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# From Qualification Chaos to Complete Visibility:

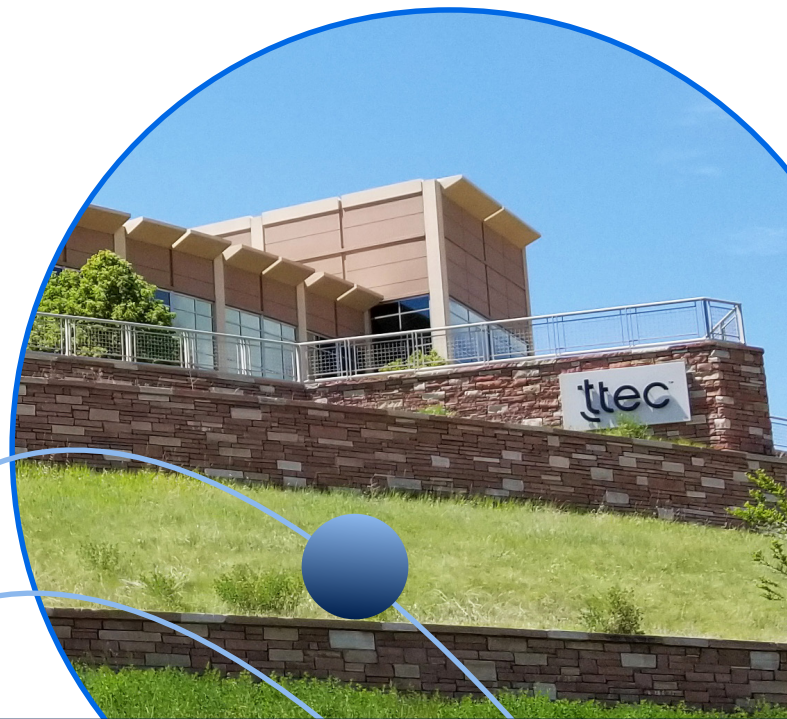
## TTEC's Revamped Sales Process That Increased Win Rates and Improved Rep Satisfaction



**TTEC helps companies build engaged, happy, and profitable customer experiences powered by a combination of humanity and technology.**

Through its Customer Experience as a Service platform, TTEC uses a phased approach to transformation that helps companies set priorities, get quick wins, and build a shared vision for the future.

By partnering with People.ai, TTEC is now delivering a more rewarding experience for its own sales team. The company addressed concerns surrounding its current inspection process for deal qualification, adding the structure needed to determine deal quality while helping reps focus more on what they do best – engaging their accounts and serving customers.



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**Jonathan Gray**  
Senior Vice President

## Challenge Statement

With nearly 40 years under its belt in the customer experience industry, TTEC has set out to deliver experiences that captivate customers and dramatically improve the bottom line. But behind the scenes, an inconsistent and ineffective deal qualification process threatened to negatively impact the company's own revenue goals and sales rep retention.

Discipline in disqualifying deals was one area of improvement for the TTEC team. Part of this problem stemmed from an unstructured inspection process intended to identify when a deal is appropriately qualified, but manual inputs into Excel from salespeople made it difficult. Working outside of Salesforce, where TTEC's opportunity records were located, also made it challenging to identify whether opportunities were qualified.

## Roadblocks to TTEC's Success

"As a company, poor deal qualification was one of our top pain points. This affected our ability to use data and determine if it was predictive of deal health and success," said Jonathan Gray, senior vice president at TTEC.

Not knowing whether its sales pipeline was healthy was the equivalent of working in the dark for TTEC. A disciplined deal qualification process was needed to disqualify deals appropriately, helping to eliminate the deals that aren't profitable and focus on the ones that are. Without this critical information, TTEC was often working with a pipeline that wasn't reflective of its truly qualified leads.

Another mounting issue that faced TTEC was working offline from Salesforce in Microsoft Word and Excel. Navigating multiple tools outside of where opportunity records were located meant critical data could get lost in the back-and-forth transition, leaving data integrity compromised.

"Using an offline excel tool for deal qualification made it hard for Sales Leaders to understand deal health scores and compare them to win rates, which led to understandable frustration for our team," Gray said.



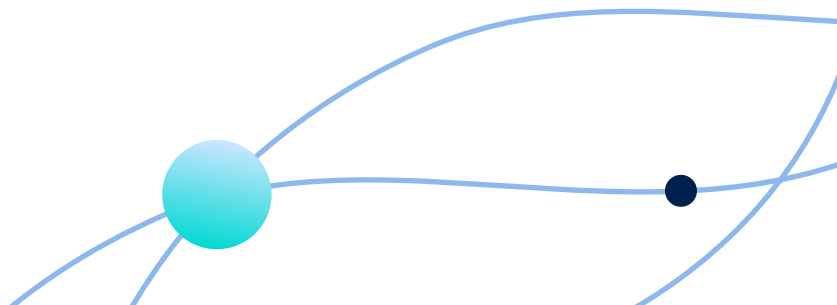
We've been delighted with our People.ai partnership. The People.ai team has been instrumental in helping us see the product's full potential and how it can impact our sellers' process throughout the buyer journey. For instance, we started off only thinking about automation, deal health, and opportunity tracking. We quickly learned there's so much more People.ai could do with Sales Solution and the evolution to supporting the entire revenue cycle.

**Jonathan Gray**  
Senior Vice President at TTEC

These roadblocks were happening at a pivotal time where a really tight job market was driving seller turnover up 36% above target. It was more than just the market dynamics, though, reps were spending too much time on manual tasks like offline deal qualification, and not enough time actively engaging their accounts, advancing opportunities, and retiring quota.

TTEC knew alleviating sales reps' frustration around manual data entry and time-consuming administrative tasks was crucial to ensuring its workforce remained intact and could continue growing. TTEC's goal wasn't only to make sales teams more successful but happier in their roles.

TTEC needed a simplified way to make qualifying leads easier and remove exhaustive tasks in order to retain reps and entice potential hires to join its organization. Making it easier for a seller to sell and exceed their targets increases employee satisfaction.



## Integrating Structure Into the Equation with Sales Solution

After identifying areas of struggle, TTEC sought a solution to bring organization and structure into the fold and remove friction from its sales process.

“Our sales team possessed highly skilled resources that we wanted to ensure were applied to opportunities that we had a high propensity to win. We knew improving our current structure was our first priority for qualified opportunities to come through to our teams,” Gray said. “People.ai’s Sales Solution was exactly what we needed to achieve this.”

The TTEC sales team subscribed to the widely-used enterprise qualification method MEDDICC, but wasn’t seeing efficient adoption across the sales team. They needed to find a solution that helped sellers follow the MEDDICC sales strategy without adding more administrative tasks to their to-do lists, and it started by meeting their reps where they were – inside of Salesforce.

People.ai helped TTEC operationalize its MEDDICC opportunity inspection process into a centralized location in Salesforce. This allowed data to be adjacent to all other pieces of vital information that were needed to form a knowledgeable opinion and, eventually, make critical decisions about an opportunity.

Another area that needed to be addressed was the administrative overhead associated with MEDDICC, which was often overwhelming for salespeople.

“Salespeople were required to write information, administer forms, populate fields, etc. Then, send everything in preset email processes to ensure the data got distributed to the right people in the organization,” Gray said. “This way of working wasn’t sustainable for the long term as it was time-consuming and took salespeople’s focus away from their most important priority – selling.”

Sales Solution streamlined administrative tasks by consolidating information into a simple and seamless process, making for less stressed salespeople. This also resulted in higher adoption by salespeople because People.ai made the process organized without the extra steps of information being imported or exported from Salesforce.

Leveraging People.ai’s Sales Solution made TTEC’s sales reps’ daily tasks faster, more intuitive, and consistent within the CRM system they use regularly. By minimizing manual data entry and administrative work and improving its deal inspection process, reps no longer had to endure the unsavory parts of their roles, increasing overall productivity and satisfaction.



## The Next Generation of Selling at TTEC

Today's reps expect a seamless sales experience, and TTEC is working to deliver that through more insights, fewer blind spots, and proactive decision-making, transforming sales performance in the process.

With its organizational structure improved, TTEC is better positioned to qualify and disqualify deals without any unnecessary friction added to the

process. Thanks to Scorecards in Sales Solution, TTEC's salespeople can qualify deals and allocate critical value assessment resources to the right deals. The TTEC team now has a solution it can count on for deal qualification, ultimately improving win rates and sales rep retention.

## ABOUT

# TTEC

**Industry:** Customer experience

**Use Cases:** Organization, Improved Structure

**Products Used:** People.ai Sales Solution

### Key Results

- With Scorecards, all of the information that TTEC needed to highly qualify a deal was centralized in one location.
- People.ai consolidated TTEC's administrative information into a seamless and straightforward process.
- The value of TTEC's inspection process increased after using Scorecards to organize around the critical information needed.
- With time-consuming tasks removed from the process, TTEC sales reps were happier and could focus on what they enjoyed most about their roles.
- The data and text analysis available through People.ai enabled TTEC to identify win rates and business pain points reasonably, which it couldn't do before.

### Key Discoveries

- Sales Solutions' ease of use and organization led to higher adoption rates from TTEC's salespeople.
- Using Scorecards during meetings led to stronger, targeted conversations around opportunity quality. As a result, TTEC team members left calls with a clearer view of where the information and competitive gaps were, which allowed them to focus conversations on how to close the identified gaps.
- Sales Solution created a more natural gateway for how to do deal intake correctly.
- Sales Solution gave a better view of TTEC's engagement with clients, allowing TTEC to focus resources and leadership support on consistently moving clients through the pipeline.

## Are You Ready to Increase Your Reps Productivity?

Find out how People.ai helps marketing leaders increase conversion rates, automate regulatory compliance, and improve campaign ROI by scheduling a demo of the People.ai solution today.

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