

The Ultimate Guide to IT Sales Growth

Top companies are investing big bucks in transforming their sales teams and making them run like well-oiled machines.

They know that time is money, and if their salespeople can make more sales in the same 8-hour day, everyone wins.

But the good news for you is that you don't have to be a multimillion-dollar company to run a powerful sales machine. There are plenty of ways to achieve sales transformation. It's all about defining best practices and holding accountability to them.

Sales transformation processes make your sales team more efficient.

If you want to streamline your sales processes and sell more, you are in the right place. *The Ultimate Guide to IT Sales Growth* is your ticket to success. It spells out how to improve your entire sales experience in 5 simple steps.

Those who have followed the advice in this guide have reduced their sales cycles by as much as 25%. What would a shorter sales cycle do for your business? It's time to find out.

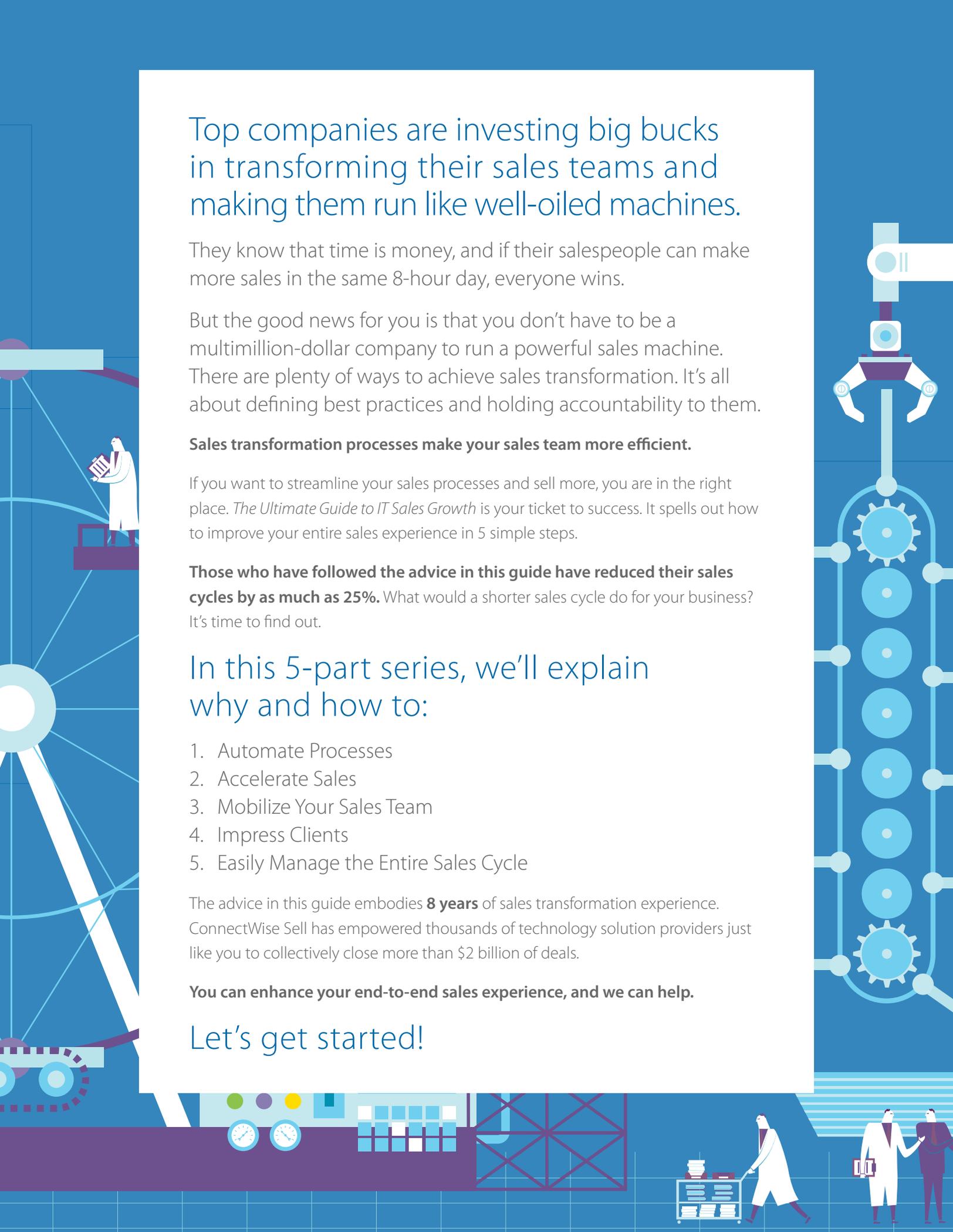
In this 5-part series, we'll explain why and how to:

1. Automate Processes
2. Accelerate Sales
3. Mobilize Your Sales Team
4. Impress Clients
5. Easily Manage the Entire Sales Cycle

The advice in this guide embodies **8 years** of sales transformation experience. ConnectWise Sell has empowered thousands of technology solution providers just like you to collectively close more than \$2 billion of deals.

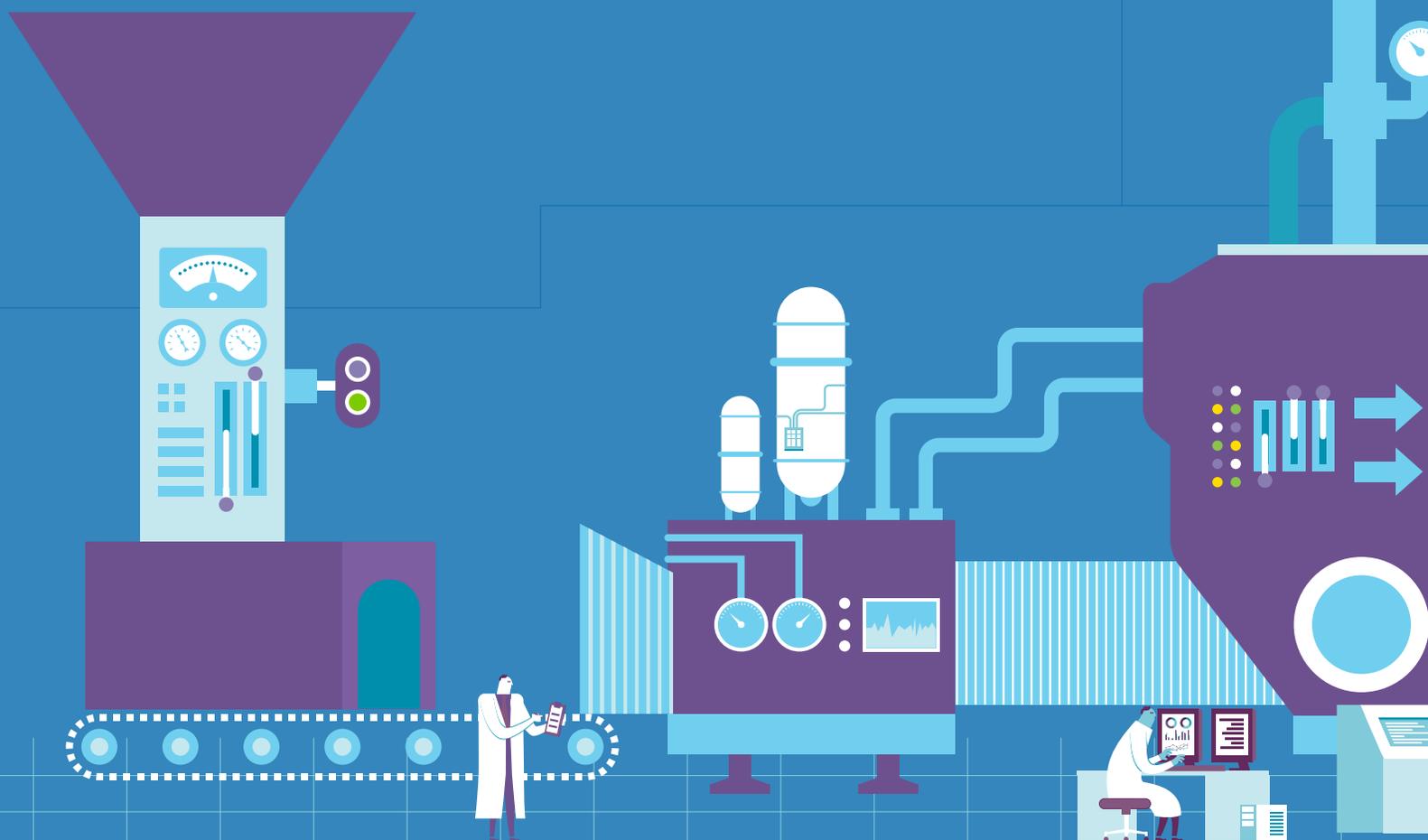
You can enhance your end-to-end sales experience, and we can help.

Let's get started!



PART
1

Automate Processes



Welcome to Part 1 of The Ultimate Guide to IT Sales Growth!

In this section, we'll talk about how automation can transform your sales.

Automation Frees You to Grow

Homegrown business processes can seem perfect in the beginning, but they're rarely scalable. You'll hang on as long as you can, but one day you'll hit a breaking point when you realize it's costing more to keep your system running than it would to invest in technology that gives you more efficient processes.

The idea of implementing a whole new sales transformation process may sound scary, but it doesn't have to be. Many solutions are now very easy to implement, and the payoff of increased productivity makes it well worth the effort.

It's never too soon (or late) to start using a quote and proposal automation solution. ConnectWise Sell is exactly that, and so much more.

Let's talk about how automation can move your business forward. In the rest of this guide, we'll talk about:

1. Guided Selling
2. Removing Admin Burdens
3. Locking Down Pricing
4. Peer Reviewing
5. Instantly Updating Your CRM
6. Easy Upselling¹



Guided Selling

Does your organization have well-planned processes that reps adhere to? Or is it like the wild west, where everyone is doing their own thing and your manager is only focusing on whichever fire is blazing the highest? Guided selling serves as the guardrail that keeps reps on track with your sales processes.

ConnectWise Sell keeps sales reps in line.

Guided selling reins in sales processes, walking reps through repeatable processes. It's easy for them to follow, and they can't take any shortcuts.



ConnectWise Sell Helps You Send More Quotes

Users send out 49% more proposals per month than those using other solutions.*

*Aberdeen Group, "Breaking the Laws of Physics: Shortening the Last Sales Mile through Workflow Automation," March 2013

Removing Admin Burdens

Do you know how much time your sales reps are spending on administrative tasks? All the quote creation, re-creation, and searching for pricing availability gets in the way of closing deals.

Removing admin burdens is the top thing you can do to keep your reps selling. Automate many of those burdens away with the right technology, like ConnectWise Sell. By creating easy, automated, paperless workflows, you free your salespeople to do more of what they're best at: **selling**.

25% of a sales rep's time is spent on administrative tasks.*

*IKO System, "66 Crazy Sales Figures," Essential Statistics.



Locking Down Pricing

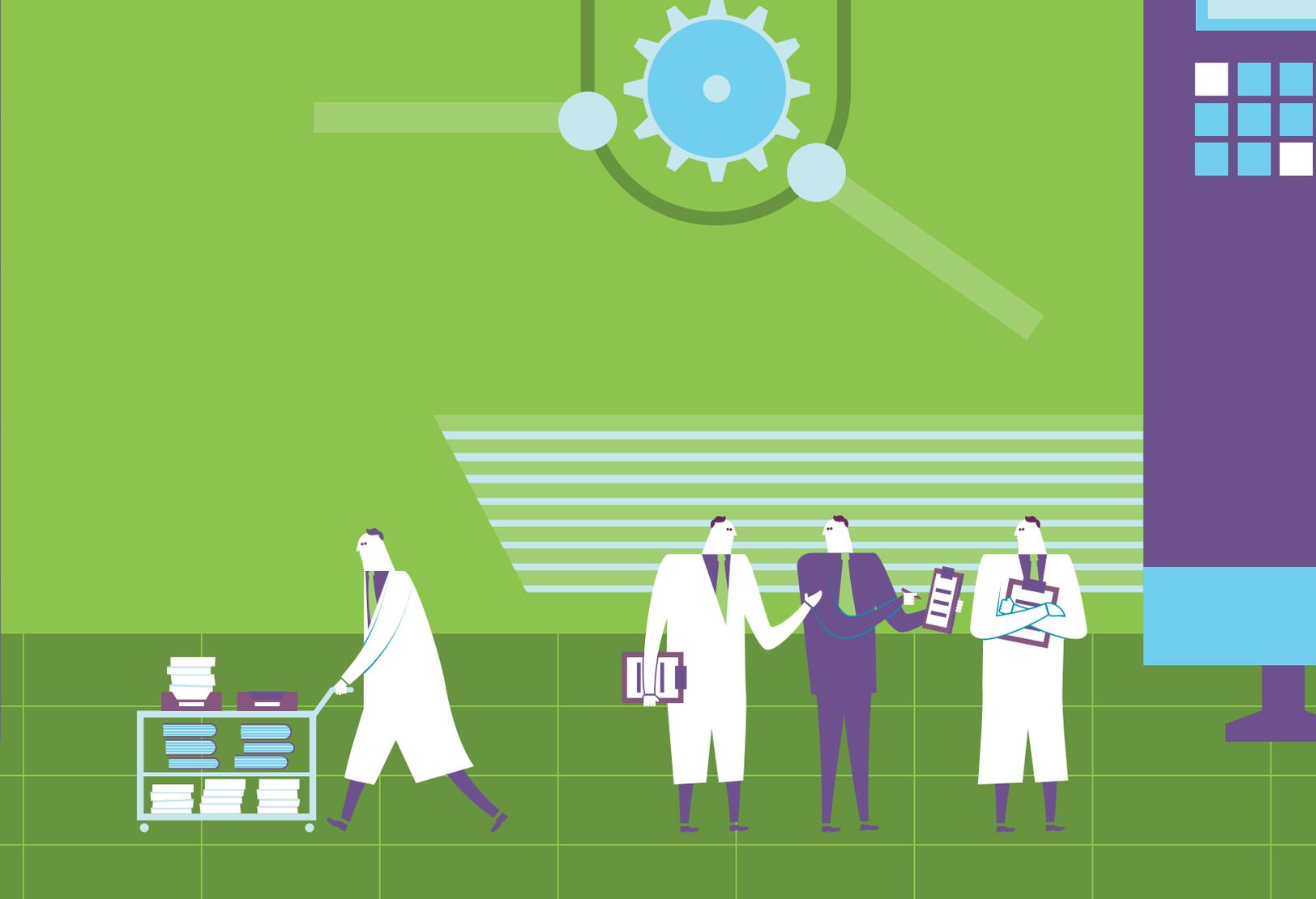
Do you let sales reps set their own prices, or do you set general guidelines and hope your reps will follow them?

Best practices say you should **set parameters** around how much a sales rep is allowed to sweeten pricing before it requires managerial approval. This way, you'll never have to worry about reps accidentally discounting beyond your lowest acceptable margin.

ConnectWise Sell Can Help You Chase Bigger Deal

Users enjoy an average deal size of 105% larger than those on a different solution.*

*Aberdeen Group, "Breaking the Laws of Physics: Shortening the Last Sales Mile through Workflow Automation," March 2013



Peer Reviewing

Who among us doesn't make a weird typo from time to time? In the professional realm, one of those tiny typos could end up costing you a lot of money. Depending on your quote or proposal, if the customer signs one your rep accidentally discounted, you could be left having to implement an unprofitable contract.

Beyond the obvious costs of typos, you also lose trust. If a customer catches the mistake, they're likely to question everything else you send them in the future.

Keep trust and increase the professionalism of quotes and proposals by implementing a peer-review process. Encourage your team to circulate their quotes and proposals before they go out the door.

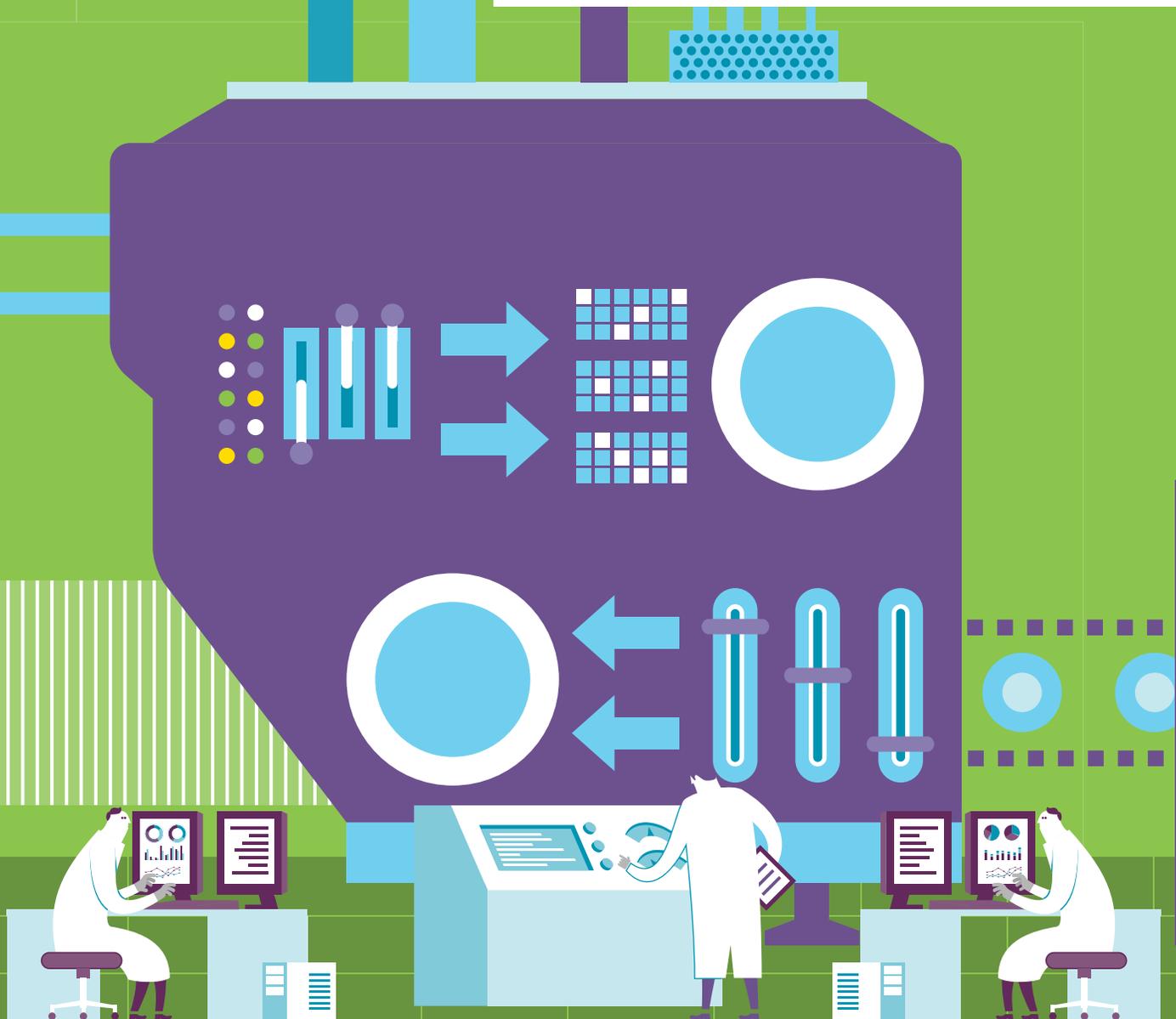
ConnectWise Sell Makes Peer Review Easy

Easily turn on workflows that enable peer review of quotes and proposals.

Instantly Updating Your CRM

Traditionally, managing sales pipelines has been a nightmare. Your sales reps privately track their potential sales, and you never have any idea where you're actually going to land. You just have to take their word on everything, which leaves you vulnerable to getting hustled or missing your overall sales goal entirely.

Don't rely on sales reps to update your CRM! Leverage technology to do it automatically. Get your data in the system, in real time, without extra steps for your reps. To achieve this, make sure mission-critical applications are integrated so you can update and see everything about your business in one place.





ConnectWise Sell Templates Make Upselling Simple

These templates are interactive, so a customer can dynamically change quantities, select all the add-ons they desire, and then immediately sign and approve the adjusted proposal. No more back and forth!

Easy Upselling

How does your team handle quote changes today? If you're like most companies, your sales rep has to go back into the quote and manually change quantities, and then resend it to the customer. It's a slow processes that requires a new document to be sent every time the customer has a change.

There's a Better Way

Give prospects meaningful choices like good, better, best scenarios all within your original quote. Product description and benefits can be automatically pulled in from a distributor. And customers can dynamically edit their desired options or quantities without sales rep intervention.

With upselling that painless, your sales reps can confidently tackle their sales goals.

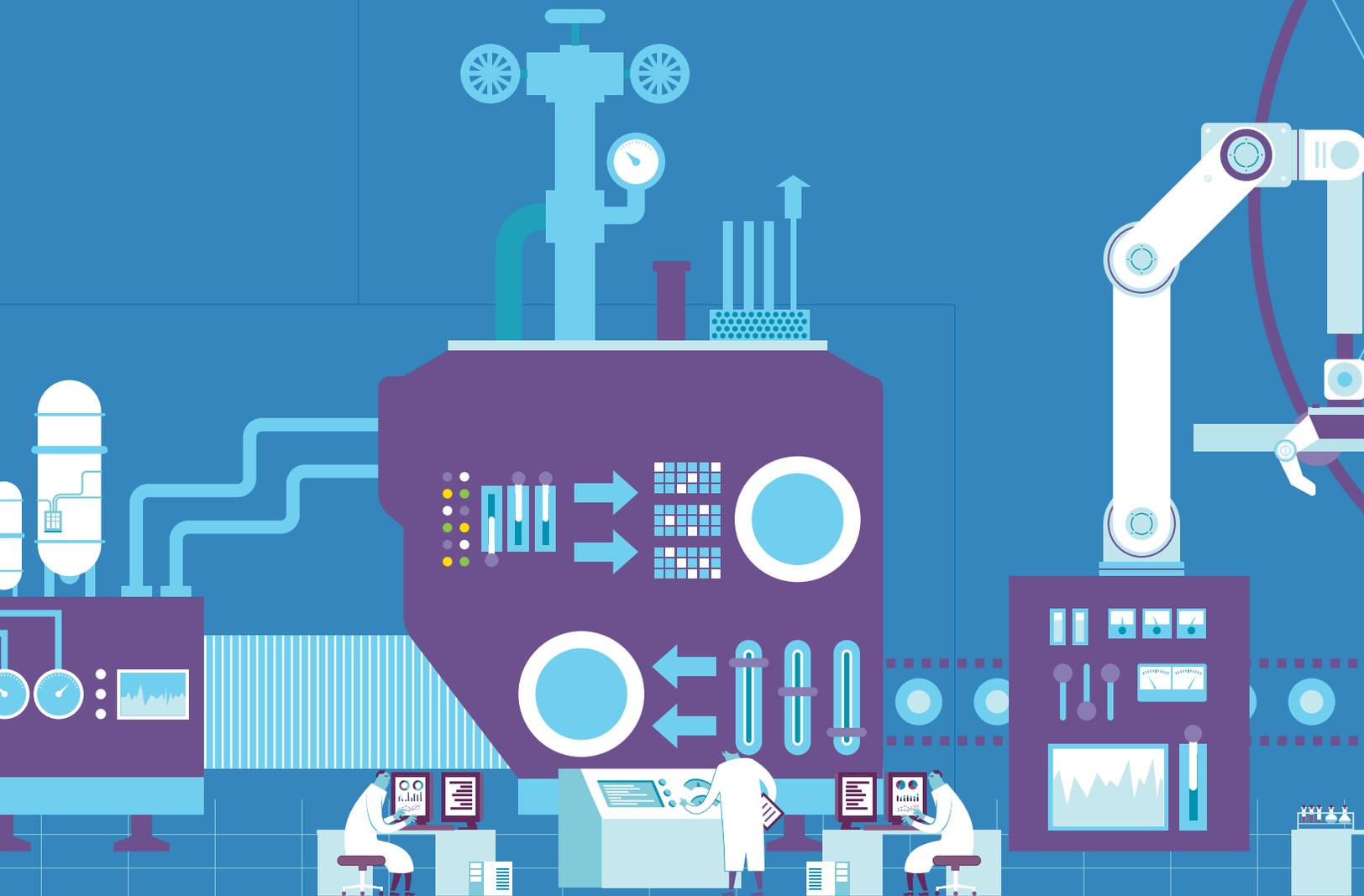


Conclusion

Thousands of leading technology companies choose ConnectWise Sell to automate much of their sales transformation process. Its scalable, easy to use, output is accurate and professional, and it drives efficiencies within user businesses so you can win deals faster—truly transformational!

PART
2

Accelerate



In [part 1](#), we discussed why automation is the cornerstone of sales transformation.

Now, we'll turn our attention to sales acceleration.

50% of sales go to the first salesperson to contact the prospect. If you follow up with Web leads within 5 minutes, you're 9 times more likely to convert them.*

Ready. Set. Go.

If you've implemented the business automation we talked about in [part 1](#), you're more than ready to rev your sales engine.

Today's consumers are savvy, and competition is fierce. Speed is the name of the game, and prospects expect timely follow-ups. If you can't get to your prospects in less than 24 hours, someone else can!

In the rest of this guide, we'll talk about:

1. Leveraging Templates
2. Searching, Comparing, Quoting
3. Utilize Integration
4. Instant Online Delivery
5. Knowing When to Follow Up
6. Making it Easy to Say 'YES'
7. Gamification

*insidesales.com



**ConnectWise Sell
has a huge library of
customizable templates.**

Choose as many as you'd like, and easily tailor them to present your brand in the best light possible.

Leveraging Templates

Reinventing the wheel every time you need to send a quote wastes time. And having multiple reps with unapproved versions of your quoting template makes for a branding nightmare.

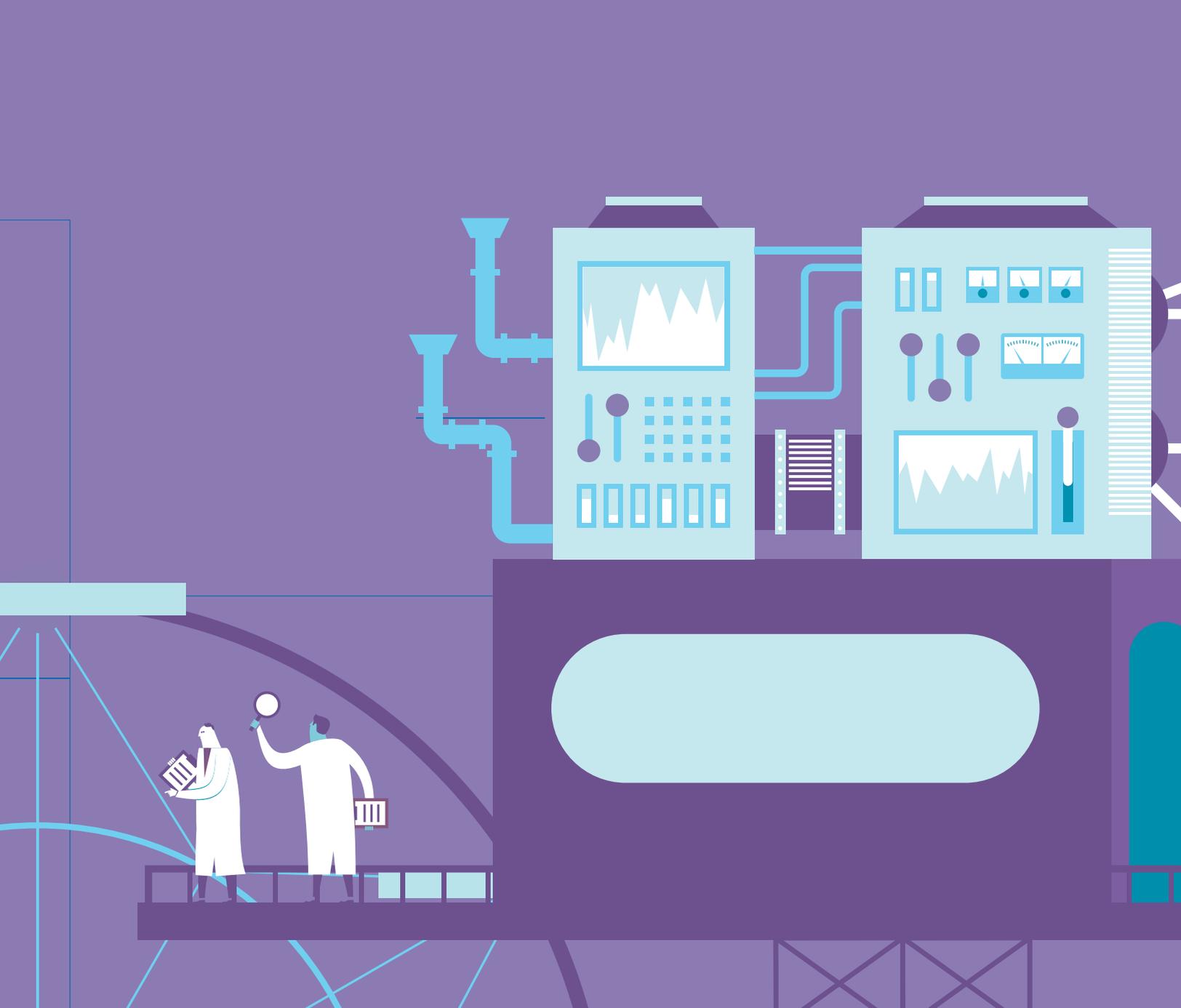
By selecting a quote and proposal automation solution that gives you templates you can customize and then lock down, you can start to gain efficiency and ensure a consistent brand image for your company.



Searching, Comparing, Quoting

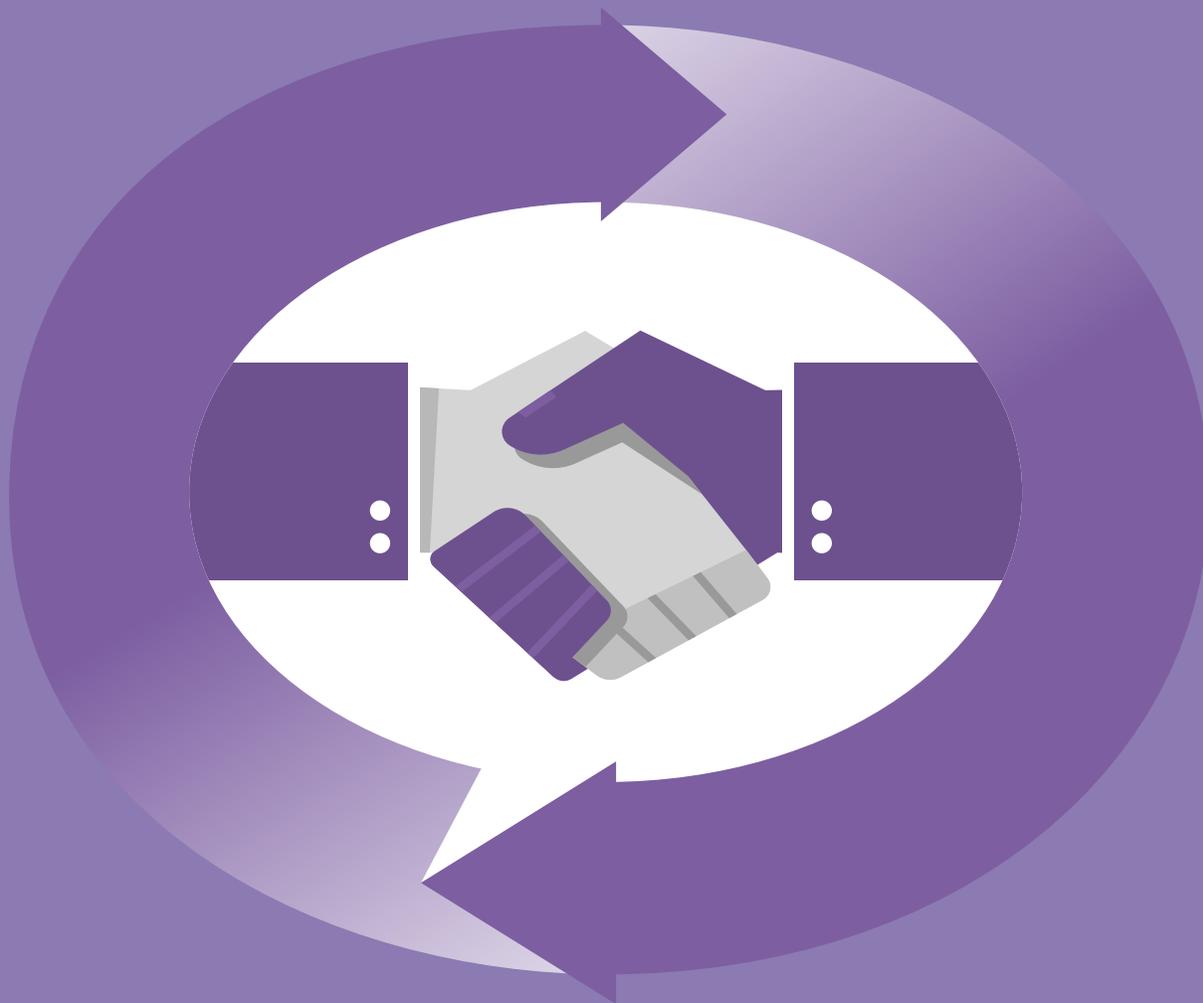
It can be as easy as 1-2-3. Smart proposal platforms give you the opportunity to search for real-time distributor pricing, compare side by side, and send proposals—all without ever leaving the platform. This dramatically shortens the amount of time it takes to get quotes out the door.

ConnectWise Sell integrates with top distributors like Tech Data, Ingram Micro, Synnex, and more. You'll never again have to find or compare pricing outside of your quoting tool.



Etilize Integration

Make your life much easier by adding Etilize. This tool provides you with the rich product images and details that close deals. Your prospects won't have to imagine the solutions they'll receive because you can show them exactly what to expect.



Knowing When to Follow Up

If your quotes and proposals are totally trackable (like we mentioned in the last section), your reps will know exactly when to follow up on quotes. They can see when, how many times, and even locations of people viewing the quotes.

ConnectWise Sell tells you when prospects view quotes so that you can follow up at just the right time.



Making it Easy to Say 'YES'

Manual signature processes slow down (and can even lose you) business. As we mentioned above, 50% of deals are won by the first responding sales rep. Speed is of the essence. And the fastest way to get quotes and proposals approved is through e-signature.

You'd be amazed at how many companies don't even have fax machines anymore, or are too mobile to sign and send back quotes efficiently. Many of the top e-signature users cite up to a 500% reduction in the amount of time it takes to close a deal. Adding an e-signature tool is a quick and easy way to dramatically reduce your sales cycle.

Because we know how important e-signature functionality is to your success, it's built right into ConnectWise Sell. **Not an upgrade, not an add-on, it always comes standard.**



ConnectWise Sell has gamification tools built right into the platform.

Sales reps can compete for daily, weekly, monthly, and even long-term awards and bragging rights.

Gamification

Competition speeds up sales! Sales reps are naturally competitive and thrive on rewards and recognition. By having a rewards system built right into your quote and proposal automation solution, you'll give sales (and sales reps) the boost you're looking for. When reps compete, **YOU WIN.**

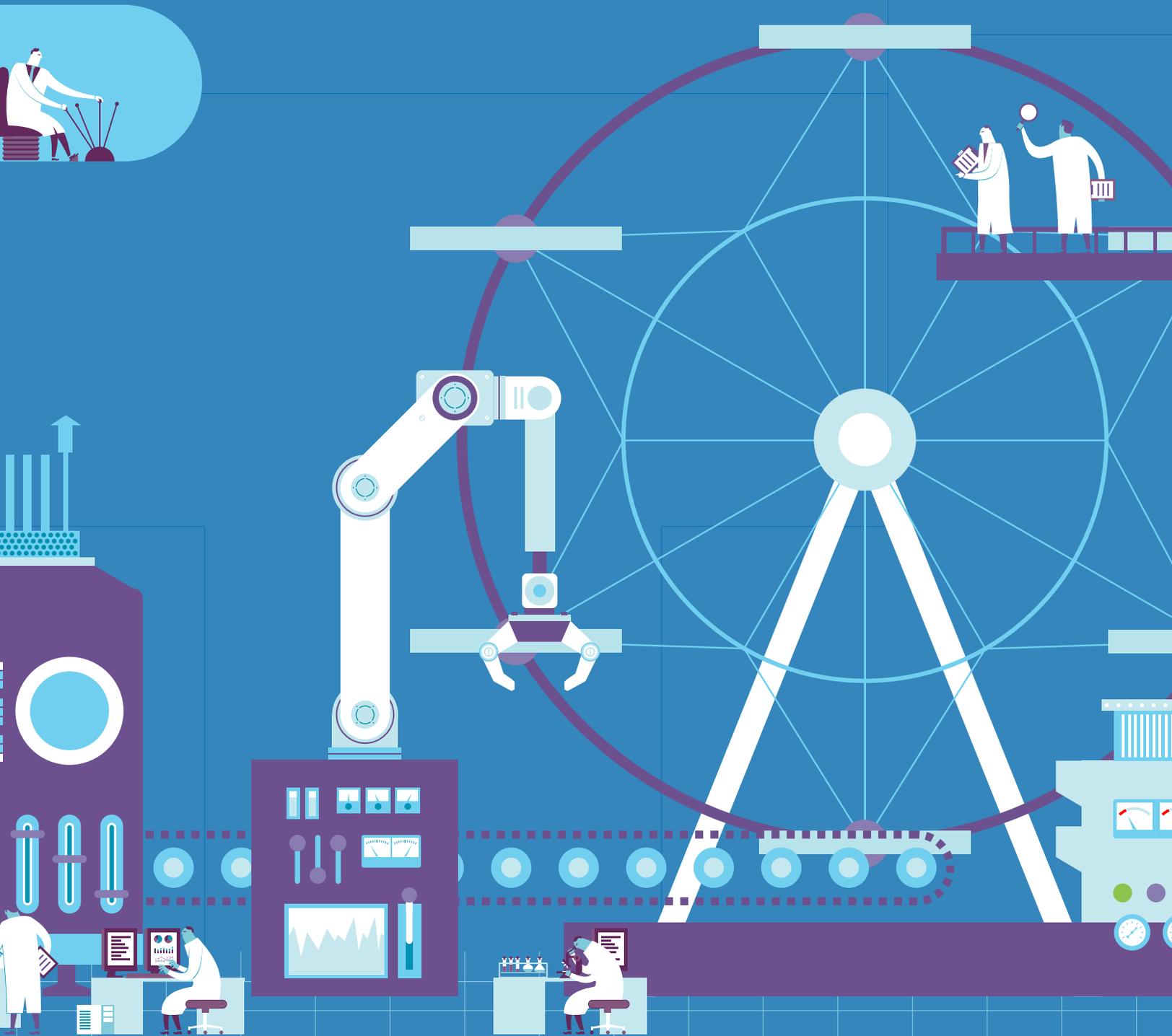
Conclusion

Sales acceleration can be quick and easy. From templates and live pricing feeds to online delivery, actionable notifications, and gamification, ConnectWise Sell delivers truly transformational sales tools.

By putting the ConnectWise Sell sales transformation platform to work in your sales organization, you'll immediately gain the benefit of built-in industry best practices—to keep your sales team motivated. Customize features to meet your specific needs, and you'll be a speedy selling machine in no time!

PART
3

Mobilize





In part 1 and part 2, we discussed why sales automation and acceleration are vital to growth.

Now, it's time to talk mobility. And in upcoming sections, we'll show you how to impress your clients and better manage sales.

A World On the Go

We live in a mobile world. Everything can be taken on the go. Work. Phones. Computers. No one sits at a desk all day. And even those of us who spend most of our days in the office bring laptops, tablets, and other mobile devices to meetings.

To stay productive, you have to empower your team with mobile business solutions. Customers expect you to deliver, and fast.

As we talked about in part 2, the fastest quoter typically wins the deal. By giving your team mobile access to your sales management solution, quote and proposal automation solution, and anywhere visibility to the status of open quotes and proposals, you empower them to respond faster and win.

In the rest of this guide, we'll talk about:

1. Gaining Mobile Access to Your Sales Management Data
2. Quoting on the Go
3. Keeping Your Team in the Loop
4. 70% of sales organizations using tablets are realizing a positive ROI.
5. Sales Management Association: What's on Your iPad?



Gaining Mobile Access to Your Sales Management Data

Everything in your business needs to integrate with your sales management solution. Because when it does, you eliminate the need to enter information into multiple systems. No more duplicate data entry. Being able to access your sales management solution from anywhere (at any time) is vital to keeping up with your business demands.

By selecting a quote and proposal solution that's designed to work with your sales management solution, you'll create a central database everything can funnel into.

You can give your reps mobile access to your sales management solution by choosing one that has a cloud-based option. This way, regardless of where your reps are, they can update customer information. Make it a best practice to have reps check customer service request logs while on-site at client locations.

For instance, while at a client site to solve problem A, your tech can log in to your sales management solution, review all other open service tickets, and identify solutions. Problems B and C might require installation of additional hardware, at an additional cost. Your on-site rep can easily begin the process of quoting this out while he's on-site with the client.



Quoting on the Go

It's a best practice to equip your sales team with mobile sales solutions, so even if they're on-site with a client, they can quote, propose, and close.

Picture this. Your top sales rep just wrapped up a big, on-site proposal presentation at client X. And just as she's about to hop in the car and make the drive back to headquarters, she gets an urgent call from client Y. They need a large order in a very short amount of time. And if your rep can't respond quickly, they'll start looking elsewhere.

If your rep has a mobile friendly quoting solution, she can immediately log in and deliver several options (at several different price points) before even leaving customer X's parking lot. With built-in e-signature capabilities, the customer can review and select their desired options in record time.

It's a win-win. You come through for the customer—and make a sale—all without ever setting foot in the office.

As a totally cloud-based solution, ConnectWise Sell **can go anywhere you do.** Near (or far), you can quote, propose, and close.

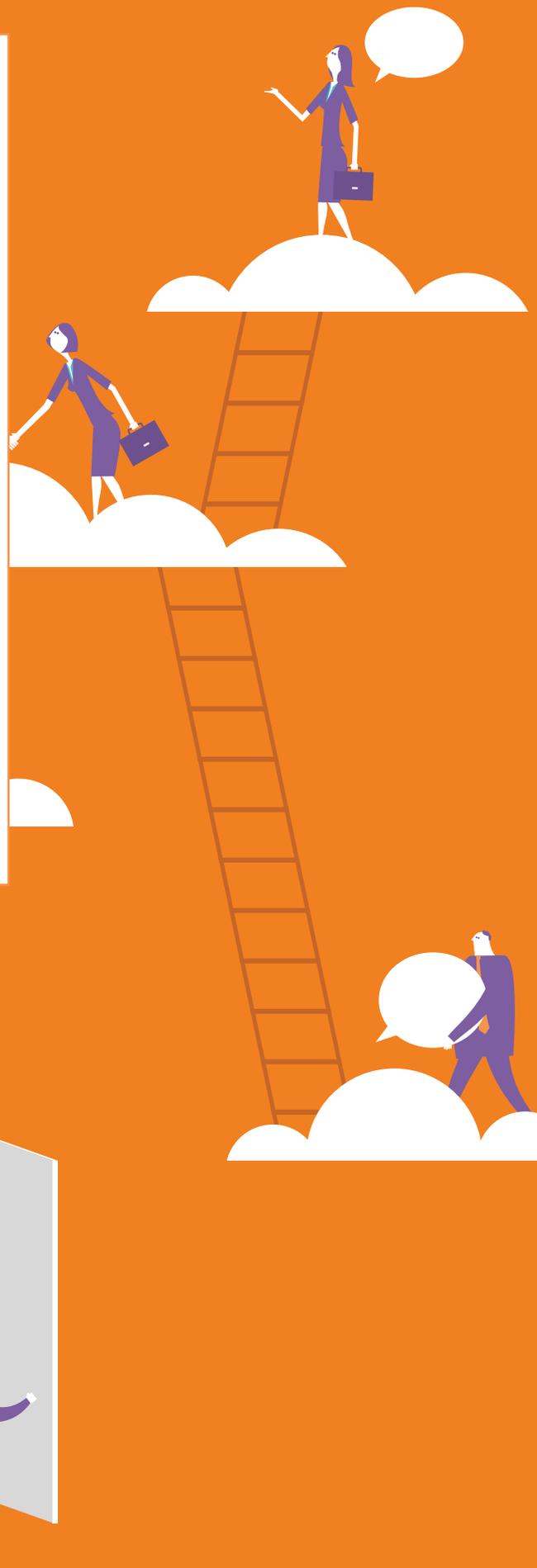
Keeping Your Team in the Loop

A solid quote and proposal automation tool will enable you to make sure everything is okay while you're away. If you're like most business execs, you worry productivity will stop when you walk out the door to take a vacation. It doesn't have to.

If you have a total quoting solution, you can make sure deals you were working get reassigned to reps who will be in the office, and you can be cc-ed on every communication sent. This way, you can keep an eye on big deals, and make sure everything meets the quality standards you've set for your company.

You can even take it a step further by reviewing a snapshot of your entire sales pipeline. At a glance, you'll be able to see what's fine and what needs attention, so you can quickly follow up with the assigned sales rep. No more digging, just everything you need to know, so you can actually relax on your vacation rather than worrying about how your business is running while you're away.

ConnectWise Sell is designed to give management anytime visibility to the entire sales pipeline.



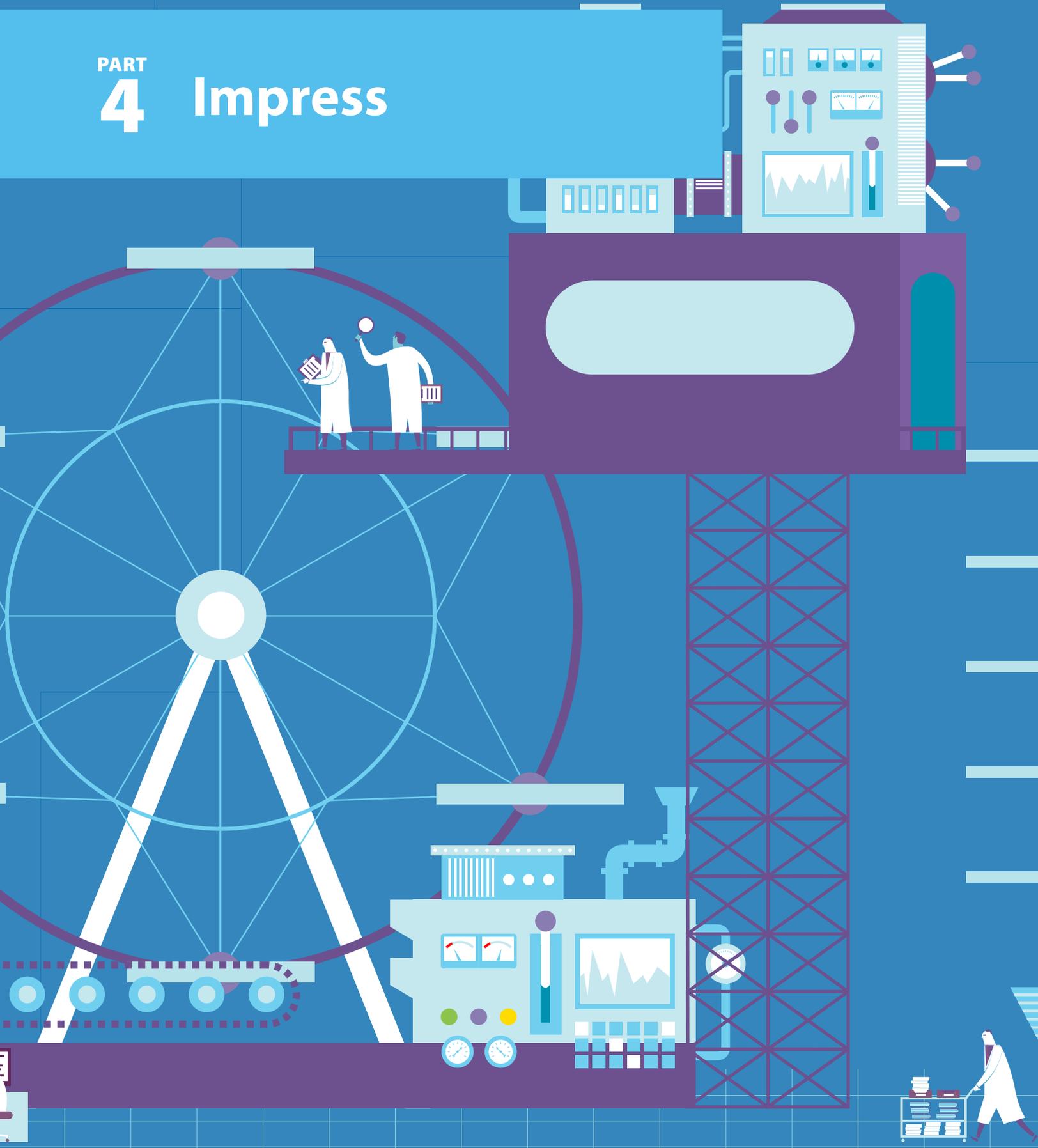


Conclusion

In a nutshell, you'll gain much greater business efficiencies by providing your team with mobile access to your sales management solution. Your team will be able to quote on the go, and you'll be able to keep them in the loop while you're away from the office. You can achieve all this, and more, with a quote and proposal automation solution.

PART

4 Impress



In [part 3](#), we discussed how mobility helps you secure more deals. And in [part 1](#) and [part 2](#), we explained the value of automation and acceleration.

Now, it's time to talk about making a great impression.

Dress Your Proposals to Impress

Sales is a marathon. The quote/proposal process is your sprint to the finish line. You need to make the **BEST** impression possible. A winning impression creates a sense of trust with your prospect, removing a major purchasing barrier. And, it gives you a leg up on your competitor.

Sometimes deals are lost simply because a quote looks sloppy. Poor presentation value, mistakes, and failure to include product images all make you look small, and maybe even incompetent.

When a customer is going to make a large investment with you, they need to know they're working with a company that values precision. A quote and proposal automation solution like ConnectWise Sell can help you look more professional, be more accurate, and leave the right impression.

In the rest of this guide, we'll talk about:

1. Why Keeping in Touch Matters
2. How Timely Quotes & Proposals Win
3. How Staying Error-Free Helps You
4. What Impresses Clients

Sales management solution users enjoy a 17% higher lead conversion rate.*

*Aberdeen Group, "Breaking the Laws of Physics: Shortening the Last Sales Mile through Workflow Automation," March 2013

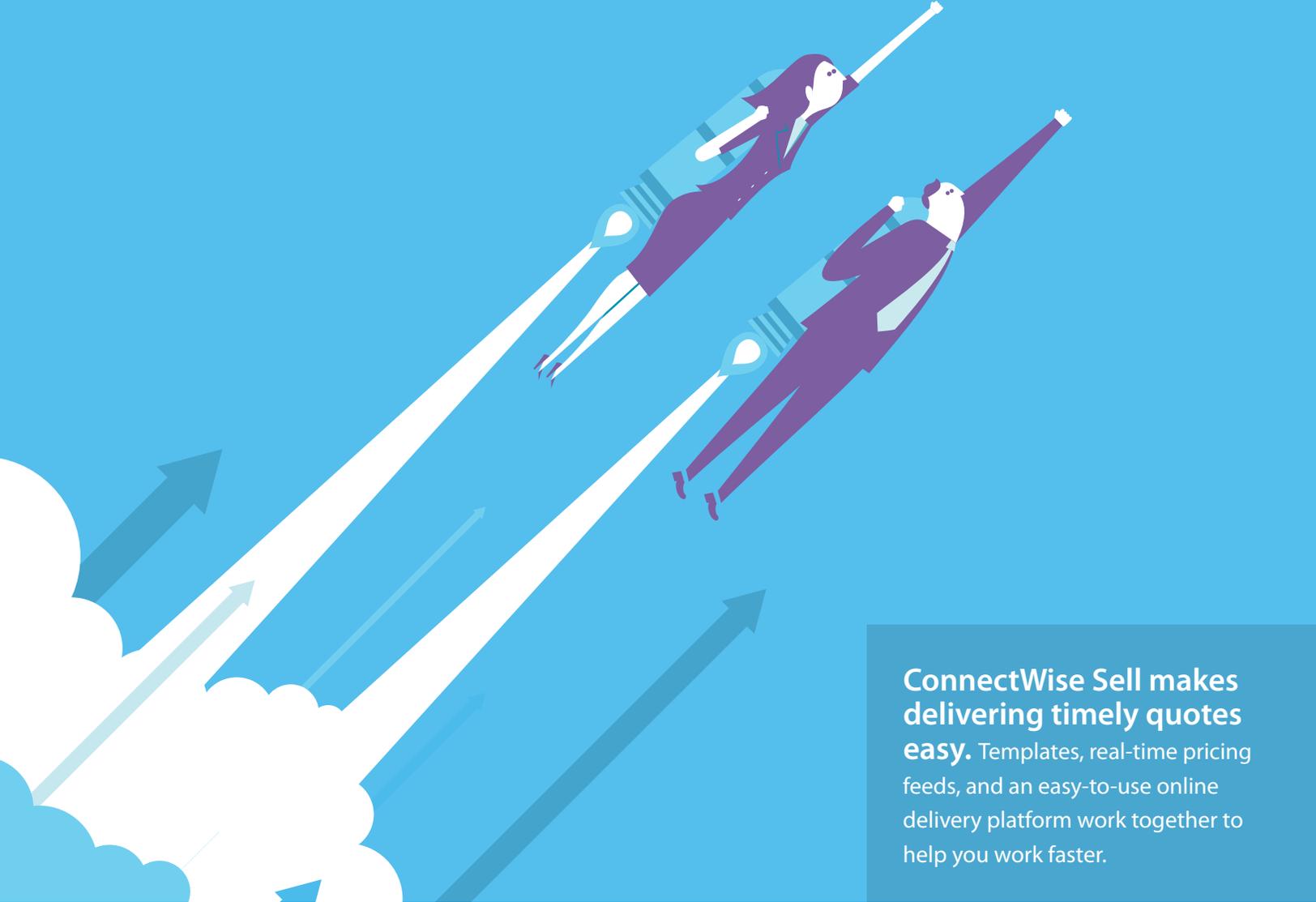


Why Keeping In Touch Matters

A well-planned sales process should include several communication checkpoints with the prospect. This provides an opportunity for the prospect to voice concerns, and it provides an avenue for your sales rep to discover the roadblocks standing between you and the signed contract.

By having an automated quoting platform that reminds your reps when to follow up, they're much more likely to contact the prospect at key decision points, giving your company a much better chance of winning their business.

ConnectWise Sell's SuccessList™ keeps your reps winning by reminding them when to perform key activities in the sales cycle.



ConnectWise Sell makes delivering timely quotes easy. Templates, real-time pricing feeds, and an easy-to-use online delivery platform work together to help you work faster.

How Timely Quotes & Proposals Win

Has a contractor or repairman ever said they would send you a quote, but the quote never arrived?

How did that make you feel?

Did they get the job?

With a quote and proposal automation solution, you can keep your word and follow through in minutes or hours to build customer confidence and increase your chances of winning.



How Staying Error-Free Helps You

By eliminating quoting errors, you reduce your risk and increase your chances of making a great impression.

With a quote and proposal solution, your contact info is pulled straight from your sales management solution, so it's always up to date and correct. If your solution is integrated with Etilize™, you can even provide your clients with rich product data. Then, you can take it one step further by embedding your own pictures or videos.

“One of the main reasons we created ConnectWise Sell is because we saw firsthand how a manual quoting error made by a sales rep led to a \$100,000 loss.”

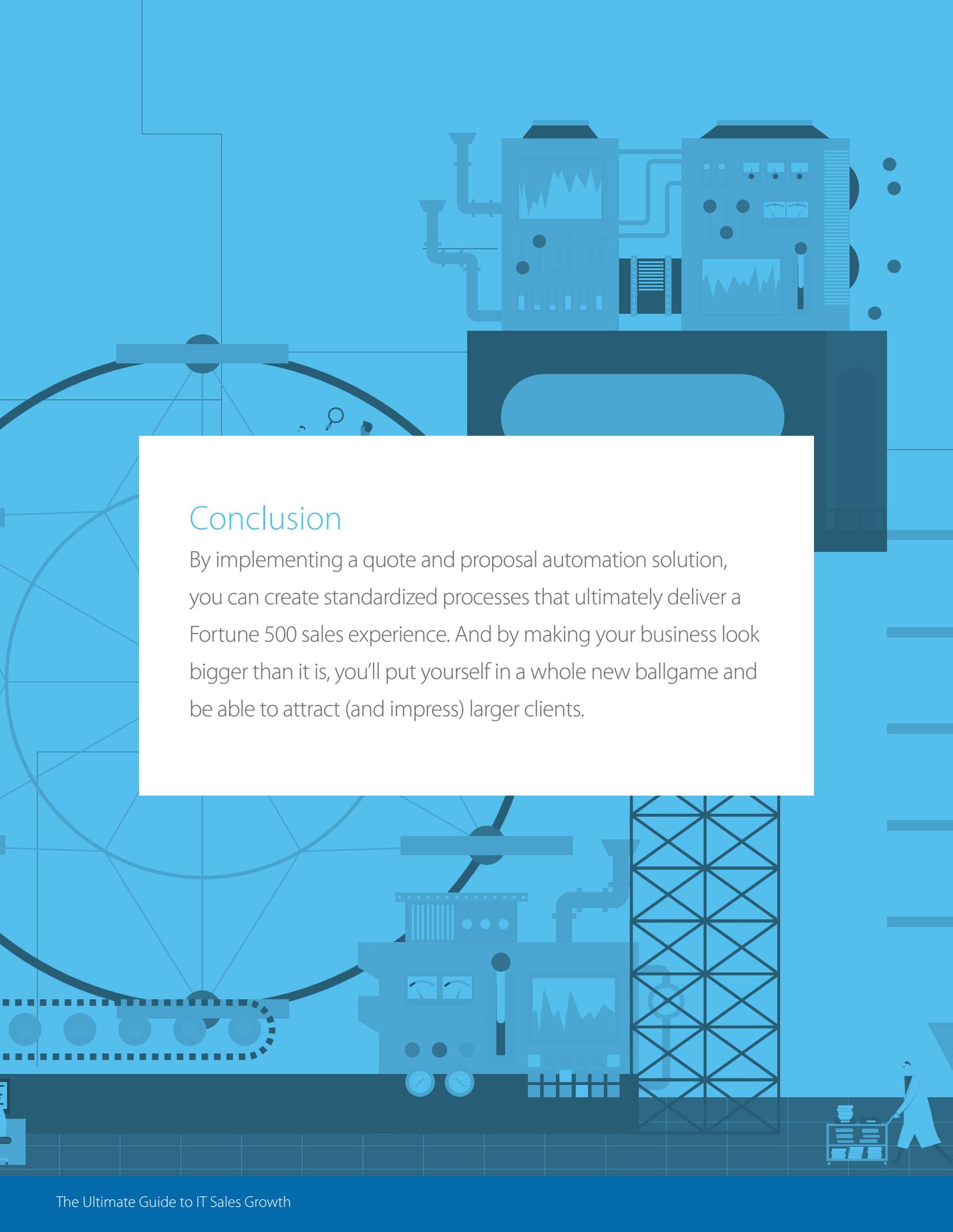
– Stephen Yu, Co-Founder ConnectWise Sell



What Impresses Clients

Clean, timely, easy-to-understand and customize quotes impress prospects. And by delivering your quotes online via an interactive portal, you can look like a million bucks. Attach images and product descriptions, so there's never any confusion about what your client is purchasing. Plus, with a built-in e-signature tool, you can make it super easy for customers to say 'YES!'

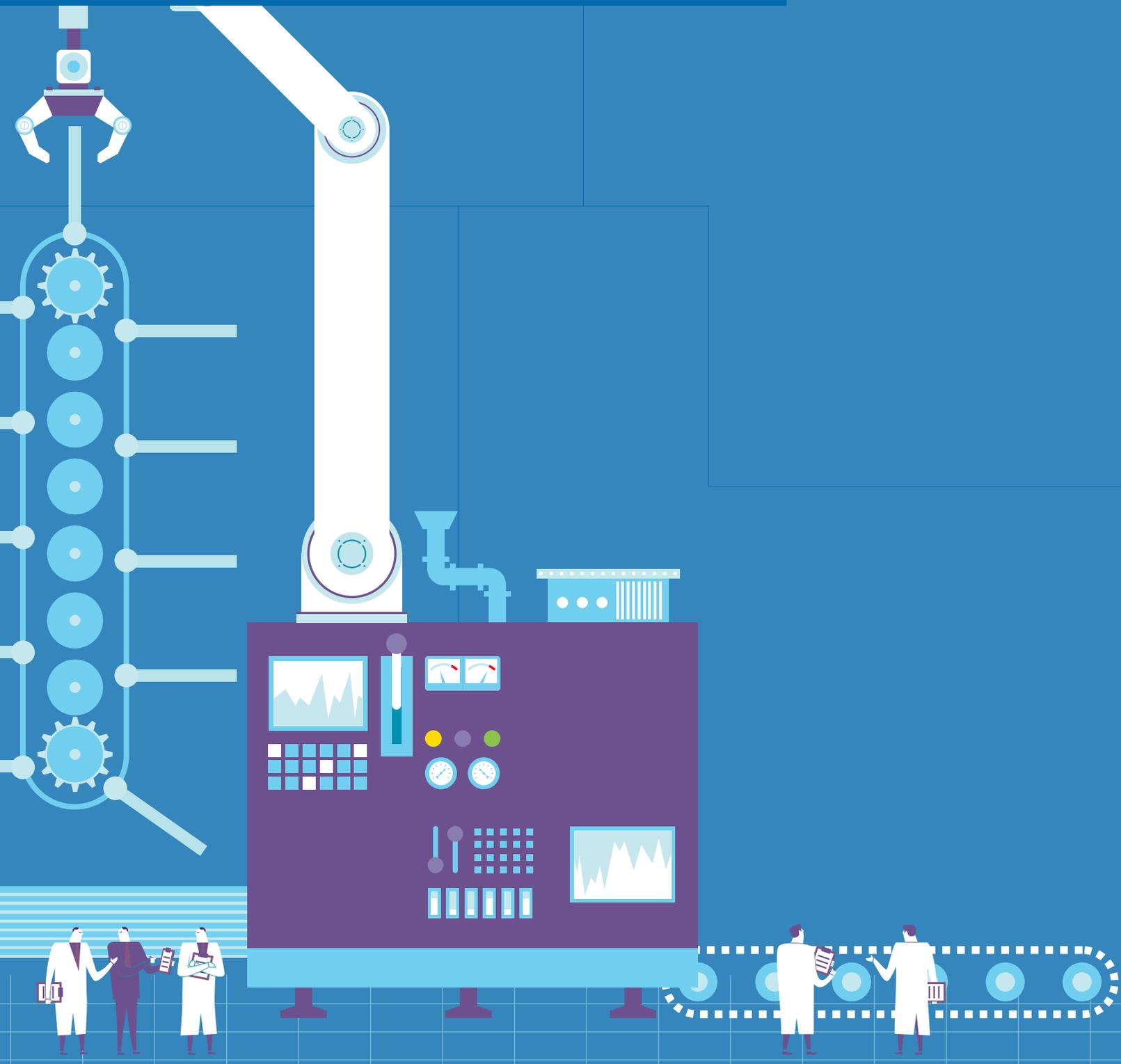
Sell's OrderPorter™ enables you to deliver quotes via a custom URL. Clients can change quantities, upsell themselves, and immediately approve with built-in e-signature.



Conclusion

By implementing a quote and proposal automation solution, you can create standardized processes that ultimately deliver a Fortune 500 sales experience. And by making your business look bigger than it is, you'll put yourself in a whole new ballgame and be able to attract (and impress) larger clients.

PART
5 Manage





Welcome to the final leg of The Ultimate Guide to IT Sales Growth!

We've talked about the importance of automation, acceleration, going mobile, and making a great impression.

Now, it's time to show you how to manage it all.

Manage to Win

To be an effective manager of a thriving sales team, you need instant insights into your team's activities. By driving your decision making with data, no one will suffer in silence or sweep big mistakes under the rug. You'll be able to see everything in real time, and effectively mentor your team based on the activities you see them perform.

In the rest of this guide, we'll talk about:

1. How to Win More
2. Keeping Reps Accountable

Teams that use a sales management solution enjoy a 26% boost in the number of reps who achieve quota. *

*Aberdeen Group, "Breaking the Laws of Physics: Shortening the Last Sales Mile through Workflow Automation," March 2013

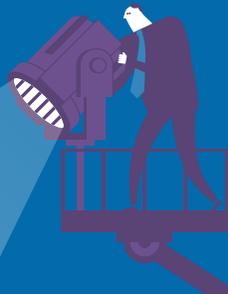


How to Win More

What if there was a way to make sure every quote was created and delivered by following industry best practices?

Managers can help you do this, but only if they're empowered with the visibility to see how things perform in real time. By guiding reps through key best practice areas for quoting and proposing, you streamline the entire sales process, create a consistent end product, and ultimately make it possible to send out more quotes. And often, sending more quotes leads to **higher returns**.

ConnectWise Sell's SuccessList ensures your sales reps hit key milestones in the quoting and proposing process, and it gives managers real-time visibility to every opportunity.



Keeping Reps Accountable

It's hard to drive accountability to any process when you don't know where it's breaking. By choosing a quote and proposal automation platform, you can eliminate the chaos, set clear expectations, and increase visibility to process breakdowns.

To eliminate these breakdowns, you need visibility-enhancing tools that enable you to copy managers on every quote your company sends, peer review, require approvals for pricing that falls under certain margin thresholds, and automatically push opportunity updates into your sales management solution.

ConnectWise Sell is designed to put checks and balances in place to ensure your sales team is efficient and profitable.

Conclusion

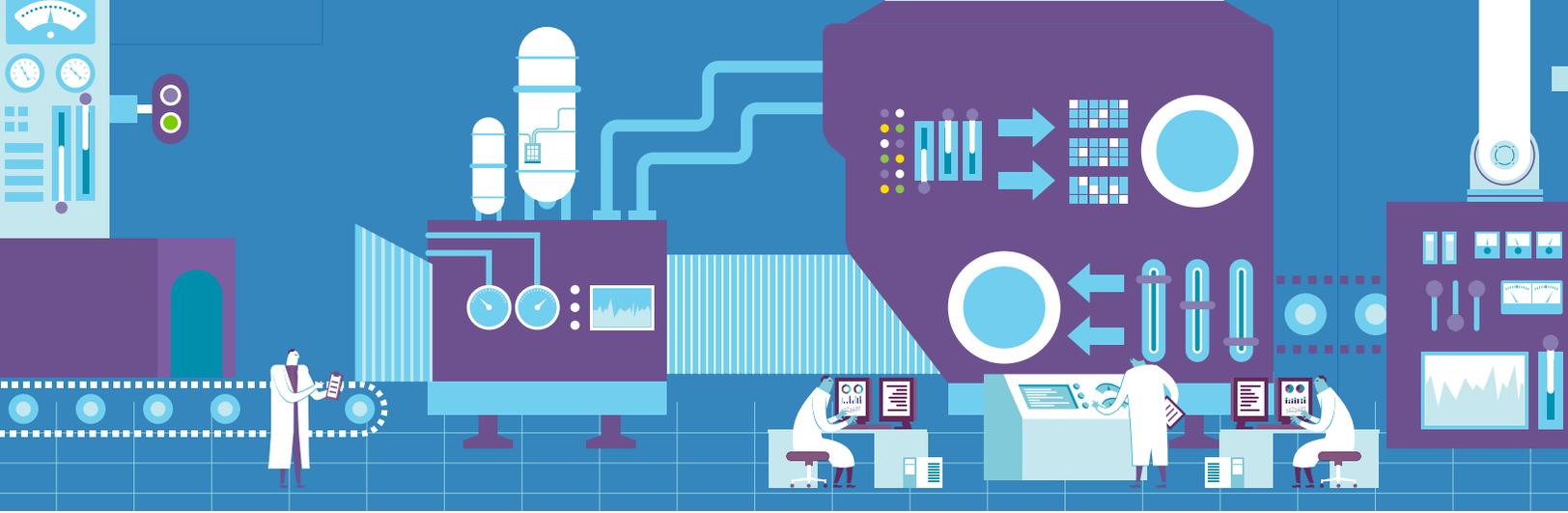
With the right tools, you can conquer any sales workflow obstacles. By improving sales manager and rep visibility to opportunities, you'll be able to more effectively delegate and follow up on leads. And, you'll be able to drive accountability to goals. In business, visibility is the first step toward profitability. Empower your team with the insights they need to achieve the goals you set.

Congratulations!

You're 5 steps closer to transforming your sales process.

We hope you'll continue to use these five installments as a reference guide to help you with your sales transformation.

1. Automate Processes
2. Accelerate Sales
3. Mobilize Your Sales Team
4. Impress Clients
5. Easily Manage the Entire Sales Cycle



Create Quotes & Proposals Anytime, Anywhere »

ConnectWise Sell is a quote and proposal automation solution designed to help you get quotes out the door and profit into your business. Generate professional quotes anytime, from anywhere, and track the results immediately. Take advantage of unparalleled business intelligence for full visibility into your sales process, and keep your sales cycle short and strong. Sell makes it easier and faster than ever for your sales team to generate professional, accurate, timely quotes and proposals. Our innovative tools help maximize your chances to win every quote and proposal, as well as providing a constant stream of micro-rewards that continuously recognize your sales team's efforts.



Take Control of Your Sales & Marketing Efforts »

Create opportunities, manage leads, and maximize your sales with the sales and marketing tools inside ConnectWise Manage. Even if it's not your area of expertise, you can enhance your sales and marketing to help keep your business growth on track and above expectations. Stay on top of sales opportunities, with full and constant visibility into your pipeline. Bring in new leads with customized, professionally created marketing campaigns, and track every action on the campaigns to best allocate your efforts and resources. Once the sale is made, keep handoffs to project management seamless and simple.



About ConnectWise

ConnectWise transforms how technology solution providers successfully build, manage, and grow their businesses. Offering a comprehensive set of award-winning solutions that deliver a seamless, simple user experience, ConnectWise gives its partners the ability to increase productivity, efficiency, and profitability.

Just as importantly, ConnectWise's relentless commitment to innovation and unparalleled passion for partner success assure its partners have comprehensive business support through every step of their journey. Today, more than 120,000 users in over 50 countries take advantage of the competitive edge that comes from ConnectWise solutions and its powerful network of ideas and experts. For more information, visit www.ConnectWise.com or call 800-671-6898.