



GET INSPIRED

20 Automation Ideas to Supercharge Your Sales Process

**TRIED AND
TESTED TIPS
THAT WORK**





Some useful thoughts and ideas on improving sales and sales operations from the team at Luru. Our software helps remove the friction that exists in accessing and using CRM and helps maximize the value that sales reps, sales leaders, and sales ops teams derive out of their sales stack.

www.luru.app

We also periodically share our thoughts on sales, sales operations, and life in general at luru.app/blog .

We'll spare you the legalese literature. Feel free to distribute this book as is, but we request you not to copy contents and use it without giving us appropriate credit.





Daniel Pink in his book **“To sell is human”** makes an evocative statement that **“Whether we like it or not, we all work in sales”**. Some nod in complete agreement with the statement, while many vehemently reject it till the beauty of his argument dawns on them - **“Selling is the ability to move others to exchange what they have for what we have is crucial to our survival and our happiness. It has helped our species evolve, lifted our living standards, and enhanced our daily lives.”**

Everyone is selling, everyone is consuming. This very nature is what makes sales interesting and challenging. As a salesperson, you are competing against the direct and indirect competition, availability of time, and money. These constraints have forced us to look at sales differently with time. Selling is as much a science as it is an art.

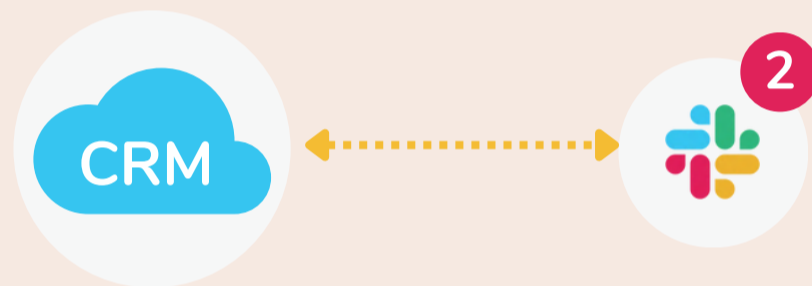
Sales methodologies have evolved over time to cater to these needs. Winning teams have started investing in revenue operations as a function so that they just don't sell, but sell effectively. **The best functioning sales teams do less with more.** Teams have realised that it is more effective to squeeze more from your existing funnel than trying to load your funnel with





irrelevant leads. Teams stopped chasing vanity metrics and started looking at metrics that mattered more diligently.

Gone are the days when sales folks were territorial to a point of working in silos. Selling has become a team game now. Smarter teams have taken to automating their workflows ensuring that sales reps don't waste their time on admin work, as well as ensuring that they have the right data for decision making.



In this book, we look at 20 automations that successful sales teams use to accelerate their sales funnel. With no code builders like Luru you can create these automations by integrating your CRM with tools that your team works on (Slack, Zoom etc).

These are real examples of how sales teams pushed **notifications from their CRM to the slack channels** where the sales team works and vice versa.

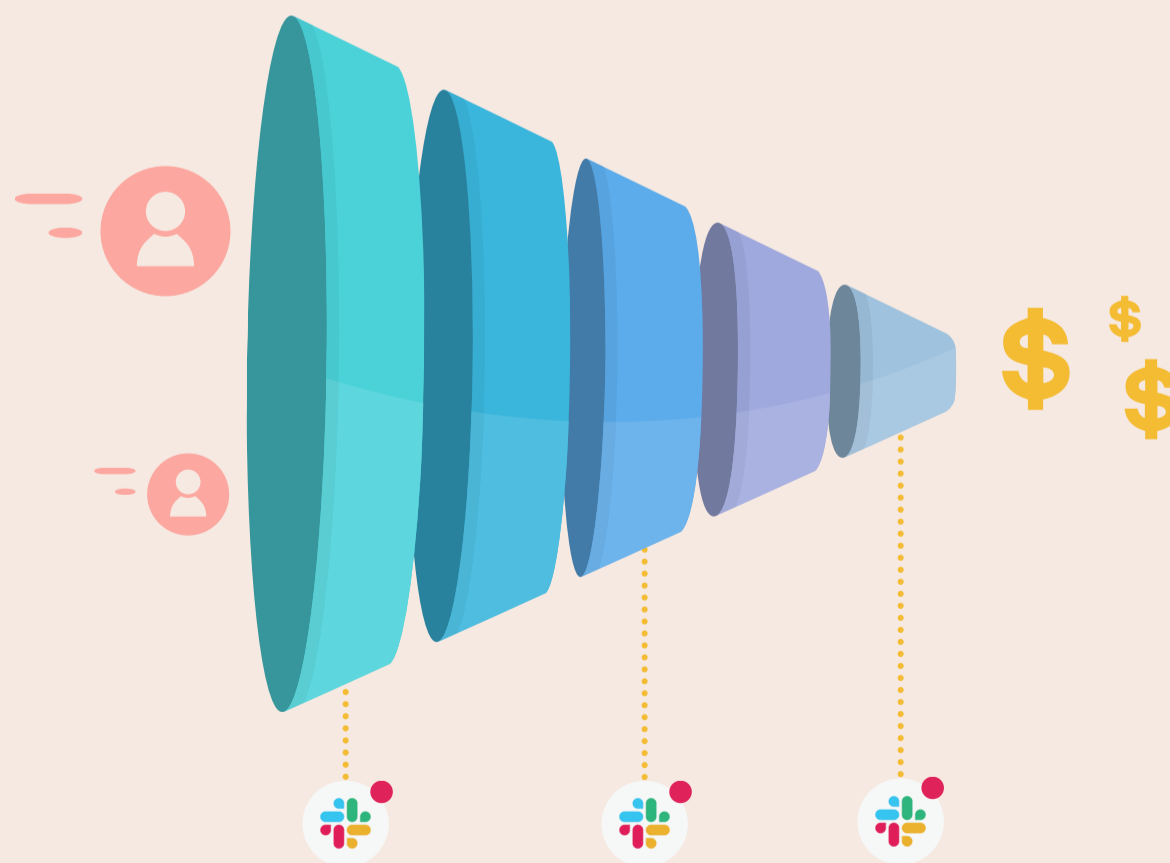
Let's jump right in.





Automations That Work

Here are 20 automation ideas used by efficient sales teams to automate their processes throughout the pipeline.



Know when a new lead enters a pipeline



 1 We got a new lead in the **Enquiry** pipeline.

Name: Fisk Industries

Stage: New

Lead Source: Google

Owner: Dwight Schrute

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Know when a lead signs up. Say thanks to Marketing team and get into action right away.



Celebrate SDR wins



2



Yay! A new meeting is booked.

Name: Hammer Industries

Owner: Ryan Howard

Stage: Demo

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Celebrate SDR wins with the sales team. Acknowledge their efforts and get ready to ace the demo.



Deploy MEDDIC or any sales process with ease



2

A deal in **Prospecting** stage has MEDDIC fields missing

Name: Life Foundation

Owner: Jim Halpert

Identify Pain: <empty>

Champion: <empty>

Update

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Deploy your sales process with ease right on Slack. Get your team to follow process right from within Slack.



Get alerted when a high-value deal signs up



2



A deal entered the **Prospecting** stage with high value.

Name: Hammer Industries

Owner: Dwight Schrute

Value: \$ 8 Million

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Support your AE when that high value deal enters an interesting stage. Get all the right stake holders involved.



Unassigned leads alerts



A deal has no owner assigned

Name: S.T.A.R Labs

Owner: <empty>

Add Owner

✓ 1

No Leads left behind! Ensure every lead gets the attention it deserves.



Celebrate when deals are won



2



Yay! We have a new customer.

Name: Start Industries

Owner: Jim Halpert

Value: \$ 3 Million

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Is there a better time to celebrate than when an AE closes a deal? Let the team know and celebrate. Play as a team.



Know when deals are stuck



A deal is stuck in **Demo** stage for 4 weeks

Name: Stark Industries

Stage: Demo

Owner: Andy Bernard

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Being informed early when deals are not moving will provide you and the team to react early and plan the next steps.



Nudge when close date is in the past



A deal has close date in the past

Name: Nelson and Murdock

Owner: Pam Beesly

Close date: 11/11/2022

Update

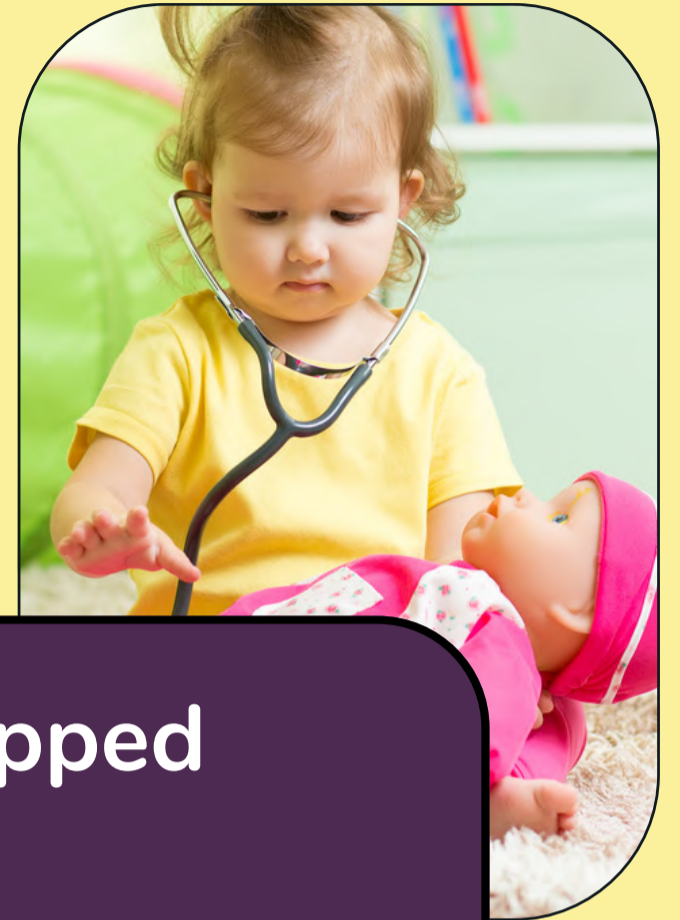


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Keep your pipeline healthy to reflect reality. Send nudges when close dates are stuck in the past.



Account health score dip alerts



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An account health score has dropped by 20%!

Name: Lex Corp

Health score: 10%

Update

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Get real-time notifications when an Account's health score drops. Act early and get accounts's health back on track.



Remind to revisit old deals



Time to revisit old deals. Send them reminder and some love.

Name: Halo Corporation

Lost date: 11/11/2022

Owner: Kevin Malone

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✓ 1

Old deals can be gold. Remind to revisit those old deals you had parked to revisit later.



Contract renewal reminder



An account's annual contract is up for renewal

Name: Themyscira Industries

Renwal date: 04/04/2023

Owner: Pam Beesly

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Prepare in advance for renewals and followup early. Don't lose that renewal to a competitor.



No activity in a long time



A deal in **POC** stage has no activity in the last 15 days.

Name: Cybertek

Last update: 05/01/2023

Owner: Pam Beesly

Update

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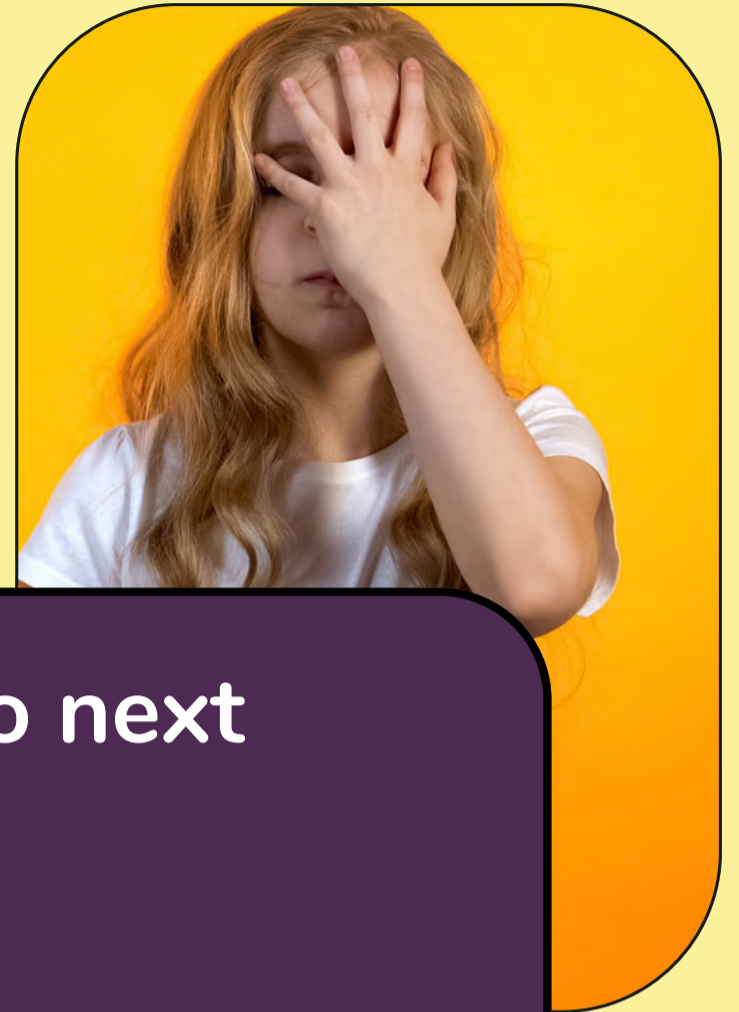
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Betting on a deal only to have the bubble burst later? Listen to the signals.
No activity is bad news.



Deal moved to next quarter



A deal close date was moved to next quarter.

Name: Hancock Transport

Close date: 07/07/2023

Owner: Ryan Howard

Update

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Not all surprises are good surprises.
Ensure your projections are in sync with
reality. Know when things are amiss.



Know why deals are lost in real-time



A deal was marked lost

Name: Rand Enterprises

Lost reason: Competitor

Owner: Ryan Howard

Update

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There is much to learn from lost deals.
Analyze what we could've done differently.
See if you could salvage the deal.



What happened in the meeting?



You just had a meeting. Do you want to update notes?

Name: Synnergy Corp

Notes: <empty>

Next steps: <empty>

Update

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Data captured close to the event are the most accurate. Nudge your AEs to update their notes right after a meeting.



High discount warning



A deal just entered **negotiation** stage with high discount >30%.

Name: Advanced Idea Mechanics

Discount: 40%

Owner: Ryan Howard

Update

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Discounts are a great tool to close deals.
But is the large discount for that deal worth it?



Nudge on missing next steps



A large value deal in **Demo** stage is missing next steps.

Name: Oscorp

Next steps: <empty>

Owner: Ryan Howard

Update

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A deal closes one step at a time. And it is important to know the next step.
Nudge a little if they are missing.



All deals closing this week



2



You have 7 deals closing this week

Owner: Ryan Howard

Show me the money



1



Reminders on the deals with close dates
this week. Maybe you need to help out
or maybe you just need to celebrate.



Deal lost due to product issues



A deal did not close due to missing features.

Name: Queen Industries

Lost reason: Product features missing

Owner: Ryan Howard

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When a deal goes bust due to issues in the product, let the product team know right away. Fix faster, sell better.



Simplify AE-CS handoff



2

A won deal is looking to implement a solution.

Name: Momentun Labs

Sales Owner: Dwight Schrute

CSM Owner: Phyllis

Solution: Improve cyber security

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Ease handoffs with right information.
Information that lets us win and our
customers win.





When you are creating automations that pushes notifications to collaboration tools like Slack, **please keep the following in mind**

- People love instant recognition. Celebrate wins
- When you share information on winning deals in public, it also indirectly pushes sales reps to add more information. That's a great way for you to improve CRM health
- Celebrate in public and review in private. It makes sense to push deal wins on public channels, while it would be more effective to push missing activity notification in closed or private channels
- Do not overwhelm the team with a barrage of notifications. Schedule them in working hours

One of the fascinating outcomes we have observed with efficiently functioning teams is that the cost of their sales stack is much lower. Teams tend to invest in a lot of tools to fix their problems. But at the **core of most problems** is a broken CRM health. If you automate a lot of your CRM work and make it easier for your sales rep to fill in data, the sales stack spend comes down significantly.

Get started on your automation journey.





GET STARTED FOR FREE

Implement Winning Automations in 5 Minutes



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Connect your **Slack** account



Create workflows with the **No Code** Luru Workflow Builder



Enjoy your coffee and watch your sales processes come live effectively

