



WHAT IS SALES AUTOMATION?

**THE ULTIMATE GUIDE TO THE
BENEFITS OF AUTOMATING
THE SALES PROCESS**



A hand holding a tablet displaying a 3D bar chart and a line graph with an upward arrow, symbolizing business growth and data analysis. The chart features multiple bars in various colors (red, green, blue, orange) and a line graph with white dots connected by a line. A large, glowing orange arrow points upwards and to the right, indicating a positive trend. The background is dark, and the overall image conveys a sense of modern technology and data-driven decision-making.

WHAT IS SALES AUTOMATION?

Sales automation refers to using automation tools to complete manual tasks related to sales. These automated tools will focus on routine, predictable tasks.

Some common examples include sending invoices, qualifying prospects, sending follow-up emails, and answering customer questions.

The important thing about the various tasks that you complete with **sales automation tools** is that they tend to occur frequently. That may be monthly, but it is frequently weekly or even daily, regularly multiple times each day.

The goal of sales automation is to free up the time that your team would spend on these boring administrative tasks. It may even prevent the need to hire another person to perform these tasks.



Sales Automation Does NOT Replace Your Sales Team

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It is very important to highlight that **CRM and sales automation** do not replace your sales team. You should think of them as digital assistants there to reduce their stress. Your sales team can “delegate” some of its responsibilities to your automation tool.

Remember that your team will still be handling the processes later in the **sales prospecting funnel**. They will also be needed for other things, such as generating **creative sales outreach ideas**.

Benefits of Sales Automation

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We already mentioned some of the benefits of using a **sales automation platform**, but it's worth going into them in more detail. This will help you understand why so many businesses use automation for their sales and why those that don't should consider it.

Sales Automation Lets Your Team Focus on the Most Important Tasks

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One of the biggest advantages of sales automation is that it frees up your team's time. Every single task that the software does frees up at least a few minutes of your team's time, if not a few hours or days, especially when scaled up.

This leaves your team more time to focus on other tasks. For example, instead of having to generate leads and then follow up with them, they can use **automated lead generation software**. Taking it further, if you use an automation system that knows **how to write outreach emails**, your team can focus on interactions later in the sales funnel when people are more likely to convert.





Automating the Sales Process Reduces Your Labor Costs Due to Efficiency

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By freeing up your team's time, you will save money on labor costs. Even if your team is salaried instead of paid hourly, you may find yourself having to hire fewer people.

The more specialized your sales team is, the more important this benefit is. After all, you want them to be able to use the skills and specialties you hired them for, not force them to do tedious tasks.

To get an idea of how much of a difference this can make, consider the statistics that sales automation increases efficiency by 10 to 15%.

Streamline and Improve the Sales Pipeline

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One of the specific areas that automation tools can help significantly with is the sales pipeline. Using automation can help with **filling the sales pipeline** with more prospects. After all, it is easy to automate the collection of email addresses and send personalized emails or messages on LinkedIn.



Don't Miss Any Sales Prospects

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Using **sales prospecting tools** can dramatically increase the number of prospects you find, preventing missed opportunities. The automation also ensures you remember to follow up with each of those prospects. From **cold emails that get responses** to more advanced **sales email automation**, automation can ensure you reach out to every single one of your prospects. That way, your **lead prospecting** efforts don't go to waste.

Get Valuable Data

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The **best sales management software** gives you access to valuable data. It will collect data on prospects, leads, the sales funnel, messages sent, and more as it works. You can then use this data to make important decisions and even to evaluate the success of the automation.

And with the **best sales automation software**, this data will be available throughout your company. It can let decision-makers make more informed decisions. It can help individual members of your team improve their level of customer service by teaching them about their leads.

Improve Customer Satisfaction

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When you **create an automated sales funnel** and set it up properly, you can deliver a better customer experience. That is because prospects will receive quicker responses to their questions from the automated system.

Additionally, the fact that your team no longer has to spend time on the now-automated tasks gives them more time to deliver a higher quality of customer service to your prospects.

Reduce Human Error



As with when you automate anything, **outreach sales automation** also reduces the risk of human error. Everyone makes mistakes, but some are harder to correct than others. Additionally, human error tends to occur more frequently with tedious tasks, such as those that you can easily automate.

When most people think of human error, they picture something like a typo or clicking on the wrong category. But humans can also make mistakes when it comes to following procedures.

Once you set it up properly, automated tools are more likely to follow the **sales prospecting best practices** without slip-ups than humans.



Onboarding Becomes Easier



You can think about the benefits of **automation tools for small businesses** when onboarding new employees. If you use automation, you will have fewer things to teach the new team members. Instead of focusing on learning administrative tasks, your new employees can focus on learning about your company and products or services.



Benchmark and Track Progress



Your automation software can track crucial KPIs and other data, such as qualified leads. In addition to guiding decisions, you can use those analytics to measure your success. You can further use the data to track growth and set goals.

This will let you confirm that your investment in sales automation is well worth it.

Automating Sales Lets You Scale Up



Because of its efficiency, using sales automation software will also let you scale up your efforts with ease. Since you don't have to manually respond to more emails or qualify more prospects, you can easily increase the number of each.

You won't necessarily have to hire more staff to handle these automated functions on the sales funnel. Instead, you will just need to hire more people for other sales interactions, reducing the cost of growth.

Convert More Leads



The bottom line is that sales automation lets you turn more leads into sales. This comes from several of the above benefits, including the ability to scale up, the ability to personalize, and the ability to work more efficiently, among others.

Cautions When Using Sales Automation

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While sales automation is a good thing for most businesses, this will depend entirely on how you use it. You need to be careful to ensure your interactions have a human touch and that you aren't spamming your prospects with unwanted emails and messages.



*Alfred makes it easy to follow best practices with automation thanks to built-in limits that are under **LinkedIn's daily limits**. You have the ability to adjust these, but we suggest staying within the recommended limits to avoid having your account flagged or annoying prospects.*

COMMON WAYS YOU CAN USE SALES AUTOMATION TOOLS

Every automation software will be slightly different, but there are common sales-related tasks that you will likely want to automate. From **automated sales prospecting to B2B sales management**, the following are some of the ways you may want to put your automation tools to good use.



Prospecting with Sales Automation

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Once you understand the **difference between prospect and lead**, you will have to turn qualified leads into prospects. Automation can help with the prospecting part of this, as well as the lead generation portion.

You may not realize how good automation tools can be at **B2B prospecting strategies**, but they are very useful for this. That is especially true when you use the best practices for **how to write a good prospecting email**. For example, use your **sales email automation software** to personalize templates.

You can set up your lead prospecting to use a slightly different template based on the event that triggers the email. For example, RSVPing to an event can trigger one template.

Alfred makes it incredibly easy to personalize your email templates. The system already gathers data such as name and company name from LinkedIn when it generates leads. But you can also use your imported .csv files for additional personalization. Alfred turns each additional column into further personalization.

Creating New Records

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The natural result of using automation for prospecting is that your system will also create new records automatically. You can set up several ways of creating new records of leads or prospects. Some can come from scraping LinkedIn, while others come from contact forms on your website or from uploading a business card.

Lead Scoring

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For leads to become prospects, you need to qualify them. You can manually go through a **lead qualification checklist**, but the **top sales prospecting tools** make this much easier.

Many tools will include features to help you score leads. This way, your team knows where to concentrate your efforts.

Some tools will assign the qualified leads to the appropriate sales rep. That can save you the time spent trying to find a good fit or create an even workload among your team.

Data Collection

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One of the most important uses of a **sales automation solution** is to collect data. We already touched on this when mentioning data collection as a benefit of this software.

But take a moment to think about the extent of the benefit. Imagine adding new leads to your CRM manually. Then, compare that to setting up your **best sales lead software** to run while you are working on something else.

The best **sales lead database software** will make it simple to import and export leads.



*Alfred features a built-in **LinkedIn CRM**, letting you export data such as phone numbers and emails from LinkedIn with ease. All lead data can be easily exported in a .csv format. Alfred also lets you import .csv files to add leads to those scraped by the system.*

Reporting



The natural extension of collecting data is generating reports on it. Creating reports can involve a lot of manual analytics and be time-consuming. But the best **business prospecting tools** will include reporting.

Alfred includes analytics and performance tracking for your efforts on LinkedIn. Use the analytics to confirm that your outreach is effective or decide which strategies to focus your efforts on.

Automate the Workflow



You can take advantage of **sales workflow automation** to create a streamlined process that is lean and clear. Having a well-organized workflow will help your automation tools deliver results, as well as make it easier for your team to stay on track. It also makes it much easier to confirm what stage of the sales funnel a prospect is on or which team member was assigned a specific lead or task.

Data Entry and Personalization

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Data entry is another task that can be automated, especially when your automation tool is connected to your CRM or lets you import spreadsheets. For example, you can have the system enter a name or a price automatically.

The personalization we already mentioned is just one example of this type of data entry. In either case, you import a spreadsheet or use the data in the system, having it automatically populate relevant fields. Whether that is in a spreadsheet filled with data, a form, or an email you are personalizing, the overall idea is the same.

Sales Email Automation

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One of the most time-consuming parts of sales that you can automate is sending emails. Once you know **how to write a cold email** or gather your **cold email tips**, you can turn them into a template. From there, let your **automated sales funnel** send emails for you at set intervals.

This will ensure you never forget to send an important email. It will also streamline the process of writing them via a combination of templates and personalization.

Alfred has a template library with hundreds of templates to choose from, each of which allows for customization. You can also create your own template.

For example, you could use the following for a first-contact email:

“Hi, this is [Name] from [Company]. I saw you are interested in [Group/Topic]. I’d love to discuss [Topic].”

Or a follow-up message could say something like:

“Hi, this is a follow-up to see if you enjoyed the article I shared on [Topic].”

You can set up your email automation to stop the sequence if the recipient takes a certain action, such as responding to the CTA.

*Alfred lets you take email sequences to the next level with an **omni channel sales strategy**. Start the conversation on LinkedIn and then move it to email or a Twitter DM. Then, move it back between the other channels as many times as you want. This way, you can reach your prospects on their preferred platform while increasing the number of touchpoints.*

Pipeline Management



You can use automation as part of **how to manage your sales pipeline**. Best of all, using automation for **building a sales pipeline** reduces the risk of human error and ensures that you will follow **sales pipeline management best practices**.

This extends to managing the sales funnel, from the awareness stage to the consideration stage to the decision stage.

Customer Service



We mentioned that one of the benefits of sales automation is the ability to improve customer service by responding quickly. You can do this by **building a sales strategy** that includes an automated FAQ answering system. Set up a chatbot or use another type of automated system to answer simple, common questions.

This will let clients reach out to you at any time and get a response.

Scheduling



Any sales strategy will require scheduling of some sort. Maybe you need to schedule a time to talk with a lead, or your team needs to meet. You can use automation to streamline the scheduling process. Some systems let you send your prospects a link and have them choose an appointment.

Social Media Scheduling



Scheduling can extend beyond appointments with leads. Any list of outreach tips will always include posting on social media, especially as part of a multi-channel sales strategy. But you don't want to have to sit down and write out a post and upload photos every time you post.

The best sales outreach tools will let you plan out your upcoming social media posts and then schedule them. This way, they post automatically without you having to log into the relevant account or upload anything at the moment.

*Alfred lets you schedule when you will make social media posts. This makes it easy to plan posts on LinkedIn and other platforms ahead of time, saving you time to work on other parts of your **outreach campaign**.*

Reminders for Other Tasks



Even the best **LinkedIn prospecting automation** can't do everything for you. But some systems will let you set up reminders or guidance to ensure your team performs other tasks. For example, Alfred can remind you to write and send an email that doesn't have a template.



Alfred's Greetings feature is a good example of something that other systems may set reminders for. Use this feature to automatically send personalized emails on birthdays, job anniversaries, when someone changes jobs, or if they endorse you on LinkedIn.

Contracts



Depending on the system you use, you can use templates for contracts and proposals just like you would for the **best email follow up and nurture sequences**. This is similar but on a larger scale, with many programs even letting you use important spreadsheets to customize elements of the contract.

Order Management (for eCommerce)



Depending on your industry, you may also want to look into sales automation tools that can handle order management. Not all businesses will need this, but it can save a lot of time if you sell physical products online.





Autodialing

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As mentioned, not every single step can be automated, at least not if you want to deliver a good customer experience and have high conversions. But you can add automation to more tasks than you may realize.

For example, you could have your team call prospects when they are in the **5 stages of sales**. You can automate the dialing process instead of making your team dial the number of the prospect each time they call. This may seem like a small time-saver, but it prevents misdials and lets your team work more efficiently. After all, while the number dials, they can review the information they have about the lead.

Even More Sales Tasks That Can Be Automated

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Although you won't necessarily be able to do everything with the same piece of software, there are many other sales-related tasks that you can automate. You can look for programs to automate:

- ✓ Forecasting
- ✓ Setting quotas
- ✓ Talent management
- ✓ Record creation
- ✓ Activity logging
- ✓ Send invoices and payment reminders
- ✓ And more

How to Choose Sales Automation Software

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With a better understanding of **sales enablement tools**, how do you choose which of the **best prospecting tools for sales** to use?

Look at What's Automated

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Start by thinking about what part of your **sales conversion strategy** you want to automate. Then, choose an automation tool that automates it.

At the very least, you should look for **top sales engagement platforms** that automate prospecting and sending messages. The best ones can set up multi-sequence message campaigns, whether in email, on LinkedIn, or somewhere else.



Look for Personalization of Messages

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Always make sure that your **sales tools for prospecting** let you personalize your messages. This lets you effectively use templates without hurting the customer experience.

Choose Something With Analytics

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You also want to make sure that your chosen automation tool includes analytics of some sort. Remember that data is one of the most important benefits of automation, and analytics lets you put that data to good use.

Check Integrations

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The **best sales prospecting software** will easily integrate with the other systems you use, no matter the type of software.

Alfred uses native integrations, webhooks, and Zapier for integrations with more than 3,000 applications and tools.



THE TAKEAWAY

Sales automation lets you and your team use your time as efficiently as possible. It handles the repetitive tasks, letting you focus on parts of your **sales strategy and operations** that can't be automated. When used properly, automation can boost your bottom line, increase sales, and give you valuable data.

You can use sales automation for nearly every part of the sales funnel, from generating leads to the **sales qualification process** to sending personalized emails. The best **sales prospecting automation** tools will also provide analytics to help you confirm the value of your automation and to better focus your efforts on the strategies that work the best.

Turn to Alfred for your automation needs. There are automation features to help you throughout the pipeline, from hundreds of templates that can be personalized to the ability to prospect on LinkedIn.

Get a demo from the Alfred team, and then sign up for a free trial, no credit card needed.