Out of the Office But Still In the Game

Six Plays to Successfully Manage a 100% Remote Sales Team

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Executive Summary

As your sales team shifts from working in the office to working from home, they need you to lead the way. We developed this playbook to help you do that effectively. We share six essential plays designed to help your team perform its best—from any location. While we've summarized the key takeaways and actions below, we encourage you to read on for more detail into how you come out on top in even the most challenging times.

Play 1: Stay Close to Your Reps—Even When They Are Far Away

- Automate the capture of activity data such as email, meetings, and contact engagement to gain a true understanding of how reps are spending their time.
- People.ai can help: Use People.ai to automatically integrate behavioral data from mail systems into CRM. Then take advantage of our sales app to spot where reps are performing well and where they can take additional steps to close business.

Play 2: Identify Your A Players

- Implement a new set of activity-based scorecards that display benchmarks, along with individual salesperson and team rankings.
- Incorporate scorecard data into coaching sessions, compensation structures, and performance improvement plans (PIPs) to help reps perform better.
- People.ai can help: Use our activity-driven dashboards to zero in on top performers and those who are underperforming.

Play 3: Reward Your A Players

- Identify activity-based leading indicators that signal future wins.
- Develop comp plans that balance these leading indicators with desired outcomes like quota attainment.
- Motivate salespeople to perform their best by sharing dashboards showing how they are doing relative to behavioral targets.
- People.ai can help: Use People.ai behavioral data as an input into comp plan attainment.

Play 4: Make Sure Reps Keep Their Heads in the Game

- Uplevel coaching sessions by giving managers information about how salespeople are spending their time and recommendations for how they could spend it more effectively.
- Encourage team selling by asking reps to leverage the relationships of their peers.
- Use leaderboards and gamification to foster friendly competition.
- People.ai can help: Use People.ai's Sales Solution to equip managers with coaching points related to rep behavior. Salespeople can use the same solution to identify colleagues who know the buyers they need to engage and who can make warm introductions.

Play 5: Hang On to Vital Intel When Your Players Switch Teams

- Capture activity and contact data as soon as it's generated and upload it to CRM immediately.
- When accounts transition to new salespeople, provide a complete history of account and deal-level activity.
- People.ai can help: Use People.ai to upload the activities and contact interactions to CRM as they occur. Use our account dashboards to access a comprehensive history of interactions for all your accounts and deals.

Play 6: Make the Most of Your Resources

- Identify accounts that reps haven't touched and reassign them. You can give them to reps who show more hustle or group them and create new territories.
- Dial down activity on non-core accounts by moving reps and resources away from them.
- People.ai can help: Analyze the account-level activity data that People.ai captures for insight into which accounts are underserved or overserved.

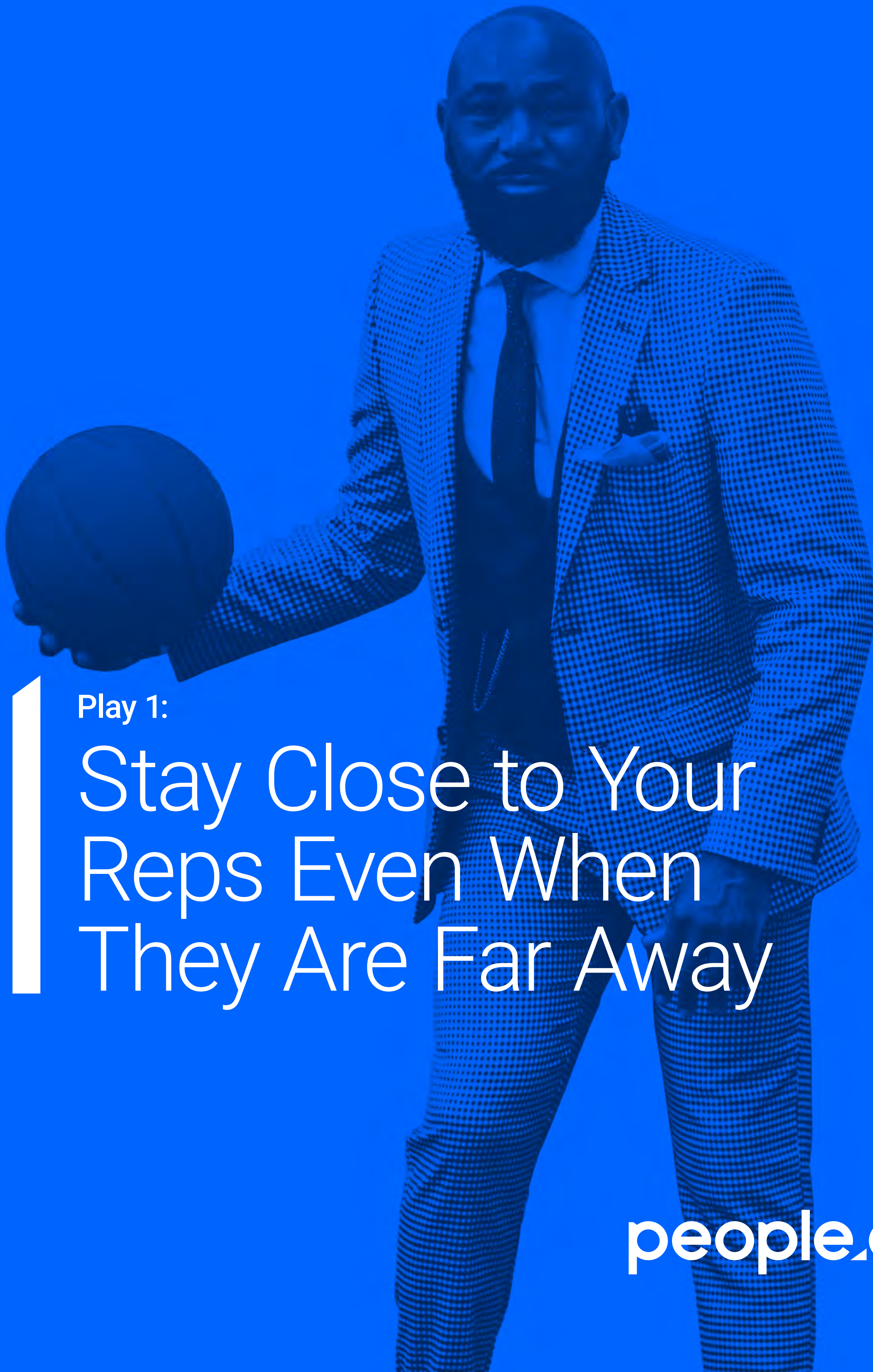
Out of the Office But Still In the Game

We live in a world where the rules of the game are constantly shifting: Bull markets, bear markets, work from the office, work from home, shake hands, bump elbows. Despite the ebbs and flows of business, great sales teams know that the fundamental game never changes—you win by delivering value to customers. They also know that whether you play the game on grass, hardwood, or via video conference, certain factors always give you a competitive edge.

So whether your game plan for the coming quarters is to protect margins or take market share, you need a proven playbook that allows you to tear the cover off the ball. Here it is, covering key plays that represent a blend of great talent, great coaching, and great data:

Play 1: Stay close to your reps—even when they are far away
Play 2: Identify your A players
Play 3: Reward your A players
Play 4: Help reps keep their heads in the game
Play 5: Hang on to vital intel when your players switch teams
Play 6: Make the most of your resources

Read on to learn how you can master these six plays and thrive with a remote sales force.



Play 1:

Stay Close to Your Reps Even When They Are Far Away

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Play 1: Stay Close to Your Reps Even When They Are Far Away

At the head of every winning team—both on the court and in the sales field—is an inspiring leader. Simply put, great managers are also great coaches. They know how to mold good reps into great ones.

But when the team goes remote, coaching gets harder . When reps are working from home, managers lose touch with their team's energy, focus and how they spend their time. Event basic activities like phone calls and meetings get much harder to monitor when the team doesn't sit together.

What's worse, activity levels typically serve as a barometer for deal health. So when managers loses touch with rep behavior, they lose touch with the pipeline too. They struggle to spot at-risk deals and may see more of them push or, worst case, close for the loss. And that wreaks havoc on the forecast.

By programmatically tapping systems like email and calendar, you can zero in on leading indicators such as new meetings and engaged contacts to get a true sense of who's contributing and where the quarter will land. Even when you can't walk across the sales floor to check in, you'll know when to reach out and where to focus

Great coaches step up when the game is on the line

Here's the good news. In this new selling environment, managers can still stay close to their teams and provide the kind of coaching that turns B players into A's and at risk deals into new customers.

For starters, managers should recognize that with access to the right information, they are in the best position to share what is—and isn't—working. To do so in a remote environment, start by capturing reliable activity data for each rep. Information on leading indicators such as the following is best:

- Total volume of emails, phone time, and meetings
- New business meetings booked and completed
- Decision makers engaged

Next, use this information to determine behaviors that separate the best from the worst performers. For instance, perhaps your top salespeople are scheduling more meetings via phone, while lower performers are sending more emails.

This real-time visibility into how your team is engaging with prospects and customers is the equivalent of walking the sales floor. It's how you identify signals for intervention, understand the focus and energy of your team and glean data-driven insights for coaching your team on what is or isn't working as conditions change.

The three powerful leading indicators noted above—combined with core data from CRM such as committed, best case, and closed deals—provide an end-to-end view into rep performance.

Last, use the data you've captured to drive weekly coaching sessions and daily check-ins. Here's a cadence you might follow.

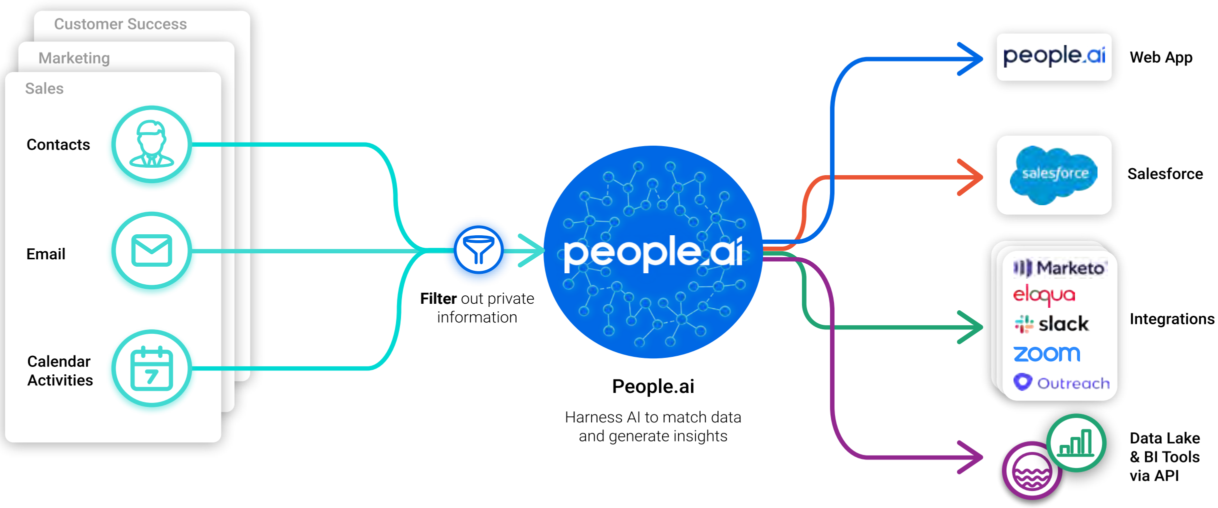
For weekly coaching sessions:

- Review your rep's past week of activities relative to benchmarks
- Inspect deals to determine the level of activity and stakeholder engagement per deal
- Pinpoint what's working and where the rep is coming up short
- Establish goals for the coming week

During each daily check-in:

- Gauge morale
- Follow up on weekly goals
- Ask how you can help

People.ai streamlines this process. We automatically capture behavioral data like email, meetings and contact engagement directly from mail systems and load it into CRM. We also use that data to power People.ai's sales manager console—an AI-driven solution that gives managers a bird's-eye view of what's going on with their reps and what they can do to improve performance.



Auto-Populate GTM Systems With Data and Insights

Play 2:

Identify Your A-Players

Play 2: Identify Your A-Players

In the sales field, a manager's assessment of rep performance tends to be based on how much business they close and associated factors like sales cycle times and deal sizes. But when the economy experiences a sudden shock, even the best salespeople find it challenging to close deals—at least in the short term. That makes it hard to distinguish top reps from the rest.

Yet companies have a greater need to know who their best performers are when times get tough. This knowledge informs decisions about where to invest extra time and energy to retain top talent—and who to let go if necessary.

It's tough coming up with the winning lineup

When the economy slows down and large swaths of buyers hit pause, metrics tied directly to revenue no longer reflect a salesperson's contribution. In response, companies must instead assess rep behavior to identify their best players.

This approach works because behavior isn't impacted by economic conditions. It's also a leading indicator of who'll be back on top with the economy heads north again. Remember: Exceptional players are always in motion and quick to pivot their game strategy in response to changes on the field.

While measuring salespeople based on their behavior makes sense in theory, the challenge is coming by objective activity data. Salespeople are notorious for not entering information into CRM, and what they do enter is often biased. Managers need a new, more reliable set of metrics to gauge performance .

Create a new scorecard

In the previous play, we discussed how People.ai allows you to tap into the mail system for an accurate view of the meetings, email exchanges and number of engaged stakeholders associated with each rep. We also noted three powerful leading indicators that point to where a salesperson will likely land for the year:

- Total volume of emails, phone time, and meetings
- New business meetings booked and completed
- Decision makers engaged

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Scorecards and leading indicators of successful performance will change as your business responds to the latest market conditions.

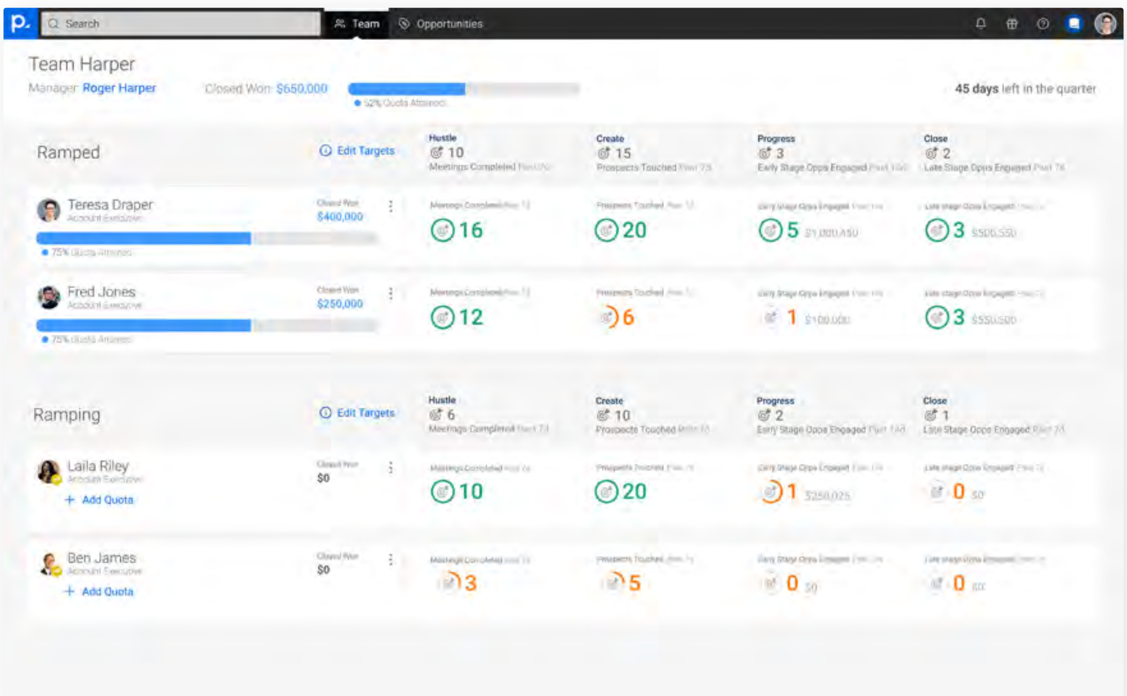
Once you've captured this information, you're in a great position to implement a new set of activity-based scorecards.

1. Surface what best in class looks like based on the moves your top-performing reps make

2. Benchmark all your reps against the gold standard

3. Rank your team and provide pointed feedback for how they can move up in the standings.

The data from this scorecard is powerful. It can be incorporated into coaching sessions, compensation structures and/or performance improvement plans (PIPs).



Play 3:

Reward Your A Players

Play 3: Reward Your A Players

Once you've identified your A players, you need to reward them. When deals dry up due to macroeconomic conditions, so will reps' variable comp. And when that happens, they may decide to move on.

Losing salespeople, especially your best ones, comes at a huge cost to the business. Consider the tremendous investment in recruiting, onboarding and ongoing training. Plus, think about the effort to replace them—top performers are hard to find especially when the economy goes south.

Your best AEs will start looking to join companies that grow in the downturn, so you need to intervene and save them. You also need to identify your worst AEs. Comp plans that factor in activity levels is the best way to reward those who work hard vs. hardly work.

Keep top performers on your team

When the economy turns, focus on paying your best players for the great plays they execute, even if they don't immediately lead to a win. Behavioral data empowers you to do that, especially if you can identify the activities that lead to closed business.

Activity-based comp plans offer a two-fold benefit by:

- Allowing your hardest working, most focused players to reap the biggest rewards
- Incenting less committed reps to move on

Automatically track rep behavior and activities

But how do you put your hands on essential behavioral data? Asking reps to self report will leave you with incomplete and suspect information—especially if reps know their paycheck is based on what they report. Your own observations as a manager may also be incomplete if salespeople are remote and can't be observed directly.

That makes automated data capture the most reliable option. The data People.ai gives you equates to a reliable foundation for your comp plans. People.ai eliminates subjectivity because it goes to the source of what reps do day in an day out—their calendar and inbox. We upload this data into CRM and the BI platforms that feed your comp systems.

Reframe your comp plans to compete effectively

Once you're ready to set up activity-based comp plans, focus them on meaningful measures. When salespeople recognize that compensation will be based on behavior, they will immediately start executing heavily weighted activities at higher rates. Consequently, make sure you've locked in on the types and sequence of activities that lead to more business.

People.ai will surface the metrics that matter:

- How many people your reps need to meet with to get a deal done
- Who is typically in the buyer group
- How many touches per stakeholder lead to the best outcomes
- What's the optimal ratio of email, phone, and face-to-face meetings

Incent your reps to perform their best

One of the best ways to motivate salespeople is to give them real-time information on how they are tracking against their comp plan. Share dashboards with salespeople and managers so they always know the score. (We'll go into more detail on this in the next play.) In addition, you can incorporate behavioral data into SPIFs to drive short-term focus in targeted areas, such as opening a new territory or driving growth for a new offering.

> "People.ai provides an invaluable lens into the quantitative data associated with our reps' activities, giving us a better handle of our forecast and driving more insightful conversations and more meaningful action."

Vadim Zakiyan
Head of Sales Operations, LivePerson

LIVEPERSON

Play 4:

Make Sure Reps Keep Their Heads in the Game

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Play 4: Make Sure Reps Keep Their Heads in the Game

Selling is about collaboration, so when the team gets spread out, energy levels and focus can drop fast. Sales people get frustrated when they can't interact with each other and when they don't know where to spend time. They may also experience anxiety as they contemplate the real possibility of not meeting individual and team targets. In the worst-case scenarios, they may give up and stop contributing altogether.

Help salespeople perform to their full potential

This is the time for coaches to help their reps maintain positive energy, perspective, and performance. It starts by providing a prescriptive plan that will keep them busy and, more importantly, highly productive.

Here are three areas where managers can focus as they help reps move deals over the line:

- Single-threaded deals. Few deals close based on a single relationship. Good managers push their reps to establish a network of contacts within an account and help them determine how best to engage key players.
- Engagement by role. It's not enough to focus on the number of relationships reps establish within a given account. The buying committee comprises multiple roles. Deals move more quickly and close more frequently when reps get the entire committee plugged into the sales cycle as soon as possible. Great coaching involves identifying missing roles and working with reps to pull them into the deal.
- Visible next steps. Deals move forward based on the activities salespeople initiate. But when the going gets tough, reps may lose momentum. By simply asking "What's the next thing you can do to move this deal forward?", managers can immediately put a salesperson back in the game.

Even the most talented and committed reps take their eye off the ball, especially when they're working from home or in isolated environments. Keep them focused by providing a game plan that lays out the activities and interactions that will deliver the win. Then gamify key metrics and let salespeople compete against each other to keep things interesting and moving in the right direction.

The typical buying group for a complex B2B solution involves 6 to 10 decision makers.

Gartner
The New B2B Buying **Journey**

Gartner

We've described the powerful behavioral data that People.ai captures. This information allows managers zero in on the points described above. With this information at their fingertips, they'll spend less time understanding what's happening and more time helping reps shape what will happen moving forward.

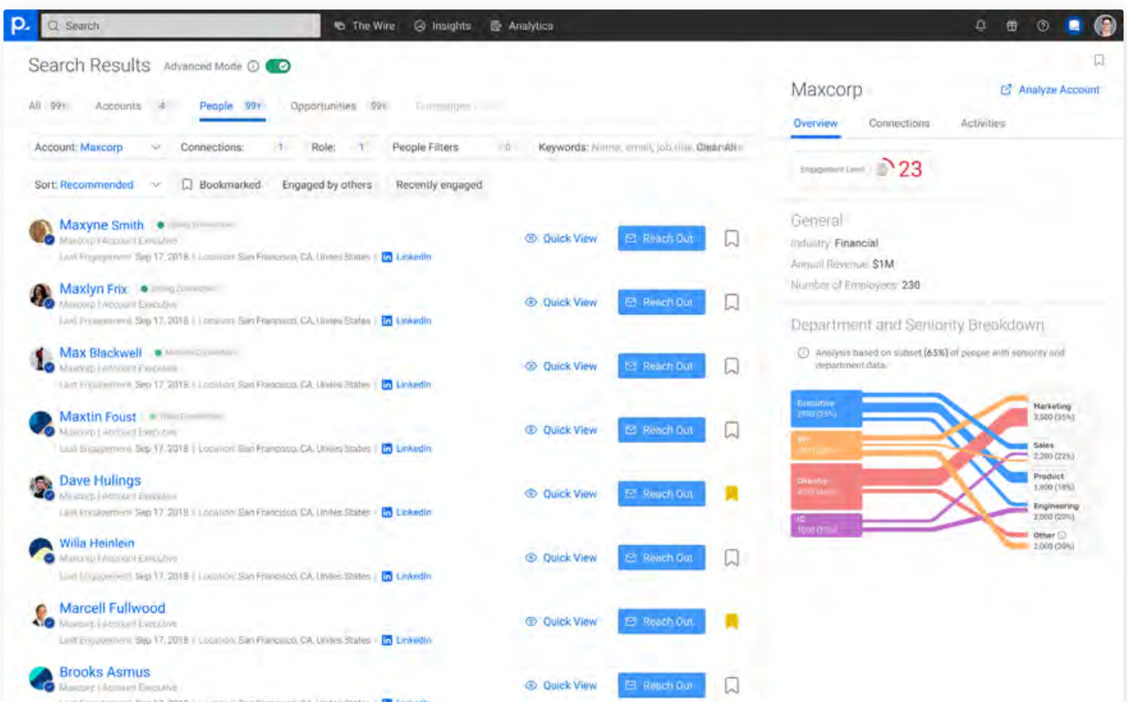
For example a rep might be working a deal hard but isn't selling high enough into the account. Sharing this insight with a plan to reach highly influential stakeholders can re-energize the salesperson.

Or perhaps a rep booked eight virtual meetings with prospects, but only converted the one where an executive got involved. It's quite possible this rep needs to take a new approach to meeting preparation.

Make selling a team sport again

Enlisting salespeople to help peers close deals has a huge impact on team morale and camaraderie. Take advantage of the fact that your salespeople have spent years building relationships with influential people. By surfacing these relationships to everyone on the team, you'll immediately spot who's in a position to make warm introductions to stakeholders that could make the difference between winning and losing a deal.

People.ai can help make this kind of selling a reality. We map the relationships your sales team has built and surface the ones that will lead to more business. But unlike social media which makes assumptions about relationships based on connection requests, we assess actual behavioral data, such as the frequency of meetings or email exchanges, to gauge relationship strength. Put this capability in the hands of your reps and you'll see the level of collaborative selling and warm introductions spike.



Tap into the competitive spirit

Managers often see the best performance from salespeople competing to win contests. With that in mind, use leaderboards to track the key metrics that will lead to success and harness your reps' competitive nature. If you're capturing reps' activity data and using it to coach and incentivize them, you've already done the hard work. Pull that same data into leaderboards, and peers will motivate each other to stay on track.

You can also assign points to the desired behaviors, perhaps by weighting activities based on their importance in the deal cycle:

- Individual emails, phone time, and meetings score lower points
- New business meetings booked and completed as well as decision makers engaged score additional points
- Closed opportunities score the most points

Access the results in People.ai or publish them using a simple tool like email. Be sure to call attention to high performers and encourage friendly rivalries. Also, give salespeople the ability to recognize each other by posting virtual "high fives", tags and comments.

Play 5:

Hang On to Vital Intel When Your Players Switch Teams

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Play 5: Hang On to Vital Intel When Your Players Switch Teams

No matter how hard you work to retain talent, you're going to lose salespeople when the economy slows and the work environment changes. However, this might not be bad. If you've acknowledged and rewarded your best talent, you're more likely to see lower-performing reps walk out the door. When that happens, you cut expenses without suffering a material impact to the top line.

That said, even mediocre reps gather valuable information that will help your business. They know people and have context on accounts and deals based on the activity they've driven. You need an insurance policy to ensure that when salespeople leave, this valuable data doesn't leave with them.

By capturing activity data the moment it's generated and automatically uploading it to CRM, People.ai keeps vital contact, account and deal information inside a company walls even when employees move on. This creates continuity for managers and the new reps who step in.

Context is everything

When Keep in mind that it's not enough to simply capture activities and drop them into CRM. Information like email exchanges and meetings needs context. Without knowing which accounts and opportunities the information relates to, it's useless. But linking a calendar appointment from Outlook or Gmail to a deal in Salesforce is easier said than done.

People.ai captures historical and current activity and contact information—every email, meeting, deal participant, and calls with customers—so you preserve the contacts and deal knowledge reps built up while working for your company.

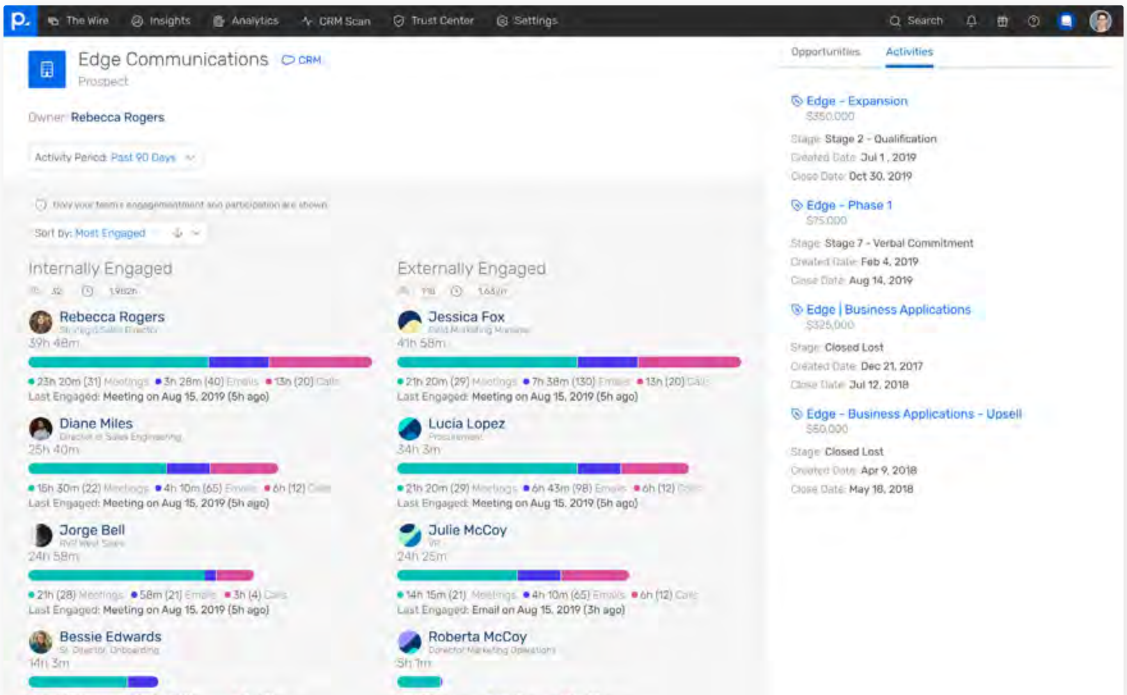
Take a meeting between a rep and someone at GE, for example. GE operates multiple subsidiaries and regional divisions, each the potential source of several deals. So how does People.ai know which associations to build? Once again, we put AI to work, analyzing hundreds of signals such as meeting participants and the meeting description to intelligently establish the right links.

When information is matched the right way, it's easy to understand exactly what's happening in an account—who is involved and activities to date. More importantly, it's easy to identify what still needs to be done to move relationships and deals forward.

Even if the salesperson who worked a deal is gone, new reps can pick up without missing a beat. One of our account executives experienced this firsthand upon joining People.ai. With access to vital information on the accounts she inherited—including the key players and activities to date—she reviewed months' worth of client interactions in a few minutes, picking up valuable context that ultimately allowed her to close a deal that had been initiated long before she joined.

Put intel and stats in everyone's hands

Be sure to package this valuable data in a usable way. Using dashboards, you can display a 360-degree view of accounts and contacts to unite all relevant information in a single view, making it easy for managers and salespeople to access during account planning and coaching sessions. You can also feed contact information into your company's marketing automation systems via CRM where it can be used to power ABM campaigns, revive deals that have gone cold and accelerate deals in flight.



Play 6:

Make the Most of Your Resources

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Play 6: Make the Most of Your Resources

Salespeople turnover will inevitably rise as the sales environment becomes more challenging and your company exits underperforming reps. Typically sales and operations leaders don't adjust territory and account assignments more than once a year due to the disruption this causes. But higher rep turnover provides the opportunity for sales and operations leaders to tune resource allocations more frequently without creating major disruptions. These adjustments can offset some (and in rare occasions, all) the productivity loss that stems from attrition.

In a very real sense, your company can do more with less. Fewer reps means lower expenses while smart resource reallocation increases the productivity of your remaining salespeople to protect top-line revenue. Lower expenses and consistent revenues translate to healthier margins—just what companies are looking for when the economy is contracting.

At a time when it's critical to maximize the impact of every person and every dollar, sales leaders need to make smart choices about where—and where not—to invest.

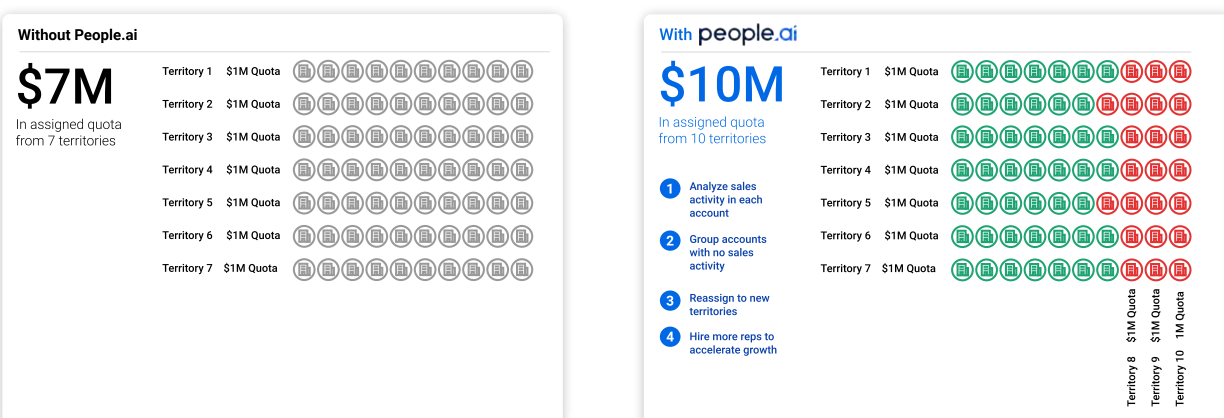
Refine Territories Based On Activity Data

People.ai data brings added clarity to territory definition. Once you've identified your A players, you'll also know your B and C players. You'll also know exactly how much activity they're driving on an account by account basis. Here are three steps that will allow you to use this information to enhance they way you cut territories:

1. Analyze the account-level activity data that People.ai captures to determine which accounts aren't being touched. Reassign these accounts to more active reps or group them to create entirely new territories.

2. Next look at stakeholder coverage levels—the number of contacts associated with each account—to spot accounts where you're single threaded. These accounts are at risk if your main contact moves on. Either coach account owners to improve or consider re-assigning these accounts to reps who understand how to identify buyer circles and who can engage multiple players.

3. Lastly, identify non-core accounts where activity is high. Since you've already determined that these accounts should be a lower priority, dial down activity by moving reps and resources away from them.



Reassign Accounts That Haven't Been Touched

Conclusion: Build a Legacy of Winning

Managing a remote sales team can be challenging, especially for salesleaders who have traditionally kept their finger on the pulse via face to face interactions and first hand observations. But if managers execute the right set of plays, they'll deliver great results regardless of where the team is based.

Start by getting direct visibility into how salespeople are spending their time. Once you've achieved that, recognizing your A players, building activity based comp plans and keeping teams focused on executing the right kinds of sales motions gets a lot easier.

People.ai can help. We give you direct line of sight into what salespeople are doing by integrating your mail and calendar system with CRM. We also use AI to surface behavioral recommendations that will help reps close more business, give managers better visibility into what's tracking and what's not and help executives call a more accurate forecast. In today's environment, we provide the tools sales leaders need to build a legacy of winning.