How to Automate Sales: MISTAKES TO AVOID with Sales Automation

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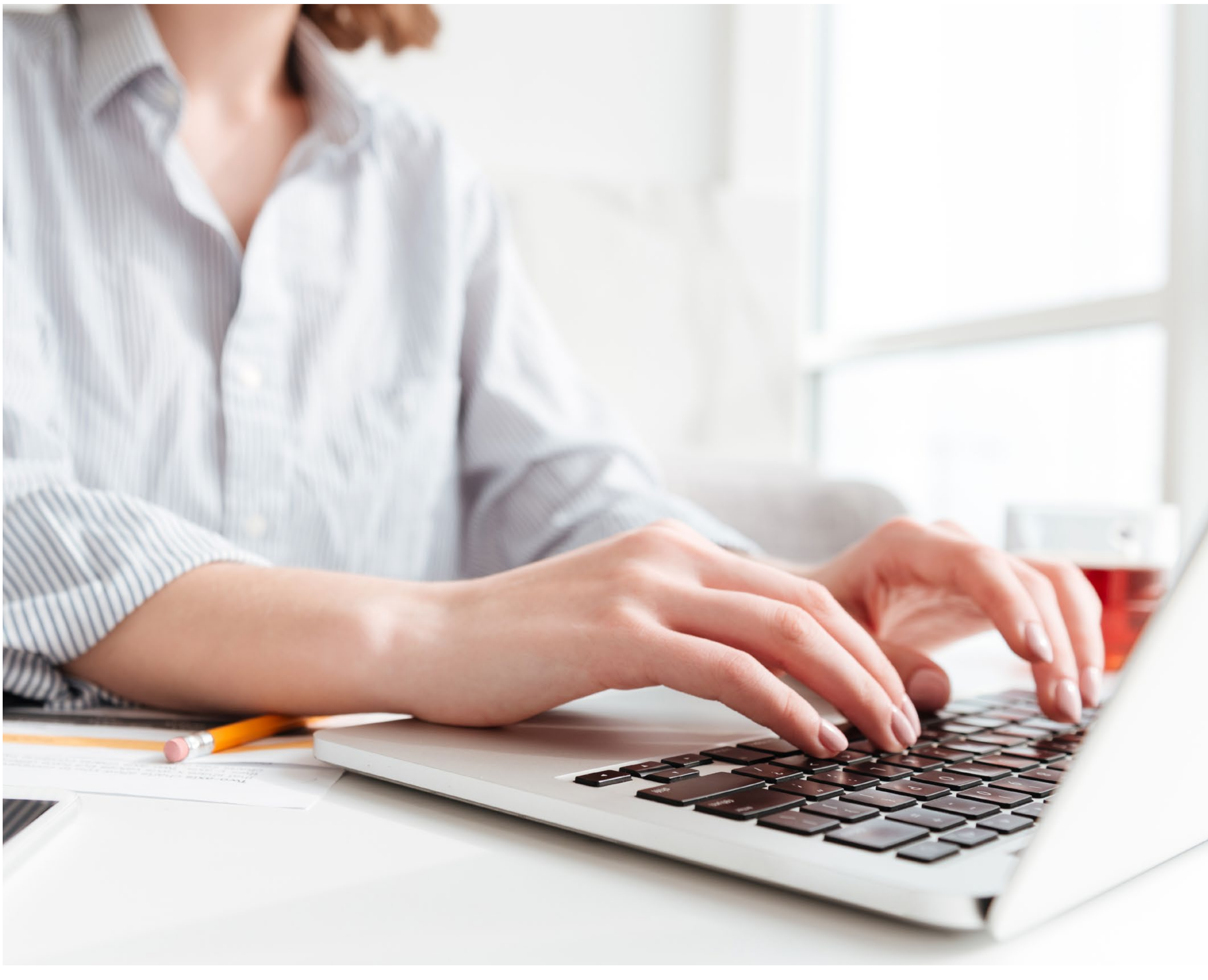
When used properly, **sales automation** can be an excellent way to improve your team's productivity and efficiency. You can gather more leads, qualify them more easily, and interact with them via the **best email follow up and nurture sequences**.

But, in addition to knowing which **sales enablement tools** to use, effective sales automation also includes knowing what mistakes to avoid. From choosing the wrong tools to using automation features incorrectly, there are several areas where things can go sideways.

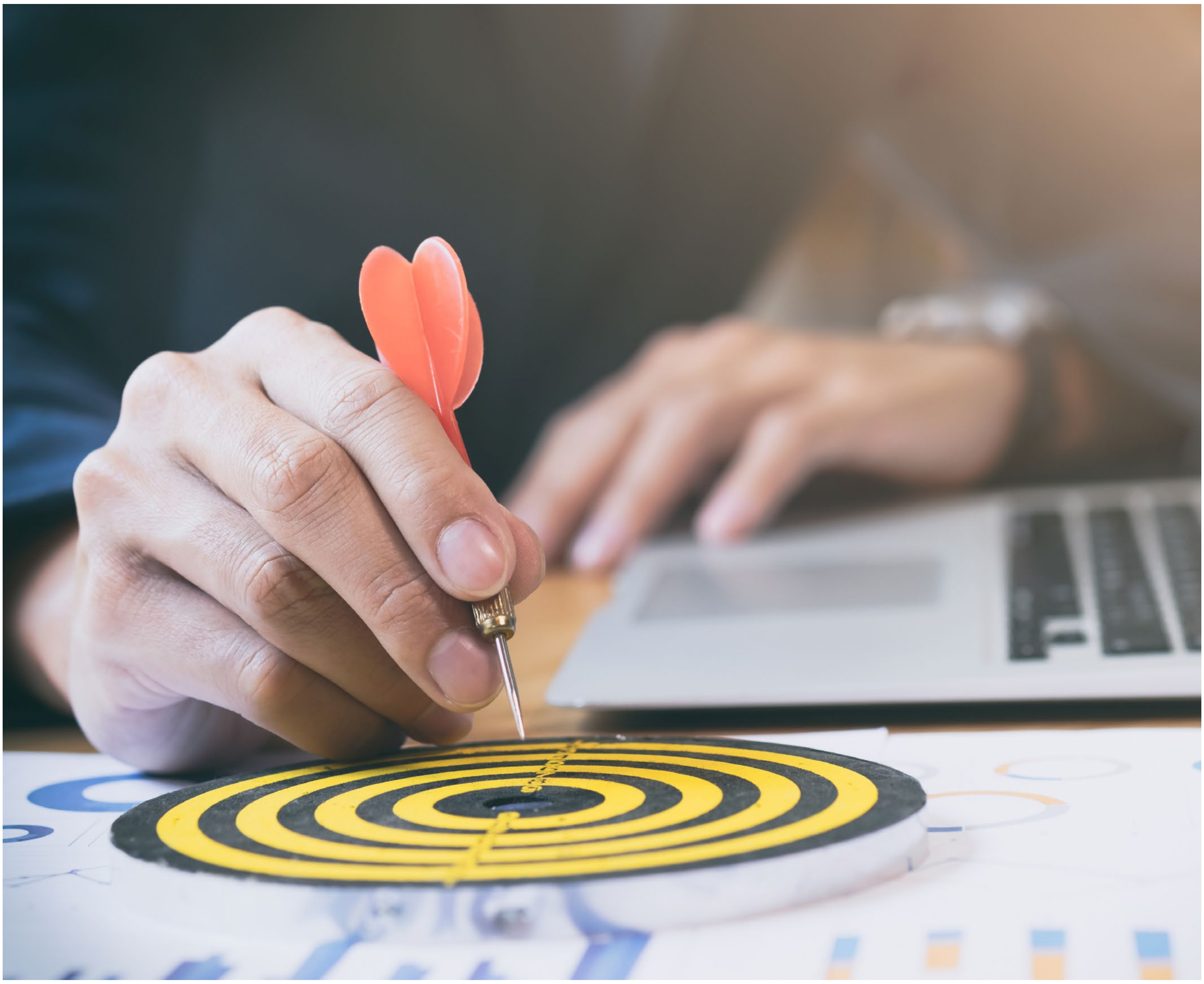
By learning what mistakes to avoid, you can confidently use your **sales automation software** and set yourself up for success.



Mistake #1
NOT HAVING A GOAL

Whether you are talking about automating sales or something else, one of the biggest mistakes you can make is not having a goal. You can't focus your efforts without a goal.

Additionally, tracking your progress is not as valuable if there is no end goal. Looking at data and analytics can provide some insight, but you need to know what direction the data should be heading in and what point you want it to reach. Otherwise, you can't effectively evaluate how well your automation is going.



Mistake #2
USING DIRTY DATA

Data is a crucial part of **building sales pipeline** and setting up your automation process. But you will need to have the right data for this to be possible. While everyone wants to work with high-quality data, not every company can access it.

Examples of dirty data include the following:

- Duplicate records
- Data with naming inconsistencies
- Outdated contact information
- Incorrect attribution

Another common example is using the same email address database for years without cleaning it. In that case, the data will likely include duplicate emails, spam addresses, and disengaged users. If you use this dirty email list, you will find yourself with low engagement numbers, lost leads, and high email marketing costs. It would also hurt your IP reputation due to those factors.

Moreover, you will waste your time and money if you use dirty data for lead generation, lead nurturing, and other sales campaigns.

Mistake #3
NOT USING YOUR DATA TO ITS FULL POTENTIAL

Even with automation, you put in some effort to get all that data on your prospects. So, make sure to get all the insights you can from the data you gather. That data can be incredibly useful for segmentation and personalization, both of which we'll talk about later in this guide.

Mistake #4
NOT REVISITING YOUR AUTOMATED SEQUENCES

The goal of using the **best prospecting tools for sales** is to automate processes so your team can focus on other tasks. But you don't want to take this to the extreme. Some companies make the mistake of setting up their automation sequences and just letting them run without checking in to see how they are doing.

In reality, the best **automated sales funnel** will include routine checks. You need to be regularly looking at the data to ensure that your **automated lead generation software** is meeting your goals and that you are making the most of it. Without doing this, your campaign can easily go stale and cease to be effective.

Mistake #5
FOCUSING JUST ON OUTPUT WHEN EVALUATING

Another common mistake is checking the automated software but not looking at the right information. More specifically, it's common to just look at the output you are getting without thinking about other factors. This can lead to low-quality leads or poor connections with them. Instead, assess performance and be sure to constantly optimize. Pay attention to quality as well as quantity and regularly assess how your tools are serving your **sales enablement strategies**.

Mistake #6
NOT EVALUATING METRICS AT THE RIGHT TIME

When it comes to analyzing your automation process, you need to make sure that you evaluate metrics at the right time, in addition to checking the right ones. You may also want to check metrics at every stage in your **sales pipeline report**. This is the only way to ensure that you can pinpoint which parts of your sales funnel are working and which aren't.

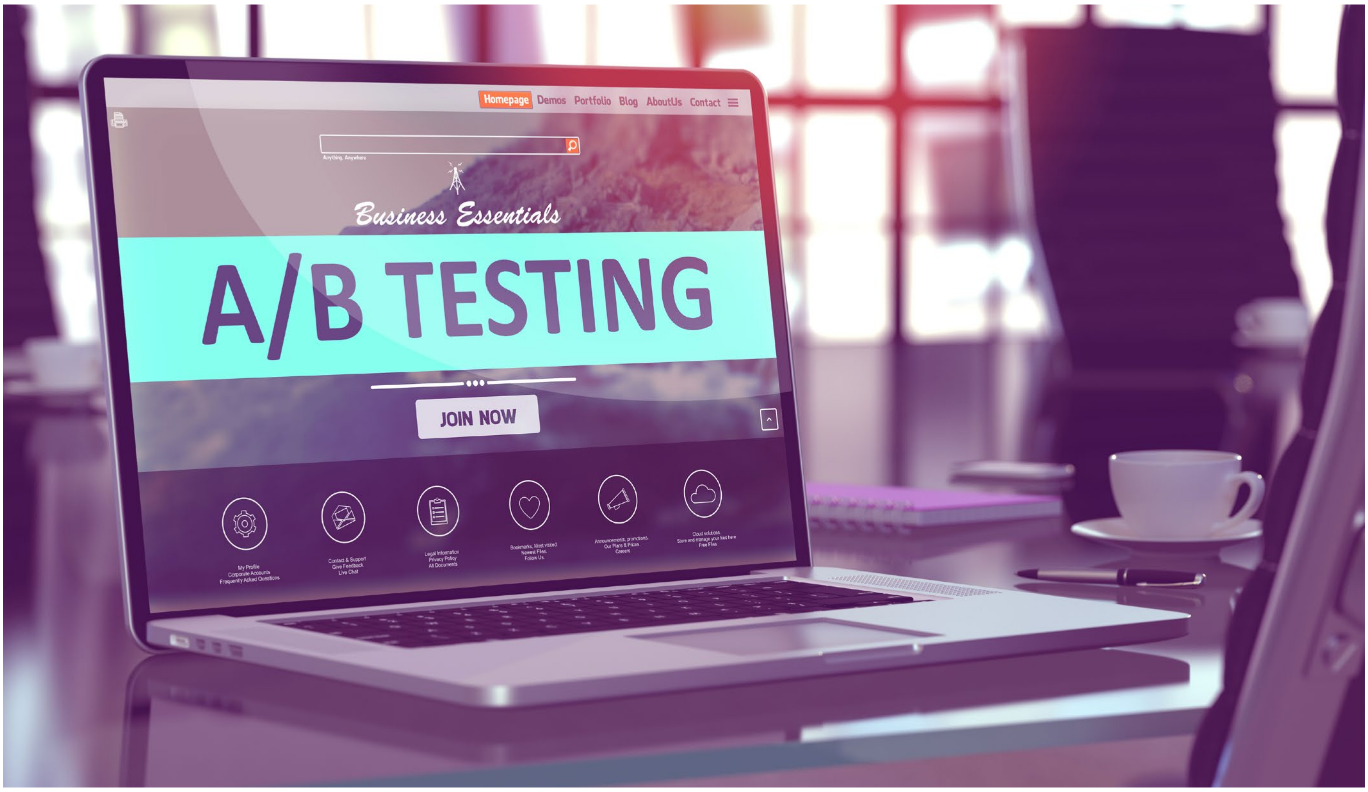
If you save your evaluation until the end, you will only know that something had gone wrong, not when it did.

Mistake #7
NOT TESTING ENOUGH OTHER ASPECTS OF YOUR SALES STRATEGY AND OPERATIONS

As you create your **sales prospecting funnel**, you should use A/B testing. You can do this with landing pages, subject lines, whether or not to use GIFs in your messages, or nearly anything else.

Remember that testing will help you optimize the **sales lead generation process**, as you will be able to tell what works well and what doesn't.

On a similar note, don't forget to test any flows and processes that you enable. For example, once you **create an automated sales funnel**, test it before you launch it. This is the only way to ensure that it works as you planned it to.



Mistake #8
BABYSITTING YOUR AUTOMATION AND INCREASING YOUR TEAM'S WORKLOAD

While you need to gather data on your automation and occasionally check in to confirm it is working properly, you don't want to go overboard. If your team ends up "babysitting" your automation, you give them more work instead of taking work away from them.

The **top lead generation tools** won't require your team to constantly monitor them. You can set them up and check them occasionally. They will also likely create reports to make it easy for your team to confirm you are reaching your goals.

Mistake #9
NOT CHOOSING THE RIGHT AUTOMATION TOOL

Many potential mistakes with automation stem from using the wrong **sales automation tools**. For example, most companies have a vague idea of what tasks they want to automate, but they may not know what other functionalities they need.

There are hundreds of **sales automation platform** options, but many companies don't know which one to use or can't find one with the features they need. In fact, 45.9% of companies that don't use marketing automation told researchers that their biggest obstacle was finding a platform with the features they needed.

If you aren't sure what to look for in your sales prospecting tools, start by looking for programs with the following features:

- A user-friendly interface that is intuitive to use
- A knowledge base or guides
- Strong customer support tools
- Advanced reporting and analytics
- Integrations
- Scalability

Alfred integrates with more than 3,000 tools and applications via native integrations, the approved Zapier app, or webhooks.

Mistake #10
NOT MAKING THE MOST OF YOUR AUTOMATION TOOL

Once you choose the right automation tool for your sales processes, you also need to know how to use all of the features effectively. Almost 60% of B2B professionals don't think they are taking advantage of the full potential of their marketing automation tools.

Sometimes, this may come from the simple fact that you don't know how to use all of the tools or don't know how they may benefit you. This is where a demo can come in handy, as can choosing a company with excellent customer support.

Alfred offers all prospective clients a free demo as well as a free trial to show you the full functionality of the software. We also have an extensive selection of guides on our website to help you make the most of every feature. Of course, our support team is also easy to reach out to.

Mistake #11
NOT CHOOSING SOFTWARE THAT CAN MANAGE TEAMS

One commonly overlooked feature is the ability to handle multiple accounts and manage teams. It is incredibly rare for just a single person on your team to handle **lead prospecting**, **outreach tips**, and everything else you use your **outreach sales automation** for.

If multiple people are going to be using the software, then you need to be able to have multiple accounts on it, along with the ability to manage them.

Alfred's team management features support multiple accounts. These features were specifically designed for enterprise companies, so they can easily accommodate teams of any size.

Mistake #12
NOT CHOOSING SOFTWARE WITH THE RIGHT INTEGRATIONS - ESPECIALLY WITH YOUR CRM

We mentioned that the best **sales engagement platform** will have plenty of integrations. But the most important of these integrations is with your CRM. If your CRM and automation tools don't integrate seamlessly, you will find yourself having to take a lot of roundabout steps instead of streamlining the processes.

In addition to its thousands of integrations, Alfred has a built-in LinkedIn CRM. You can also use this feature to see the various actions that Alfred performed for every lead or connection. Use the CRM to view the information scraped from LinkedIn and exclude prospects from campaigns.

Mistake #13
CREATING A STRATEGY BASED ON YOUR TOOLS

When it comes to choosing your **sales management systems** and automation tools, it's unfortunately common to let the system dictate your strategy. Many companies will just use whatever automated functions the system offers and do without the others. But this is a backward approach.

Ideally, you want to come up with your strategy and then find **B2B sales enablement tools** that allow you to follow it.

Mistake #14
USING JUST ONE AUTOMATION STRATEGY

Part of the reason it is so important to choose the right **prospecting tools for sales** is so that you can get plenty of functionality from them. Otherwise, you may make the common mistake of just following a single strategy for automation.

Maybe you are just automating a single strategy, or maybe all of your automation only focuses on a single goal. In either case, you are missing out and not using automation to its full potential. Remember that even if a task only takes a few minutes to complete, it adds up over time and may be a good candidate for automation.

Depending on the software you choose, you may want to consider automating the following:

- Lead scoring
- Lead nurturing
- Email sequences
- LinkedIn message sequences
- Chatbots
- Task management
- Lead rotation
- Drip campaigns
- Contracts and quotes
- Scheduling, including meetings and calls
- Data entry

Mistake #15
NOT AUTOMATING THE RIGHT STEPS

Not every task will be a good candidate for automation. Some sales teams will do well to automate all the tasks mentioned above while others should only automate some of them.

Simply put, you don't want to just automate tasks because you can. You want to carefully choose what to automate based on what will be useful and deliver results.

When choosing parts of your **sales strategy framework** to automate, you want to focus on those that are:

- Impactful
- Impersonal
- Easy

Mistake #16
AUTOMATING TOO MUCH AND REMOVING THE PERSONAL TOUCH

Carefully choosing what aspects of **qualifying prospects** and outreach to automate is important because you want to maximize your productivity and efficiency without eliminating the personal touch.

You hired your sales team for a reason. They are great at **building a sales strategy** and connecting with prospects. If you automate them out of the system, you aren't taking advantage of their skills. That's why the **best practices in sales prospecting** have you combine automation with a personal touch. Simply put, plan your automation so that there are occasional human touchpoints between the automated workflows.

Mistake #17
NOT TRAINING YOUR TEAM

As mentioned, the **best sales prospecting software** will be easy to use and fairly intuitive. But that doesn't mean you shouldn't train your team on how to use it. Even the most intuitive software requires at least some training.

After all, without training, your team won't know about all of the features. They can likely figure out some of the basic functionality themselves, but what about more complicated things? Or what about using the data to develop a **channel sales strategy**?

You are essentially wasting the best features of your software if you don't train your team on how to use them. Without proper training, they may not even realize they aren't using all of the features.

Mistake #18
TRAINING ISN'T OPTIMIZED

A follow-up mistake to this is if you train your team on the sales tools for prospecting but don't follow best practices when setting it up.

As you come up with a plan for training your team, keep the following suggestions in mind:

- **Include the software reps in training sessions.** They will know the tools the best, as well as the best practices for using them and common mistakes or challenges to overcome.
- **Don't train everyone on everything.** Keep the training to the features and tools that each department or person needs to know. (And have some members of leadership know how everything works).
- **Have multiple training sessions.** Holding multiple training sessions allows you to appeal to multiple learning styles and prevent overloading your team members with new information.

Mistake #19
GENERATING LOW-QUALITY LEADS

The best sales management software will focus on generating high-quality leads, as its creators understand that quality is more important than quantity when it comes to leads.

A classic example of using low-quality leads is buying a database of email addresses from a third party and importing it into your automation software. You will have incredibly low click and open rates, annoy email recipients, and fail to convert any prospects or leads.

Instead, use the **top sales prospecting tools** to generate high-quality leads. Combine this with other methods, such as pop-up forms and landing pages offering valuable information or resources in exchange for an email address.

Alfred demonstrates ***how to use LinkedIn for sales*** *and generate high-quality leads. It can find a wealth of leads by looking at relevant LinkedIn events, groups, and posts. From there, it not only automates the process of sending messages but also scrapes the lead's data, making it easy for you to reach them on other channels, personalize messages, and segment your audience.*

Mistake #20
NOT SEGMENTING YOUR EMAIL LIST

One of the most important aspects of **how to write outreach emails** is to segment your list. This lets you add an element of customization to each of the emails (or messages on other platforms like LinkedIn).

Remember that you will get much better results from your **outreach campaign** if you segment your audience in some way. That's because you can ensure that you send only useful emails to each segment. Most leads won't be interested in everything you have to share with them. And if you overwhelm them with irrelevant emails, they are likely to unsubscribe.

Mistake #21
SENDING TOO MANY MESSAGES OR SPAMMING YOUR LIST

As mentioned, one of the reasons to segment your audience is to avoid sending too many messages to your subscribers. This brings us to another common mistake: spamming your list.

Unfortunately, automation makes it easy to spam your list. After all, you can just set up a sequence and send it to thousands of people with the press of a button.

But that will annoy your recipients and encourage them to unsubscribe from your list. You will have to experiment and figure out the appropriate frequency for sending messages to your audience. It will likely be somewhere between every few days and once every week or two, but it can vary greatly.

The **best sales automation software** will even have tools to help you decide how frequently to send messages and to help you avoid limits on specific platforms.

Alfred tracks the various messaging limits on LinkedIn so you don't get your account flagged by sending messages to too many prospects. The system automatically sets your limits to be far enough under the maximum to avoid flagging while still making the most of LinkedIn contacts. You can also adjust the limits if you want, but doing so risks your LinkedIn account being flagged.

Mistake #22
NOT DEFINING YOUR TARGET AUDIENCE

Before you can segment your email list, you will need to define your target audience. Failing to define your target audience is yet another common mistake with sales automation (or any type of sales). If you don't accurately define your audience, you won't be able to get high-quality leads, as you won't know what types of leads you are looking for.

The most popular method of defining your target audience is to create customer personas. These include the basic demographic information about your audience as well as their goals and challenges. You can typically gather the information you need to create personas from market research, including customer surveys.

Mistake #23
WRITING MESSAGES WITH POOR COPY

Whether you are writing emails, messages on LinkedIn, or any other type of outreach, it's a common mistake to write poor copy. In the worst-case scenario, it will be filled with spelling mistakes and grammatical errors. But those are far from the only challenges in **how to write a cold email**.

You need to write content that is interesting and engaging. It needs to be enough to move your lead onto the next stage in the sales funnel or at least encourage them to continue on their journey.

Mistake #24
BEING AFRAID OF TEMPLATES

Templates are an easy solution to the problem of poor copy. You only have to write the content for your emails once, and then you can just automate it. But some companies are hesitant to use templates. In reality, templates are only a problem if you don't choose the right one and personalize it.

Having access to a selection of templates will be incredibly useful. Your team doesn't have to worry about crafting new messages from scratch for every single message in a sequence. As such, you don't have to teach everyone the intricate details of writing good emails.

Just remember that to use templates effectively, you need to segment your audience so that each person gets the appropriate template. You will also need to personalize the templates, so the messages don't seem generic.

Alfred includes hundreds of templates, so you don't have to create them yourself. If you prefer, you can also create your own template and use it.

Mistake #25
NOT PERSONALIZING MESSAGES

Segmentation is just one part of writing **cold emails that get responses**. Another of the crucial **cold email tips** is to add personalization to your messages.

This minimizes the automated feel of the message. It also shows your leads that you care about them enough to personalize your messaging with a bit of effort. Combined with segmentation, this can do wonders to improve your email open and response rates.

Alfred makes it incredibly easy to personalize LinkedIn messages. The system is already set up to personalize common fields such as name, job title, and company. You can add even more personalization by importing a .CSV file with leads. Alfred will automatically capture any extra columns in your file, turning those into more customization options.

Mistake #26
FOCUSING ON A SINGLE OUTREACH CHANNEL

When using **sales outreach tools**, another common mistake is to focus too much on a single channel, such as email. In reality, the best **sales conversion strategy** will reach out to your leads on multiple channels.

For example, you can combine **LinkedIn outreach automation** with email automation. The more channels you use, the more likely it is that you will interact with your prospect on their preferred channel.

Using more channels also increases your touchpoints. Given that **sales pipeline management best practices** indicate that having more touchpoints pushes your prospect along the sales funnel, these additional touchpoints are crucial.

Through Alfred, you can create an automated sequence that covers multiple channels. Start the conversation on LinkedIn before moving it to email and then to Twitter. Then, move between the channels as many times as you need to convert your prospect. Alfred will automatically stop the sequence when you achieve conversion, so you don't have to worry about accidentally overwhelming your lead with messages.

Mistake #27
NOT HAVING MARKETING AND SALES TEAMS ON THE SAME PAGE

This is one of the common mistakes with **sales process automation** that has nothing to do with the automation itself and everything to do with your actions and goals. You should never use your sales automation in a silo, and the same is true of marketing automation.

The sales and marketing teams need to be working together and in constant communication. They should work together throughout the entire process, from creating a **lead qualification checklist** to setting up **sales email automation**.

Remember that while your sales and marketing teams have slightly different goals, there is significant overlap. More importantly, they are both likely to use the **top sales engagement platforms**, so they must be on the same page and be ready to work together.

THE BOTTOM LINE

By knowing what mistakes to avoid with your sales automation, you can focus on **B2B prospecting strategies** that work.

Alfred is set up to minimize your risk of making the mistakes on this list while giving you all of the tools you need to follow **sales prospecting best practices**.

Reach out to our team to schedule a demo and then start your free trial of Alfred. There is no credit card required.