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8 WAYS MSPS CAN BENEFIT FROM IT

Industry-Specific Sales Tools

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How can your sales team close more (and larger) deals faster?

While there are many sales solutions on the market, most of those options are built to meet the general needs of the collective business community. These common systems can be quite inflexible and MSPs often end up realigning valuable processes and key priorities to make them work at the most basic level. The return on these investments is questionable at best.

However, sales software platforms designed specifically to meet the needs of an MSP business, with features such as customer relationship tracking, IT products catalogs, and customizable reporting, will provide tremendous value to organizations like yours. These industry specific tools allow you to focus more time and energy on your business and clients and help your team dial into their target audience to close larger deals in a shorter period of time.

Sales platforms built exclusively for MSPs will boost employee productivity and company profitability and put your firm in a more competitive position. In a quest to increase MRR (Monthly Recurring Revenue), IT services firms need tools with features that help allow their teams to assess opportunities, carry out effective sales activities, and close new deals.

In this eBook, you will learn how an industry-specific solution can help MSPs reduce sales timetables and increase margins and pocket share. Here are nine of the top ways that your firm can benefit from an industry-specific sales tool.



1 Retain all sales-related information in ONE place

MSPs' sales teams require a broad range of tools to move leads from prospect status to signed contracts. Not every system addresses the unique needs of the IT industry. The biggest issue IT services firms have to deal with is the workflow limitations resulting from a lack of integration points between the tools MSPs use every day, especially those tailored specifically for IT services businesses.

Automation saves businesses time and money and reduces frustration and costly data entry mistakes. Properly integrated platforms allow information users enter in one system to flow seamlessly in others. Those applications may use the incoming data to automatically take certain actions, eliminating manual steps, errors, and wasted time and expenses.

Some of the technologies typically found in an MSP's toolset include:

- ▼ Customer Relationship Management (CRM) platforms
- ▼ Marketing automation software
- ▼ Email solutions
- ▼ Professional Services Automation (PSA) platforms
- ▼ Sales assessment tools
- ▼ Quotation and proposal builders

Using multiple applications for different processes disrupt information flow. For example, many MSPs use marketing automation software to manage their leads and a sales assessment solution and PSA platform to record wins. Since these systems operate as silos, there is no free flow of information between systems, so employees have to enter the same data multiple times to ensure everything works properly. MSPs can eliminate those bottlenecks with a full-featured sales platform that integrates with their other business tools.

A smooth flow of information is vital so that your sales team has instant access to all the latest data related to each lead. Recent research by Forrester reports that properly integrated sales software could yield a 245% ROI.

An MSP-specific sales software solution centralizes all the functions you need, including CRM, PSA, email, sales assessment, and proposal building. These unified systems allow providers to track opportunities, proposals, quotes, and invoices without having to go back and forth between various tools and applications.

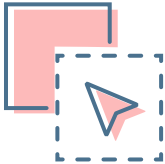
2 Reuse existing information for quotes and proposals



Building a sales proposal from scratch for every new prospect and deal can be a painful ordeal. When your sales team is asked to send proposals quickly, they tend to make mistakes, resulting in a shoddy pitch that negatively affects the opportunity and your brand.

As an MSP, you likely know that, on average, it requires approximately two hours to create a sales proposal using a Word document. One way to speed up that process is to use a sales quoting tool with pre-built templates that let your team easily replicate proposals for similar types of opportunities. No need to create completely new documents over and over again. These sales-enablement solutions can trim the time required to create effective sales proposals to as little as twenty-two minutes – an 82% improvement. If you multiply ninety-eight minutes by the number of proposals your team submits each year, the savings in time and payroll, and increase in productivity could be quite substantial.

A **smart** quoting tool **saves MSPs time**, allowing you to:



Create quotes and proposals using a drag-and-drop option

Conventional quoting methods such as using Word, Google Docs, and PDFs create many challenges for everyone (i.e., sales team members, prospects, and others) in terms of editing, aligning, and sharing information. A modern automated quote builder allows you to easily overcome all those obstacles. For example, drag and drop blocks that any member of the sales team can save and reuse for other deals can eliminate a lot of headaches and wasted time.



Present an interactive quoting experience clients

Selecting sales software that supports inline comments and conversations allows you to answer client queries from within the quote. Some of these tools even provide an option where the MSP's clients can select preferences and the system will automatically recalculate the proposal based on those choices.



Know when sales prospects interact with your quote

Some systems can be configured to provide real-time notifications when decision makers and influencers view, comment, accept, make payments, or otherwise engage with your proposals.



Electronically sign quotes and proposals

The ability to share legally accepted electronic versions of these documents is a huge benefit. These features help MSPs to ensure their clients can sign, accept, and make payments online, an especially important option for those who work remotely. Another key function is the ability to set expiration dates and reminders within electronic quotes and proposals to increase urgency with sales prospects.

3 Leverage workflows to gain more time to sell



In a recent survey, over 40% of workers reported spending at least a quarter of their work week on manual, repetitive tasks. Much of that time involves email and data collection and entry-related activities.

An MSP-focused sales automation tool allows providers to create consistent, repeatable, and scalable sales processes and tailor them to meet their continually changing needs. Setting up these types of management workflows can free you from mundane daily activities such as:

- ▀ Assigning tasks to members of the sales team
- ▀ Monitoring progress on a wide range of projects
- ▀ Sending email reminders
- ▀ Identifying superstar performers on your team
- ▀ Exposing hidden or easily overlooked bottlenecks in the sales process
- ▀ Providing at-a-glance oversight for managers and supervisors



4 Reusable email templates

An MSP sales automation tool connects and works closely with your company's email system and allows team members to send personalized or bulk messages to your clients and prospects.

The ability to track key metrics such as email open rates and link clicks is a crucial feature of MSP-specific sales tools. With insight into all their lead-related activities, sales teams can better manage their opportunities and close deals much quicker.

A salesperson can compose and save a message as a template, and then reuse that text and links whenever a similar situation or opportunity arises. This feature also helps MSPs develop and improve the results of follow-up email campaigns.



5 Real-time access to global IT product databases

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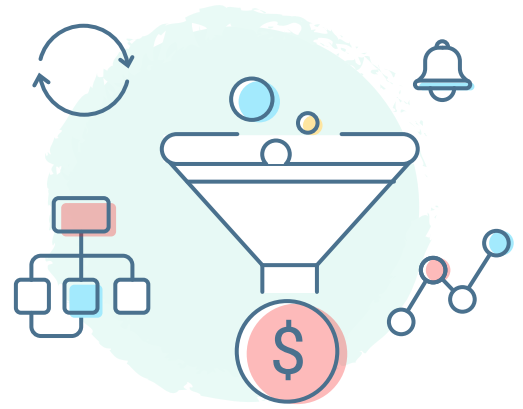
Built-in integrations with product catalogs like Etilize and IT distributors such as Ingram Micro, D&H, SYNEX, and Tech Data allow MSPs to import items and retrieve real-time pricing directly from each source.

Instant information on procurement costs and availability make it easier for MSPs to close sales and quickly order hardware and software. These features increase the accuracy of quotes and ensure your pricing is competitive, an extremely helpful option if your firm specializes in bid-heavy industries such as legal, financial, government, and healthcare.



6 Manage your people and projects in one system

Syncing accounts from major PSAs such as Autotask and ConnectWise lets you receive and push tickets directly from MSP-oriented sales software. A two-way integration helps ensure that vendors, contractors, and clients are all on the same page at all times. That means any new products added to your PSA will automatically be available to use in quotes and proposals and populate your catalogs, providing more accurate information for your agreements and billing.



7. 360-degree lead visibility

According to Harvard Business Review, companies that encourage and train team members to manage their sales pipelines can improve their revenue growth by 9%.

A sales tool that provides a visual pipeline helps MSPs with both their micro and macro focuses. You can get as granular into the information as needed for every deal and get the big picture overview of the flow in your sales funnel.

Pipelines are typically represented by boards that show all the various stages of leads—engaged, prospecting, won, or lost.

These systems should be configurable and have the ability to notify your sales team when each stage of a project is complete, another is about to begin, or prompt team members to reschedule or initiate the next process. Users must have insight to all ongoing activities and interactions with sales prospects and clients.



8. Visualize data and take critical decisions

When synching sales tools, all prospect data must update and be secured in a central repository. Sales teams can create a variety of reports using this information to gain greater insight into their collective and individual activities, as well as the related results.

Zomentum— the sales automation tool created exclusively for MSPs

Purpose-built for MSPs, Zomentum provides IT services providers with a unified sales platform combining all the essential features mentioned above to address their unique needs and manage all related processes. This invaluable business tool captures your collective sales flow and provides team members with a wealth of tools to track results, collaborate, communicate, and close more leads.

Interested in learning more about the sales power of Zomentum?

[**Contact our team today to arrange a demo.**](#)



Everything you need to boost the efficiency of the sales process

- ▼ Opportunity management
- ▼ Built-in CRM
- ▼ Sales automation
- ▼ Detailed quoting capabilities
- ▼ Powerful proposal builder with branding
- ▼ Out-of-the-box integrations with PSA platforms and distributor catalogs
- ▼ User friendly pricing

Get Started Now