efficient and in some cases even more effective working remotely.

The CFO won't let it go back. Having spent a year not approving expense reports for out-and-back sales trips, the CFO is not inclined to ramp travel back up to previous levels.

¹Josiane Chriqui, Jan 2019, [19 Inside Sales Trends in 2019](#)

Digital Field Sales

We believe this is a unique moment for sales. The 52.8% of sellers whose superpower is face-to-face, in-person selling will never again rely so exclusively on in-person tactics. We are adding digital tactics and strategies to our toolset, and we are becoming more powerful because of it.

"How can you have an edge in the modern outbound sales climate? You can't be smart enough, and you can't be empathetic enough to win in the current noisy and weaponized reality. You must master the new sales technology systems themselves—the UI, the UX—to gain a competitive advantage in the Roaring 2020s as we deal with increasingly uncertain economic times and move further toward fully remote selling models at scale."

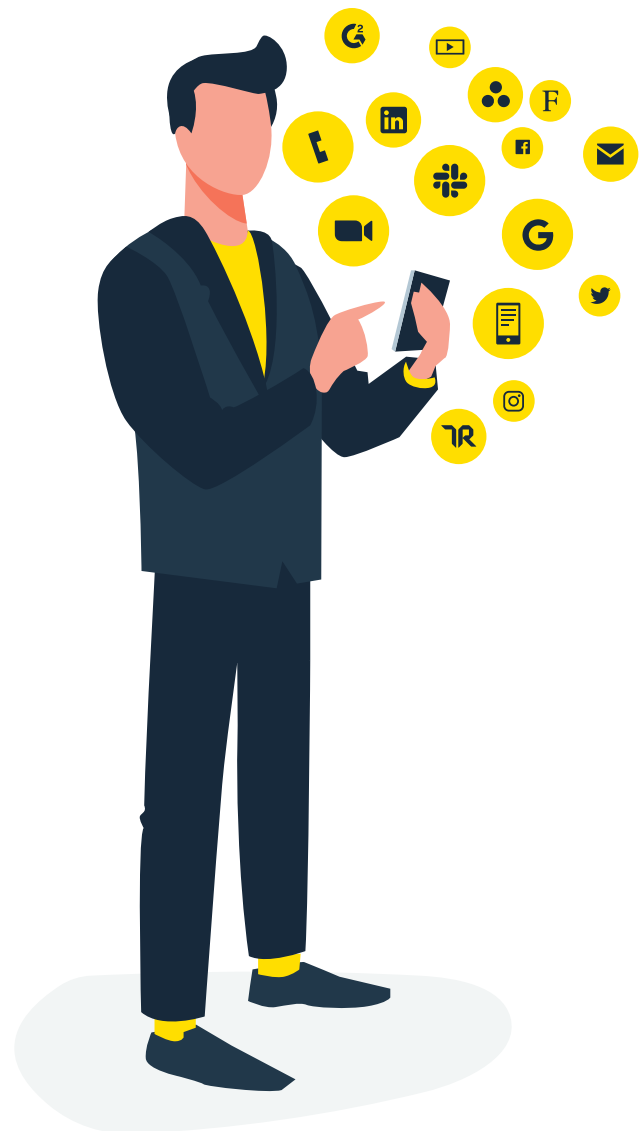
Justin Michael | Sales Futurist

This does not mean it's time for field sellers to pick up the inside sales playbook. We do not expect field reps to suddenly sell smaller deals with faster sales cycles--that's a motion optimized for well-known inside selling processes. No, this 52.8% of reps who collectively carry ~70% of sales quotas will continue selling large and complex deals. But if buyers won't welcome us onsite like they once did, and if buying teams themselves are only in the office sporadically due to hybrid working policies, we need new ways to get our job done.³

This new selling motion deserves a new name: Digital Field Sales. "Digital" because field reps have adopted digital instrumentation, interaction and automation. These capabilities were adopted of necessity, but they have proven to provide tremendous leverage for

sellers who seized the moment and embraced them. We believe these shifts are permanent and will become standard for the new generation of digital sellers. But field sellers will not give up their traditional territories, sales cycles, processes or deal sizes. In that sense they will continue to be "field" reps: Digital Field Reps.⁴

Before diving into a more detailed view of the future, let's define Digital Field Selling.



²Forrester, July 2020, [Future Onsite Sales Meetings Will Come at a Premium](#)

³For additional perspectives on adjusting to the new normal of B2B sales see:

[Accenture, June 2020, The New World of B2B Sales & Deloitte, Virtual Sales amid COVID-19 and after](#)

⁴The transition from field reps to digital field sellers is supported by growing confidence in remote sales tools and methods. For information on customer attitudes towards remote buying, B2B sellers' opinions and the prevalence of future hybrid field/inside sales roles see: [McKinsey, Mar 21, Omnichannel in B2B sales: The new normal in a year that has been anything but](#)

What is Digital Field Selling

Digital Field Selling relies on the following features:



1. **Franchise Owner.** Just like a franchise owner, the Digital Field Seller of the future has secured the rights to a territory, and she is empowered and enabled by her company. She knows what good looks like, and she has the tools to make her territory perform. More on this below.



2. **Digital First.** Unlike previous iterations of field selling, the Digital Field Seller is "Digital First." In our article [The Future of Sales](#), we defined the future as:

- Fast
- Always Online
- Customer Centric
- Content Rich
- Technology Enabled

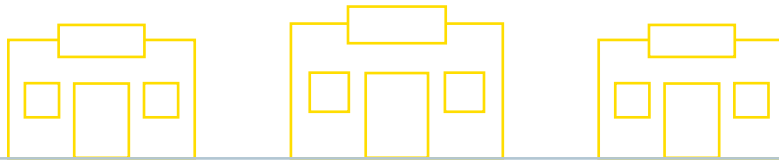
The Digital Field Seller accomplishes all the letters of that acronym—FACCT—leveraging digital first. Fast because she's digital. Always Online--digital. Customer Centric to the degree the customer wants it that way (which is most of the time). Content Rich--hyper digital. Technology Enabled—digital.



3. **Full Funnel.** When it comes to funnel management, the Digital Field Rep is "pull", not "push". She has a view of her entire funnel—she must, or she cannot run her franchise—and she knows what is needed at any given time and how to get it—she "pulls" vs. waiting for marketing to "push." The Digital Field Rep manages all stages of her funnel—early, mid, late—and she holds her extended team accountable to keep her territory fed for this period and future periods.



4. **Numbers, not Numbers.** More on this below, but the Digital Field Seller is no more inherently quantitative than her predecessor, the Field Seller. The difference is, the Digital Field Seller has numbers working for her in the form of alerts, notifications, and heads-up information about her franchise that help her run her business. She may not spend hours in spreadsheets, but she runs her business by the numbers.



Franchise Owner

XANT teaches reps to treat their territories like McDonald's franchises. It sounds funny at first— isn't McDonald's a fast food restaurant, whereas we are selling high-end enterprise software? Isn't that disrespectful of what we do?

It is not disrespectful—it is empowering.

Consider the path of a McDonald's franchise owner. Similar to the competitive hiring process for a sales professional, McDonald's carefully screens potential candidates to make sure they will represent the brand well. Potential owners must demonstrate financial solvency, business acumen, and a track record of success.⁵

To ensure precision and consistency, McDonald's certifies restaurant owners through a formal program called Hamburger University. The chain has various campuses around the world (the largest in Chicago) where restaurant owners and managers are groomed to operate a successful franchise. Although McDonald's humorously refers to this certification as a degree in "hamburgerology" the classes are no joke. Over 1600 universities accept a Hamburger U degree as transfer credit for up to 23 hours worth of classes.

The classes in Hamburger University focus on how to solve difficult issues running a franchise. Courses range from back-office inventory and bookkeeping to simulated situations in test kitchens. Hamburger U

degree seekers practice working with unruly teams, irate customers, confusing orders, and much more.⁶ When students fail, they receive classroom instruction from experienced professors and try the simulation again. Classroom simulations are supplemented by a learning period in a real McDonald's where prospective franchisees work in an existing restaurant before being considered for their own franchise.

Most McDonald's franchise owners are not quants. They do not have ivy league MBAs. Many have never owned a business before. But they know how to run one. They know inventory, logistics, marketing, sales, management, P&L, capital expenses, operating expenses, staffing, warehousing, store management, basic accounting, and HR. Why do they know these things? They learned them through Hamburger University, regular mentorship, and a system that was built to ensure they succeed.

As Jim Collins emphasizes in *Good to Great*⁷, it's best to manage systems, not people. "The point is to first get self-disciplined people who engage in very rigorous thinking, who then take disciplined action within the framework of a consistent system...."

Given disciplined and self-motivated people, the only thing needed to succeed is a well defined and well resourced system. McDonald's has such a system. Successful Digital Field teams will have such a system. Will you?

⁵ For more insight into becoming a McDonald's franchise owner see the [McDonald's Franchise Application Form](#) and [Franchising FAQs](#)

⁶ To see Hamburger University in action watch: "[Inside Hamburger University](#)," CNN

⁷ Collins, J. (2011). *Good to Great: Why Some Companies Make the Leap...And Others Don't*. United States: Harper Business.



FAST



ALWAYS ONLINE



CUSTOMER
CENTRIC



CONTENT-
RICH



TECH-
ENABLED

Digital First

"Sales is a contact sport."

Ayal Steinberg | VP Global Sales, IBM Data, AI & Automation

It seems strange that field sales of the future would be "digital first." But here we are. We will either embrace this simple reality or we go extinct. Embrace doesn't mean merely accept—it means wrap our arms around it and get to know it intimately. "Digital first" is not a temporary inconvenience while we wait for things to go back to "in person." Digital first means first and always. And with that realization, let's dive into the future.

We know about click-to-call, video conferencing, sales engagement (e.g. XANT Playbooks), LinkedIn and Slack. Those were table stakes even before the era of Digital Field Sales. For the future of Digital Field Sales these technologies are prerequisite, because the future is at the doorstep, and the future of digital sales is wild.

Let's take a look at some of the tried-and-true rituals of field sales and examine their digital successors.⁸

The Conference Room

Many deals have been architected or finalized in a conference room. Field sellers work for weeks or months to get the right set of stakeholders committed to meet in a conference room and confirm their understanding of the path that leads to a purchase. It's great to have everyone in the same room, because then we can read the room. We learn from body language, by watching who defers to whom, by observing posture, by paying attention to non-verbal signals between players. We sometimes get our best information in the hallway before the meeting, during breaks, and after the meeting.

Virtual meetings just can't replicate the conference room.

Or can they?

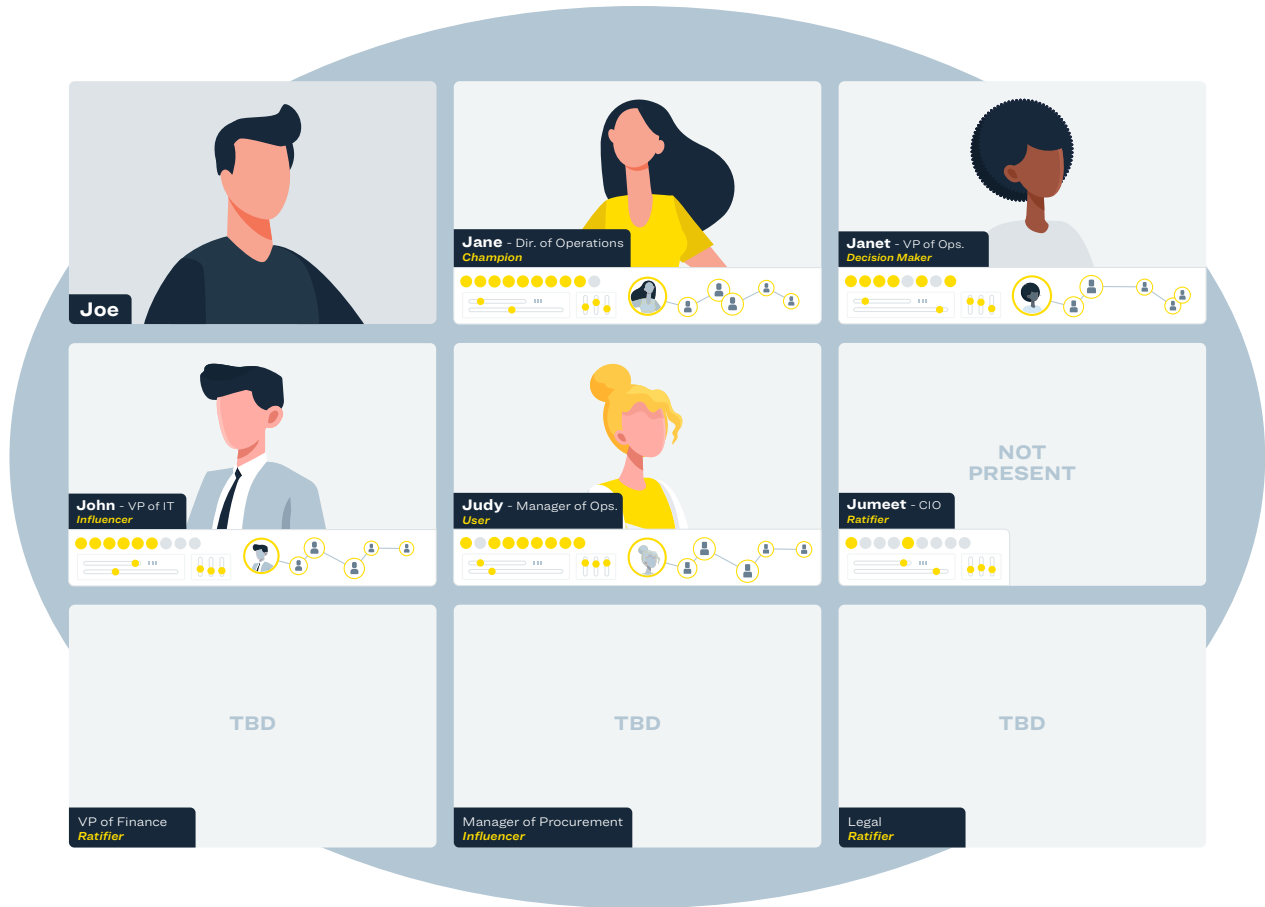
Today's video meetings leave a lot to be desired. But we have to think differently. Imagine a "Smart" Digital Meeting. This Smart Digital Meeting is attached to an opportunity in CRM. Intelligence fed by XANT or another intelligence vendor shows who will be required to close a deal:

- People in the meeting
- People we know who are required but not in the meeting
- People we haven't met yet.

⁸ COVID-19 has catalyzed a digital transformation across industries for more information see: McKinsey, Oct 20, [How COVID-19 has pushed companies over the technology tipping point—and transformed business forever](#)

Each square in the Smart Digital Meeting represents a required "role." Some of those squares are empty if we haven't yet identified the final approver from finance,

for example. But for the squares that are not empty, we have more information available in this format than we ever did in a physical conference room:



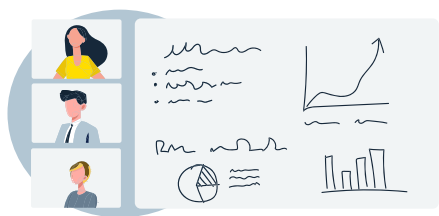
In a Smart Digital Meeting, each participant shows up with digital footprints—what has been their engagement to date? What level of influence do they typically have on a deal? What is their signatory authority? What assignments do they have that are still pending?

In some ways, the Smart Digital Meeting is not as good as an in-person meeting (it is impossible to replace

the in-room dynamics of a physical meeting). But in other ways it is far better—key stats and predictive information about each person in the meeting are displayed in a heads-up fashion. The Smart Digital Meeting also syncs with any Digital Mutual Action Plan that may be in play (see below).

The White Board

Another real challenge of meeting virtually is the lack of a whiteboard. Word documents and spreadsheets can be useful, but they lack the spontaneity and freedom of being able to draw. It is not uncommon to see team members holding nearly illegible paper drawings up to webcams. Thankfully, a variety of software and hardware solutions can help bridge this gap.



Imagine a world where all meetings are hybrid (some participants in person, some remote). How helpful is the physical whiteboard now? (Not very.) In this world, the whiteboard goes online. Each participant has an input device (keyboard, mouse, touchscreen, sketch pad, and stylus), and each participant has a display. Anything added to the whiteboard by anyone is visible to everyone. So someone might drag a new shape onto the canvas. Someone else might draw something, and someone else might link something.

In this world, no one is at a disadvantage because they are not physically in a conference room. Everyone can step to the “whiteboard” as they would in person. And they are able to do much more than draw--they can rely on cut and paste, links, and integrations with outside apps.

With so much functionality, digital whiteboards will quickly outpace their physical counterparts. Since everyone-in-the-same-room meetings are a thing of the past, we predict digital whiteboards will be a key feature of the future.

The Mutual Action Plan

The Mutual Action Plan (some call it a close plan) is a tried and true method of keeping track of all actions needed to close an opportunity, as well as who is responsible for each. Mutual Action Plans have long been built-in MS Word or Excel and emailed back and forth. But what does this look like in the future—a Digital Mutual Action Plan, if you will?

In the future, each prospect named in a Digital Mutual Action Plan (DMAP) is a contact on the opportunity in CRM. The DMAP is hosted in the cloud, where their CRM identity is synced with an email, a cell number, a slack address, a Teams handle, or whatever communication methods are being used on the deal team. In addition to the prospects’ contacts, the vendor-side contacts are similarly named in the DMAP, along with their profiles and coordinates.



The DMAP contains tasks, timelines, and dependencies assigned to contacts. It maintains a single point of view on opportunity progression, and it reminds people when tasks are pending. The DMAP syncs this view into every Smart Digital Meeting (see above) as well as back into CRM, and all communication facilitated as part of the DMAP is logged.

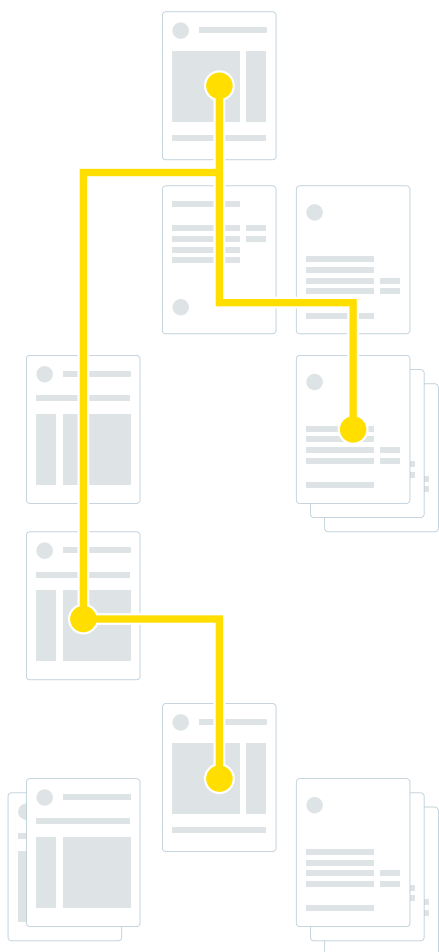
The Mutual Action Plan is a powerful way to move a deal toward closing in a mutually agreed way. But the Digital Mutual Action Plan is even better. It facilitates real-time, omni-directional updates; seamless digital communication; lightweight project management; and automatic tracking of timelines, due dates, etc.⁹

⁹ Similar to how the DMAP coordinates and tracks interaction during a sales process, customer experience reps and other expansion-focused sales people benefit from an integrated digital tool set. Read more about how integrated digital tools help accelerate those motions in: Bain, Sept 2020, [Customer Experience Tools and Trends: Let No Tool Stand Alone](#)

The Deal Room

Over the course of a typical complex deal cycle, dozens of documents are exchanged, revised, redlined, and ultimately signed. These include marketing materials, quotes, configuration docs, checklists, project artifacts, and contracts. Similar to the MAP, these exchanges historically have happened over email with the attendant complications around version control and visibility.

The Digital Deal Room (DDR) is a centralized repository for these materials that tracks versions, updates, revisions and permissions. It is the perfect companion to the digital sales cycle.



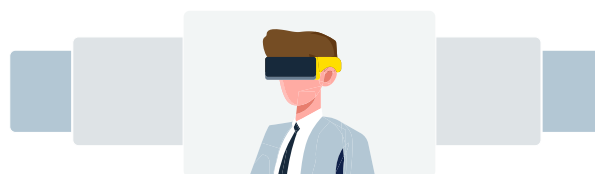
More Futuristic

If you think the above are interesting advances in digital selling, consider the following, more futuristic developments:

The Virtual Executive Briefing Center

A long venerated tradition of enterprise selling is the “headquarters visit.” In a headquarters visit, customers are flown to a vendor’s HQ and hosted in style—regaled with the best the vendor has to offer. These visits are often hosted in a formal Executive Briefing Center, where the customer is brought “behind the curtain” on upcoming products or programs, introduced to executive management, and invited to provide feedback and advice. Microsoft, Citrix, 3M and many others maintain executive briefing centers around the world for this very purpose.

Could this happen in a more digital way? And if so, what would that look like? A mere video conference may not get the job done, but what about an immersive virtual reality experience?



Consider the role-playing game, where the player navigates a virtual world using a mouse and a monitor. In a virtual world, HQ visitors could “teleport” into a virtual EBC, hosted by a tour guide. They could tour the HQ, meet various executives, learn about past accomplishments (3M’s EBCs are veritable museums of innovation), and be introduced to future roadmap items (Microsoft’s EBC includes the “smart home of the future”).

Client Entertainment

Another ritual of field selling is the ability to take a customer out for dinner and a night of entertainment. Companies sponsor box seats at arenas, salespeople sponsor elegant dinners, etc.

The purpose of this entertainment is twofold: 1) It's a way to reward customers for spending time with us and to encourage them to do more of that. This is a perk of engaging with salespeople, and a perk of being in sales. Sometimes the experiences sponsored in this context are once-in-a-lifetime, like spending time in the Oracle-sponsored hospitality suite at the America's Cup, or spending time in a XANT-sponsored VIP chalet at the Masters. 2) It's a way to spend time with customers away from office politics and office customs. When salespeople and buyers shed their respective roles and interact as people, they are able to connect in ways not possible in an office setting. The topic might turn to family or hobbies. Friendships and loyalties develop that may prove beneficial later during negotiations or difficulties in a sales cycle.

The benefits of in-person client entertainment are impossible to match through digital alternatives. Even more than the conference room, these opportunities are highly dependent on being in person. That said, some innovations have happened here too—of necessity—some of which will surely survive the 2020 / 2021 Pandemic reality. Creative entertainers, celebrities, and entrepreneurs have invited us to experience unique and intimate virtual experiences like we have not seen before. Sales teams have taken advantage of this to do things as unique as:



- Cooking night with a celebrity chef. Ingredients are shipped to your home, and you get live instruction as you assemble your meal
- Virtual wine tasting with a sommelier. Again, wines and cheeses shipped to you, and an expert sommelier gives you the queen's tour
- Virtual, small-format concert with a celebrity musician or comedian, including live chat before, after, or during the numbers
- Virtual magic show—magicians have figured out how to wow virtual audience with "mentalist" tricks ("I can guess what you are thinking")

In September of 2020, Amazon launched a whole platform around this concept called [Amazon Explore](#). Using this platform, sales teams can host customers for unique tours, hosted by local experts. These might include a personal tour of a cathedral in Barcelona, the canals of Venice, a marketplace in Istanbul, or the sushi markets of Tokyo.

Virtual entertainment possibilities have proliferated over the past year, and they greatly expand the entertainment repertoire of the Digital Field Rep.

The Digital Field Rep of the Future

There has never been a more exciting time to be a field rep. That may sound counterintuitive since everything about the world of field selling has been disrupted. But disruption spawns innovation, and innovation creates opportunity. Innovators have stepped forward, and we are seeing a whole new era of Digital Field Selling. The future here is so bright that leaders will never look back.

The Digital Field Rep has the opportunity to run her business like a franchise—with all the tools and visibility she needs to meet and exceed expectations. Her ability to interact digitally speeds her up, and her access to numbers—gauges, dials, charts, heads-up displays—allows her to monitor and manage her territory similar to how she would play an online game, drawing on resources each time she needs them.

As a buying and selling ecosystem, we have never been more equipped to support the Digital Field Rep, and the future is hers.

Rock on!

Dave Boyce

Chris Harrington

