Opportunity Awaits: How Top Teams Maximize The Effectiveness of Deal Qualification Methodologies

So you decided to implement a new sales qualification methodology. Over the last six months, the executive committee bought in and the GTM team has been trained and understands the new direction your organization is taking. Everyone's ready for the roll-out and the future looks promising. All that's left is for the sales team to execute.

If your team sticks with the new methodology, you'll likely see a healthy ROI for the time and money you've spent. Firms where salespeople use the company's methodology and get consistent coaching see an average of 73% quota attainment[1].

But what data will you use to calculate the effectiveness of the methodology? Will you merely base it on on discussions with reps and success stories from managers?

Passively observing improved pipeline and conversion rates shortly after implementation might suggest you're achieving that ROI. But in reality, these initial outcomes could be reflective of previous groundwork.

Without real-time insight into rep activity, management has no way to answer for how well the sales methodology is working. Yet, in many organizations, salespeople feel too busy or not incentivized to do the heavy administrative work of logging qualification details into CRMs – because such tasks generally do not drive revenue.

Organizations that successfully implement sales methodologies make it easy on their reps to stick to the process. These groups install repeatable, scalable, and predictable processes for their reps to use throughout the sales cycle. This makes it easier for leadership teams to coach salespeople who already know how to sell, and ensures the methodology is adhered to and successful over the long haul.

Track, measure, and validate the impact of your sales methodology with this checklist:

- [ ] **Improve methodology adoption rates** with capabilities that relieve your reps of having to manually capture and enter qualification data into your CRM.
- [ ] **Increase insight for sales leadership into overall pipeline health** by using opportunity scorecards that are configurable to your sales methodology and help reps qualify and advance deals in a more efficient, predictable manner.
- [ ] **Shorten sales cycles and de-risk opportunities** using relationship maps that help sales teams identify the key stakeholders that reps need to engage to close deals faster.

1. Miller Heiman Group, "CSO Insights 2013 Sales Enablement Study"

Maximize sales methodology adoption, impact, and close rates with AI-powered automation and CRM-native tools

Imagine the value of a tool that takes on the burden of time-consuming call logging and data entry from your reps, leaving them more time to generate revenue. Then consider if that same tool could provide sales leadership with the ability to determine not only whether reps are engaging with target accounts, but that they're also adhering to your methodology while they do it.

People.ai makes it possible with scorecards, relationship maps, and automated data capture that help reps follow your methodology in a simple, repeatable way. Better yet, all qualification details and assessments are stored natively in your CRM – keeping reps where they already work for optimal efficiency, while giving managers and leaders the insights they need to validate, track, and measure methodology success.

Opportunity Scorecards
Effortlessly customized to your existing sales methodology, this powerful tool gives your team the ability to validate and track sales qualification steps natively in your CRM. You can also generate and export reports from your CRM to provide frontline managers and sales executives with the insights they need to measure methodology adoption and its execution against pipeline health.

Relationship Maps
These fully reportable visual maps give reps and sales leaders the ability to track all stakeholder engagement throughout the sales cycle. Armed with these insights, reps and extended sales teams can identify gaps in the customer's buying group, spot low engagement with key personas, and strategically plot next steps to de-risk deals and ensure a faster path to close.

Automated Activity Capture
People.ai automatically captures sales activity data such as emails and meeting invites, and matches it to the right account, contact, and opportunity record in your CRM. This timesaving approach ensures vital details that can be used to help qualify deals are stored in your CRM, rather than scattered across spreadsheets or standalone tools. The activity data can also fuel your opportunity scorecard and relationship maps, providing additional confidence into the health of a particular deal and your overall pipeline.

How TTEC gained complete visibility into its new sales process to drive higher win rates and improve seller satisfaction

"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 its sales solutions and the evolution to supporting the entire revenue cycle."

Jonathan Gray
Senior Vice President

ttec™

Outcomes Included:

27% increase in scheduled meetings

10% more opportunities engaged

10% increase in deals won

Read the full case study

Unleash the full potential of your sales methodology and win more deals, faster

Learn more about tracking, validating, and measuring the impact of your sales methodology and creating a healthier pipeline by downloading our workbook or by requesting a demo.