

# Fueling Your CRM With High Octane Data Puts Your Sales Team Back in the Driver's Seat

Every organization has a vision of what a successful sales team looks like. It's unlikely you set your sights on salespeople spending over half their day manually updating the CRM instead of selling. But when tracking processes becomes a higher priority than making progress on deals, managers run out of time to coach salespeople who have limited time to sell.

According to a Time Management for Sales study, approximately 62% of a sales rep's time is spent using sales technology.<sup>1</sup> The same study highlights that the top two frustrations of sales teams are doing repetitive administrative tasks that could be automated and updating multiple systems that ought to be connected.

It's demoralizing for sales teams to spend this much time updating CRMs and other tools when they're better suited putting their skills to use developing relationships and making money for themselves and the organization.

Even if sales leaders aren't hearing complaints from their reps, they're still thinking it, and organizational dysfunction is never good for sales numbers.

What is proven to improve sales results is AI and automation. Companies using AI in sales are increasing their leads by more than 50%, reducing call time by 60-70%, and realizing cost reductions of 40-60%.<sup>2</sup>

Embedding AI capabilities natively into your CRM empowers your team to focus on what you hired them to do: sell. The right AI-powered solution fuels CRMs with high-quality data while freeing your sales team to focus more on building relationships, generating pipeline, and closing deals. It's a model example of people working hand-in-hand with AI.

## Keep your sales team running like a well-oiled machine with this checklist:

- ☐ **Relieve sales team of tedious admin work** by automating all data and activity capture, matching new info to the right accounts, leads and opportunities
- ☐ **Engage top priority accounts or flag and re-engage target accounts** with low sales activity and pipeline
- ☐ **Catch at risk deals before they slip** using deal indicators triggered by automated activity capture
- ☐ **Focus on high win rate personas** by comparing sales engagement with marketing efforts
- ☐ **Increase win rates** by identifying which past activities drove success

<sup>1</sup> Spiceworks, "5 Considerations for Deploying a Digital B2B Sales Approach", February 2022

<sup>2</sup> AI Multiple, "AI in Sales: 15 AI Sales Applications/ Use Cases in 2022," August 2022

# Fine-tune your CRM data with best-in-class AI



## Automated Activity Capture

People.ai automatically documents sales team member emails, calendar info, and dialers, matching them directly to the relevant accounts, leads, and opportunities. This timesaving approach relieves reps from administrative work and allows them to more focus on engaging customers and prospects, as the technology automatically uploads activity data to the CRM.



## Email Filtering

People.ai filters out emails irrelevant to your sales process. If emails from legal, HR, and IT aren't part of the deal, they never hit the CRM. All spam and sensitive content is blocked too.



## Contact Capturing & Data Enrichment

People.ai captures and syncs all contacts to your CRM and automatically enriches that data as new information becomes available. For example, say a C-level executive replies to an email chain midway through a deal. People.ai will automatically create a contact for that executive, enriching the file with persona-level details, and prompt the rep to add the executive to their relationship map. With this insight, the rep can sell higher into the organization, potentially de-risking the deal and shortening the sales cycle. Managers will have access to this same information in their own dashboard, providing valuable insights for coaching and deal reviews.



## Deal Alerts & Engagement Level Scores

People.ai automatically surfaces underserved priority accounts and de-risks opportunities using engagement scores based on criteria such as past and upcoming engagements, number of executives or champions who are engaged, and time elapsed within each sales stage. Equipped with these insights, reps, managers, and sales leaders can ensure the right contacts are engaged at the right time, minimizing at-risk opportunities at all stages of the sales cycle.



## Engagement Dashboard for Lead Sourcing

See the big picture as People.ai automatically fuels your CRM with high-quality data. Allocate the right resources, such as SEs, to high-potential accounts and identify related opportunities using engagement scores – a user-friendly, seamless way to visualize your sales process.

## How cloud communications industry leader Vonage boosted its CRM and analytics with People.ai

"Our sales leaders now have additional intelligence and insight into the health of our client accounts and their engagement with prospects and customers. People.ai really helped us through its analytics. Thanks to People.ai, there are more educated and informed discussions between sales leaders and reps."

Terry Bird VP  
Sales Enablement



### Outcomes Included:

**22%** increase in meetings

**13%** more opps engaged

**14%** increase in accounts engaged

[Read the full case study](#)

## AI-powered CRM data: Where the rubber meets the road

Learn more about supercharging your CRM with better data by [downloading our workbook](#) or take People.ai for a test drive today by [requesting a demo](#).