

What's Preventing You From **Making** The **Most** of Your **Sales** Engagement Platform



Benjamin McWilliams

Curtis Ropp

Alexander Shyshko

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INTRODUCTION

Since the wide introduction of sales automation in 2017, Outbound Funnel agency has worked alongside revenue and operation leaders to help their sales teams win and retain customers.

No matter the size, economic environment, or complexity of their organizations, our clients demand the same ROI from their investment in sales technology as from the performance of their sales team. Leaders today expect their sales technology to:

- Streamline and help to create more repeatable sales processes.
- Empower each sales representative to amplify their productivity via automation.
- Improve communication workflow internally and with customers.
- Improve customer data across platforms.
- Deliver actionable insights and better reporting attributes.

We see many companies that are able to reach these goals. Unfortunately, we also see many who underutilize their tools and, in turn, limit their teams by denying them access to the full power of the sales solutions they've already paid for.

To help you avoid common pitfalls that often occur after onboarding your team to a Sales Engagement Platform (SEP), we've identified seven counterproductive trends and the practices you can employ to supercharge your company's growth.



Avoid the following trends to drastically reduce time-to-value

for customers and enable your teams to increase process

Efficiency, your systems to operate more **Effectively**, and

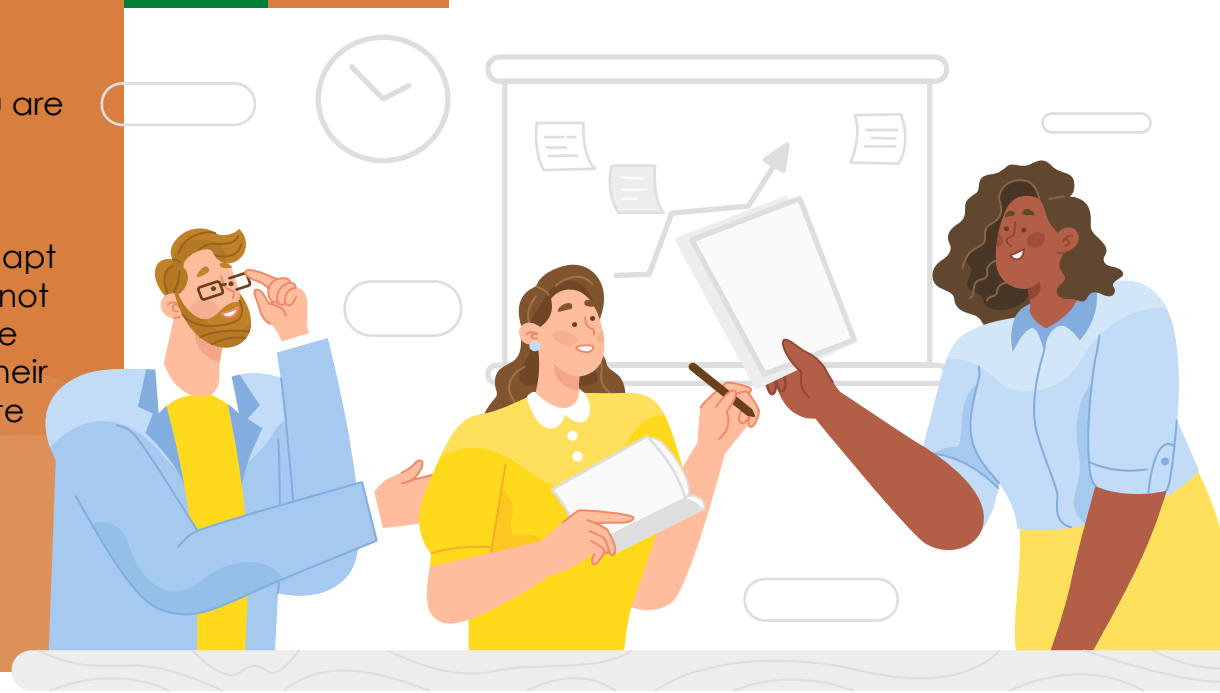
Empower your team to outperform competition.

01

SET IT & FORGET IT MENTALITY

Buying sales automation tools does not mean you are buying a solution to put it on auto-drive!

The market is dynamic, and your tools need to adapt to keep up. If the tools you use are left static and not improved constantly, you're leaving money on the table. It's not uncommon for teams to write out their sales process and content once and never update them again, or worse, never analyze them to see what's performing well and what isn't.



In a progressively competitive business landscape, outselling competitors requires agility and continuous evolution to keep up with market changes.

Organizations need to be committed to consistent improvement by enhancing product knowledge of the tools they're using. Those that get ahead are those who constantly adapt their tech strategy to the sales process that works in their environment.

It's easy to get comfortable, but past success does not ensure future improvement without optimization and revenue goals are always increasing.



Takeaways

- Automation will not save you from improper configuration.
 - The domino effect of misguided cross-platform strategy and overly complicated processes lead to improper configuration and low adoption.

- Have a strategic plan that considers long-term implications.
 - Just as your sales process and competition shift, your teams and technology must also adapt.

- Continuous optimization is key.
 - Having a dedicated Admin that can monitor, manage, and make changes at the speed of your go-to-market needs ensures your workflows stay current and effective.

02

UNDERUTILIZATION

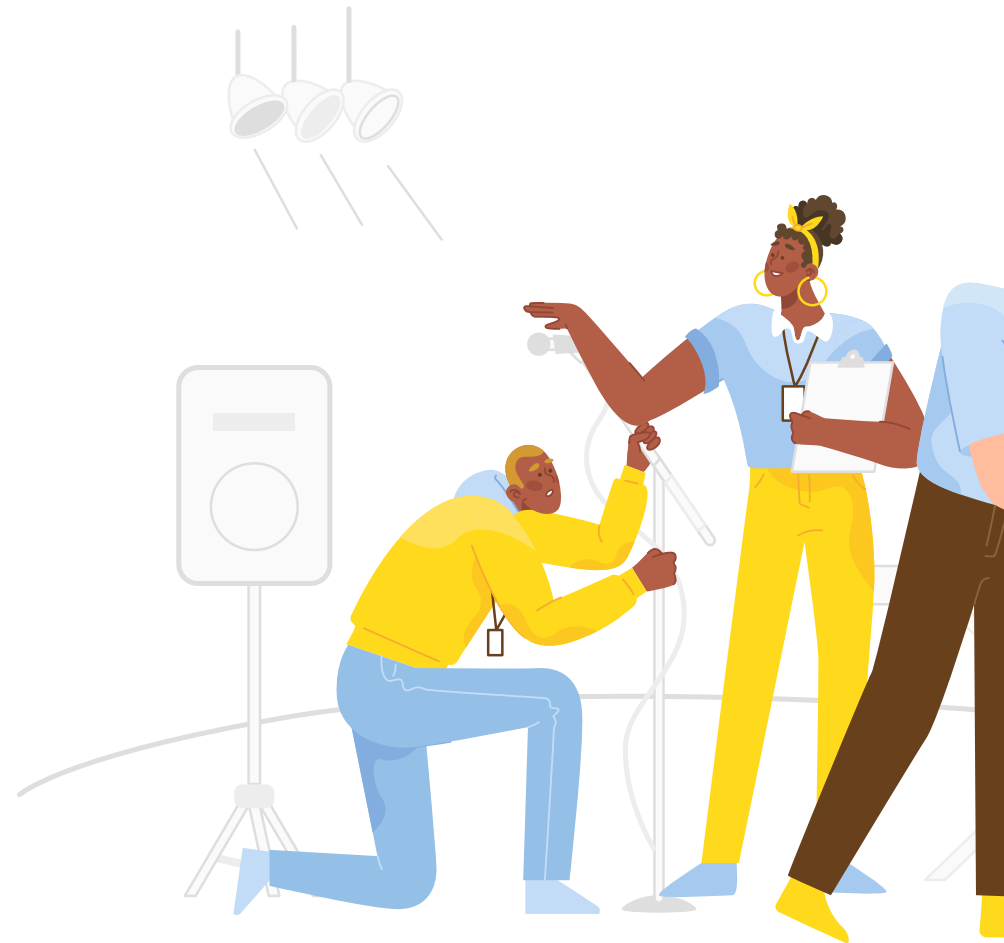
Picture this

You've purchased your desired sales application after rigorous vetting, IT approvals, budget fights, and negotiating like you're the next Chris Voss. The vision of what's possible is in focus. Everyone is excited for the kick-off call.

However, after initial onboarding is completed, you start to see retraction. Commonly, this is the result of missed training hours, management misalignment on the tool's use, or skipping steps in building workflows to seek out quick wins. It's a recipe that develops bad habits, adds unnecessary steps to the sales process, and fails to unlock the tool's full potential to help you meet your sales goals.

The same goes for management teams that may be quick to blame a new sales application as the source of the problem, when in most cases the issue is a failure to align expectations and training timelines with desired outcomes. Now, the same solution that the team raved about is being under-used and effectively abandoned by management, other than to report top line metrics that justify its purchase.

This is not an anomaly. [In fact, only 20% of respondents in a recent Korn Ferry research study indicated that their sellers have sufficiently adopted the sales technologies they've deployed.](#) 80% of them failed to utilize it for acquired capacity.



Many organizations start with the right mindset of adopting a new tool to enhance their sales process. Through proper enablement, teams should be able to find ways to not only amplify their team's desired output, but also to capitalize on the new technical functionality and features that tool provides to make their sales process even better! their sales process even better!

Takeaways

- Create functional playbooks that outline daily processes to help sales reps save time.
 - Some of our clients are surprised that even after years of using certain sales engagement tools, their reps weren't aware, for example, how Inbox integration can save minutes to hours of their day— everyday!
- Set up periodic (re)training for Admins and Sales Ops to ensure they are current on the latest use cases of your platform.
 - Without the input and awareness of your team, you risk missing opportunities to conserve weeks of resources and drive incremental value across multiple teams.

- Create feedback loops between end-users and leaders.
 - Collective learning that documents wins/gaps found in workflows helps identify opportunities to adapt the application in even more purposeful ways, empowering management to make necessary changes.
- Update your new hire onboarding material to keep knowledge cohesion across all teams.
 - Leaders need to be especially trained on reporting, data flow, and platform functionality so they can incorporate these strengths into their process road maps to maximize return on investment.



03

LACK OF TOOL COHESION

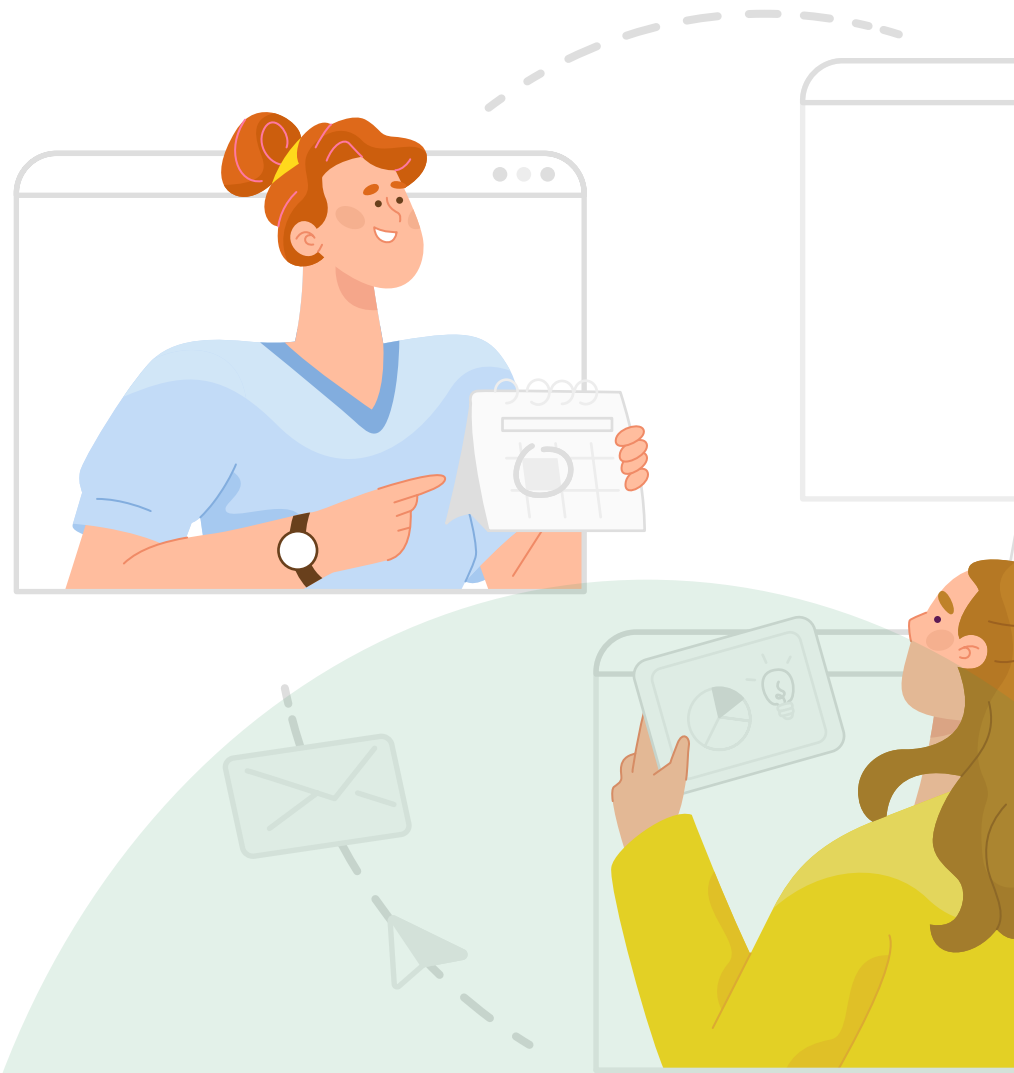
When tools are not properly integrated, it can lead to one or all of the following issues:

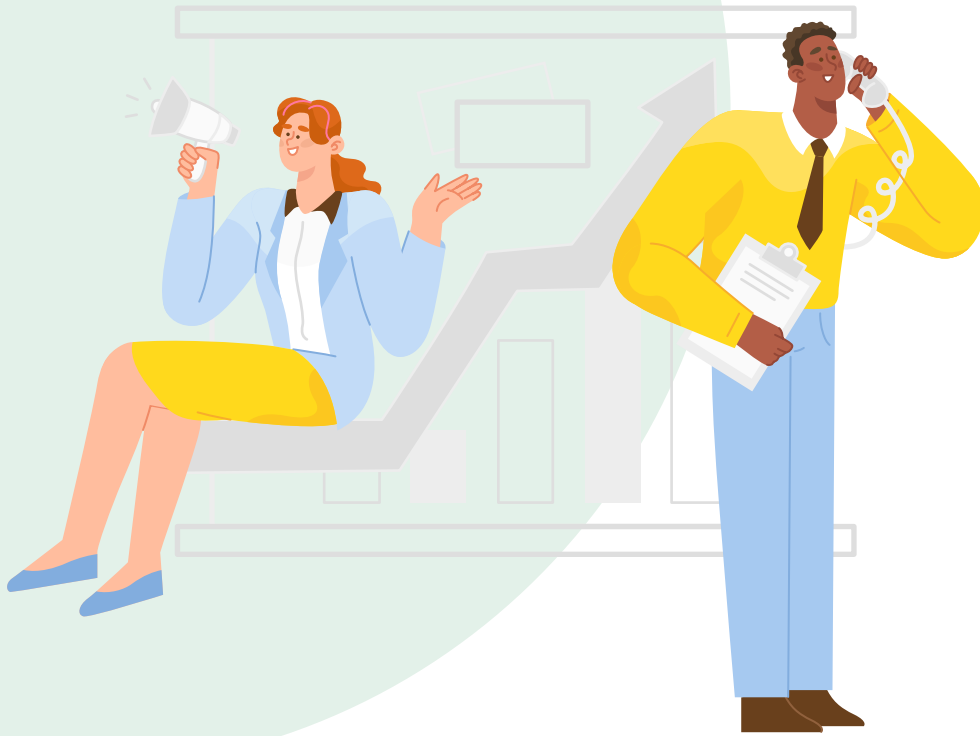
- Data is siloed. This means communication and collaboration is partial, intermittent, fragmented, or in some cases impossible.
- Team members have limited or no access to critical activity information.
- Managers miss out on cross-platform insights and learnings.
- Outdated information can be passed on from one system to the next, polluting even the best data hygiene plans.

No wonder sellers [only spend 30% of their time actually selling](#) and the rest of their time managing the set of applications they were given to communicate with their internal teams and external customers.

Often, organizations will launch a new tool and then copy and paste all the information from their old platform into the new one. Some may even use the two platforms independently.

This can lead to outdated data, siloed systems, and missed opportunities for teams to act on information that could be critical for business customer resolution, or sales opportunities.





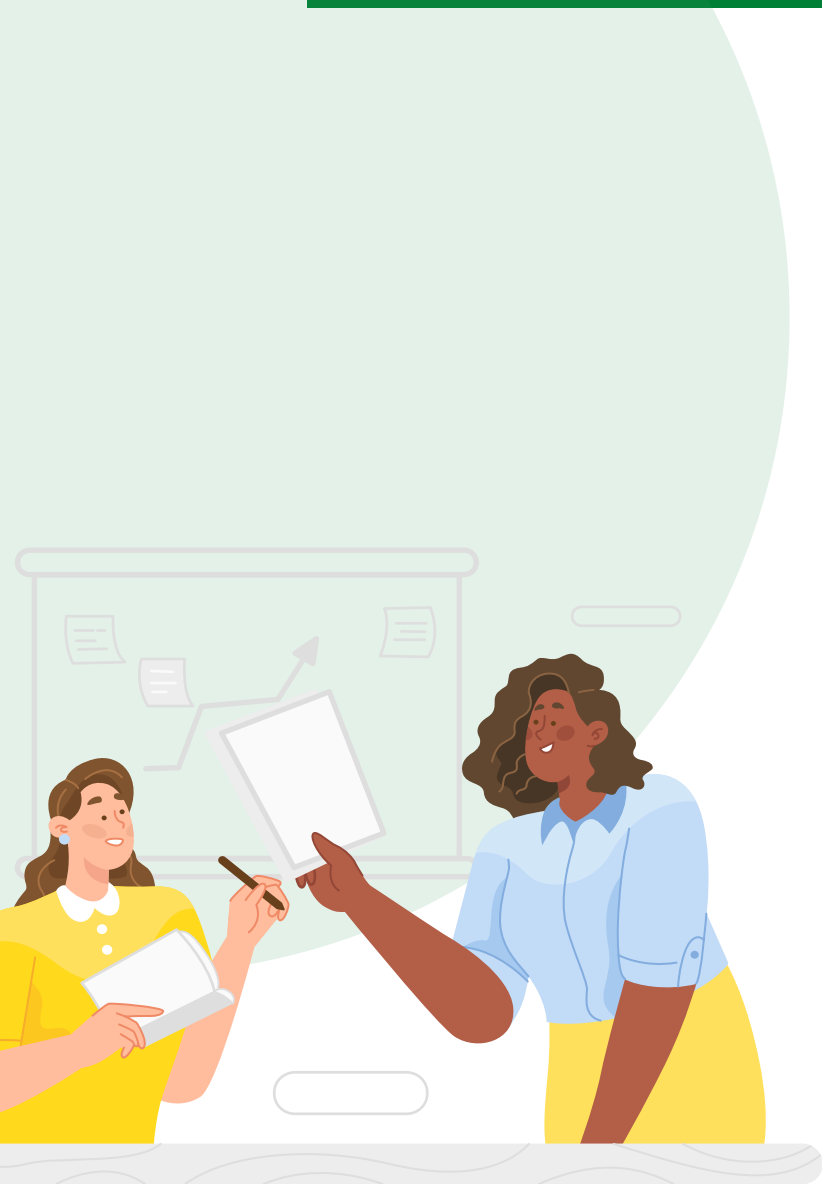
Takeaways

- Tool cohesion ties your existing tools together to reduce or eliminate manual entry of data and improve transfer of data between systems.
- Suboptimal configuration with CRM is a common missed integration opportunity that leads to platform underperformance.
- Create a data flow procedure to analyze your process flow with cross-functional teams and optimize use of your Sales Engagement Platform across the organization.

Fully integrating your sales tech stack allows you to use all tools to augment each other, and makes training significantly easier. Features tend to multiply when you start combining tools. But, with real-time omni-platform integration, leadership can have a single source of information to make decisions.

04

SINGLE DEPARTMENT ADOPTION



Apart from CRM, it's atypical for a tool to be used across multiple departments.

Sales Engagement Platforms uniquely offer a similar, cross-departmental advantage but are often overlooked as some of the core communication components may look similar to marketing automation tools.

This is primarily because marketing automation, by design, is meant for one-to-many communications and is typically run exclusively by the Marketing Ops and Marketing teams.

Sales tools on the other hand, while they may require collaborative effort from sales, revops, and marketing teams - are designed to be used and run by a single end-user that can communicate to their audience in one-to-many and/or ideally in one-to-one engagement.

Not surprisingly, most sales engagement and automation tools are becoming a staple solution in Sales Development teams!

Many organizations will buy a sales automation tool for one department to address a single problem, when that same tool could be used across sales cycles and throughout the desired customer journey.

Here are few practical use cases on how Sales Engagement Platforms, unlike any other tool, can impact revenue and business growth across very different business functions:

Renewal Teams

Account management, automation of sales cycle, cross pollination with Customer Success and/or Account Executive teams for past activity insight and messaging to tailor their

Customer Success

Nurturing key contacts, automating proactive outreach to contacts that may require ongoing education, preparing for QBRs, or updating product communications.

Account Executives

Ability to execute their sales process through a systematic approach to communications, account nurturing, self-driven outbound/inbound selling activities, and time savings found in inbox and CRM data population.

HR, Recruiting, Support, Product or Engineering

Opportunities to automate response time, talent recruiting processes, follow-up practices, and improve communications. Sales Engagement Platforms are underutilized in these departments yet can drive significant efficiency when applied to eliminate time wasted on manual or repetitive tasks.





World-class sales organizations are focused on a seamless and continuous approach, which supports the customer's increasingly complex path. The move is away from siloed approaches where marketing owns the awareness piece, sales owns the buying process, and customer service (or customer success) owns the post-sales responsibilities.

Getting buy-in on a new tool across departments not only ensures your organization is optimizing the value of the tool, but it also can save money that otherwise would have been wasted on multiple tools, each requiring its own technical administration, support staff, and training.

In instances where resources are low, external RevOps Admin can be contracted to optimize, maintain, and support organizational readiness in the interim of assigning internal resources to support.

Takeaways

- Sales Engagement Platforms are a staple of Sales Development teams, but also have impactful use cases for other business functions
- Sales Engagement Platforms can be managed externally, independent of any single internal organization, to ensure cohesive operations across teams

05

DATA

INTEGRITY

Sales Engagement Platforms that are only partially integrated or are kept isolated from other systems-of-record, can lead to bad data. Nothing frustrates a team more than wasting time using outdated information.

According to a report by KPMG, 92% of senior executives have the same concern.

For example, if your team is calling a wrong number or emailing a bad email address, it's not only wasting their time, but it can also impact your spam score which in turn can negatively impact delivery rates, and in the worst cases your domain reputation.

You want to ensure your teams are always looking at the most current data, and that the same information is current and consistent across every system. Establishing a full stack strategy across all tools to determine what data repository is the system-of-record, and what data is ancillary, is a first step in ensuring data integrity practice.

Takeaways

- Work hand-in-hand with your Sales and/or Revenue Operations and CRM Admin teams, ofet and early.
 - Organizations need to take data integrity seriously and be precise when handling integrations across systems. Taking on this task as a united front with IT will carry a higher impact on your campaigns with more accurate,

- Eliminate wasted effort and frustration by ensuring data integrity across all platforms.

- Create Data Hygiene practices

Working with our clients we typically go through the following steps to identify the gaps or areas of improvement

 - Duplication found within sales/martech tools
 - Data cleanup within core systems of records
 - Timeline Data Age-out
 - Data vendor validation

06

ADMIN ABANDONMENT

When a single administrator sets up advanced features, automation, and integrations, organizations can be left helpless when that administrator leaves the company. Organizational memory is lost and the company can become mired in complex automation without the ability to manage or change it.

Teams and individual champions of change who've made the greatest investment in the sales systems have the most to lose from Admin abandonment when only a single person knows how to handle all the integrations and automations that are hyper-specific to your team.

Each configuration is incredibly unique and it is unrealistic to think an admin is easily replaced. Even for a highly trained expert it is challenging to quickly and fully understand all the facets of the previous Admin's configuration without a knowledge transfer.



“Companies that understand all employees are involved in sales performance are the ones that truly recognize the meaning of sales enablement.” - Gartner

Takeaways

- Document key processes, stakeholders, and review business continuity plans often.
 - Share knowledge of key system capabilities across multiple stakeholders including front-line end-users,
- Establish redundancies!
 - Designate a backup for every system expert and task them with reaching proficiency parity. This should be done including you business counterparts and non-technical experts; not solely relying on IT and Admins.

07

ACTIONABLE INSIGHTS & REPORTING

The reporting in many Sales Engagement Platforms can be customized to deliver insights needed by both managers and end-users, incorporating data from other tools to construct a robust picture of performance across sales teams and customer journeys.

Having your data in one centralized place, with ways to query information using relevant filters, allows you to analyze actionable data to make real-time performance-based decisions.

Reporting is often forgotten until it's needed, however, identifying the questions you need answers to is key to configuring the Sales Engagement Platform and customizing reports to deliver actionable insights.

Takeaways

- Metrics answer questions; approach reporting with curiosity and defined purpose.
 - Teams often rely on only a few out-of-the-box reports instead of digging deeper, asking questions, applying filters, and getting the insights they need to drive actions.

- Understand the full ecosystem of data available to you across platforms.
 - Many don't realize how robust the reporting can be from the different tools that are used in their company. Managers and end-users must better understand insights provided by various reports and how to

CONCLUSION

Sales tech applications can deliver an array of benefits that can positively impact revenue, however, automation will not save you from inadequate platform configuration, lacking cross-platform strategy, or inefficient process.

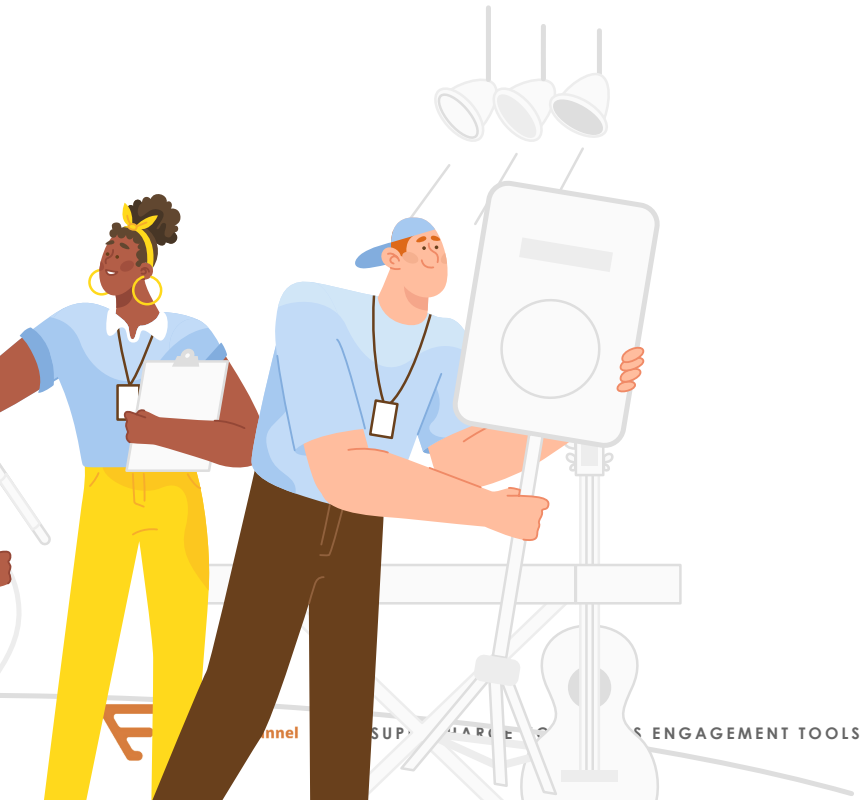
Underutilization of platforms stemming from missed training hours, management misalignment on use cases, or skipped steps in building workflows can be the death of what could be the key to supercharging growth.

An orchestrated integration between all of your sales and martech solutions, aligned to revenue teams and synched to protect data integrity - is key to the success of your tech stack which should be seen as a single cohesive tool and needs to be managed as such.

Rolling out new tools needs to be taken seriously and done strategically. With proper implementation, training, continuous monitoring, and optimization. Build these with redundancies in mind to future-proof your team's processes in line with your solution to deliver on goals, year-after-year.

When evaluating tools or seeking ways to improve current workflows, ensure those influencing the decisions are sufficiently knowledgeable about the capabilities of the tool(s) and which may be most suitable to your use cases.

Avoid the major pitfalls that can leave you stuck with tech that doesn't work hard enough to meet your needs, and if needed...you can always call us for help!



ABOUT OUTBOUND FUNNEL

Since 2018, Outbound Funnel has worked with over 700+ companies to drive higher efficiency in their processes and focus on more revenue-generating activities using Sales Engagement Platform.

As a strategic partner to CxO's, Sales and Marketing leaders, RevOps, SalesOps and Enablement teams - we model your customer experience journey for your sales engagement platform, cross-platform integrate your workflows, consolidate your sales tech to streamline communication channels and enable visibility across departments for leadership.

Our team's experience spans across Digital Sales Transformation technology, implementation, onboarding, and training for companies from 5 employees strong, to Fortune 500 large. Our proprietary training and system administration methods allowed us to drastically reduce time-to-value for customers, enabling teams to scale swiftly and efficiently.



[Schedule Consultation Call](#) to discuss your revenue team goals and how to optimize sales engagement platform performance to achieve them.