



BOOM!

THE LEGIT GUIDE TO SALES ENGAGEMENT

WHAT'S INSIDE

Acknowledging the Elephant in the Room	3
Key Risks of Investing	5
Four Core Competencies	6
Diving Deeper into Detailed Features	9
Conclusion	17

ACKNOWLEDGING THE ELEPHANT IN THE ROOM



“The average tenure of a sales leader is 19 months.”

— Sales Benchmark Index

Let’s acknowledge the elephant in the room: even the best sales leader is still a single person, not some kind of commission magician. No matter how many spreadsheets you make or how many Tony Robbins podcasts you download, today’s sales workload is too much for any single person to handle. In fact, research shows that 50% of salespeople will miss their number this year. So let’s take a collective breath and acknowledge the truth: there’s just no way any one person can manage today’s sophisticated sales funnel and pipeline without significant assistance. Sales engagement platforms are a cutting edge solution to these formerly insurmountable sales challenges.

Learn more about sales engagement platforms ...

GET A DEMO

Sales Engagement Platform Definition:

Sales engagement platforms accelerate the sales process by empowering salespeople to analyze, personalize and prioritize their communications and activities across all key channels.

Key Risks of Investing In a Sales Engagement Platform

- What if you buy a software that isn't compatible with your current systems?
- What if you overlook some obvious detail when vetting the product?
- What if you purchase a software only to find your reps rebel because they hate it?
- What if the new software turns out to be more work than just doing it yourself?

Don't worry; we have your back. At Outreach, we've advised thousands of companies on their sales engagement journey—we know the pitfalls, what to look for, and what you demand, and what you should be excited about. Like anything, it comes down to due diligence. Here are the table stakes any sales engagement platform should have. The vendor needs to demonstrate that not only does the capability exist, but it's as feature-rich and well-developed as you need it to be.



“Don't worry;
Outreach has
your back.”

52% *of sales leaders plan to purchase a sales engagement platform.*

— Forrester

Four Core Competencies Any Sales Engagement Platform Must Have

If you do decide you want to buy a software engagement platform, what should you look for? While purchasing a new software ushers in exciting possibilities, there are also potential risks.

— **Systematic engagement.** Persistence beats resistance. You have to follow up with your prospects if you want them to grow from a prospect to a lead to a sale. But who has the time? This is where systematic engagement comes in. Sales engagement platforms make it possible to systematically follow up with prospects throughout the entire journey—from landing the first meeting, to re-engaging the decision-maker whose gone dark, to rallying the next group of people who need to review your proposed launch plan. Systematic engagement has another powerful benefit that any sales leader will appreciate—it is a forcing function for sales best practices. Because sales engagement platforms enable systematic outreach, your reps will all be on message and aligned around your vision.

— **Integrated Meetings Support.** The whole reason you're calling, emailing, and otherwise engaging with your prospects is to — you guessed it — book more meetings. Rather than settling for a solution that leaves you high and dry once your prospect agrees to meet, insist on an SEP that helps you schedule, manage, and follow up on your meetings. Some must have features include: calendar integration so you can book and reschedule meetings with one click (for yourself or on behalf of others), reusable meeting templates, and the ability to insert scheduling links or available times to meet in just one click.

When you add all of these features into the workflow of a Sales Engagement Platform, you get not only the convenience of an all in one solution, but the magic combo you need to increase your meeting show rates with intelligent automation and a better workflow. It's official: You shouldn't give an SEP without integrated meetings functionality the time of day.

— **Activity-based analytics.** For the first time, sales leaders have data that's not just about sales results, but about sales activity. Sales managers tend to focus on pipeline and revenue, but what activity caused those outcomes? It's time to take a step back, take a break from the thirty-day cycle and really ask yourself two things: am I doing enough activity and am I executing the right activity? Which activities work best? What messages resonate? And how can you apply those insights across your prospect list to get smarter and more effective every day? Pipeline is a lagging indicator: What are the patterns that create the predictable revenue? With activity-based analytics, when something goes wrong, you know what activities to change.

“ Ask yourself three things: am I doing enough activity and am I executing the right activity? Which activities work best? ”

*Sales engagement platforms aren't about automation.
They are about personalization at scale.*

— **CRM integration.** For most sales teams, a customer relationship management system (CRM) is the backbone of the reporting engine. You need your CRM to have reliable, complete data on every deal so that you can accurately manage and forecast your pipeline. Again, delight is in the details. An SEP must not only have CRM integration, but have the depth and complexity required to run a sophisticated sales business. From updating lead status based on what's going on in the communication, to bidirectional field-to-field data sync, to protective measures in place for complete control over your data, double click on the details to make sure the platform will truly serve your needs.

— **Prospect intelligence** — Top performers do their homework. They're prepared for every sales interaction with as much information as they can gather about the people and companies they're selling to. Prospect intelligence [surfaces meaningful external insights](#) about the prospect: who are their competitors? What are they saying in their social feeds? Have they been in the news recently? A solid sales engagement platform gives you a snapshot of all historical interactions and what's happening in the present and future. With this view, your rep will know that they called a prospect three times last week, and that they should congratulate the prospect on the company's new acquisition to put a fresh twist on a fourth call.

Just because it's featured on a product comparison checklist doesn't mean the capabilities or depth are the same.

*See how Datanyze doubled revenue using
Outreach:*

[LEARN MORE](#)



“Take time to develop a strategy for emails and sequences. I highly recommend having a committee responsible. Other than that, get prepared to handle more responses!”

— Ben C., G2 Crowd Review

Think Outside the Checkbox: Diving Deeper into Key Sales Engagement Features

Those of us who are hiring managers know this phenomenon well: you interview twelve candidates who all list “Salesforce expertise” on their resume. For some, this means they know how to log in. For others, it means they can whip up custom reports and design Visualforce pages with the best of ‘em. Yet, everyone lists it on their resume.

The same phenomenon applies to software: many products will list “having” a feature, but what does that really mean? Just because it’s featured on a product comparison checklist doesn’t mean the capabilities or depth are the same. Failure to dig into the details is where a new software purchase can go downhill.. Here are a few areas to dig deep and really do your due diligence so you come out looking like a rockstar, not a rookie.

Sales engagement platforms: separating the basic from the best-in-class

1. TASK WORKFLOW AND PRIORITIZATION

With so many moving parts in a salesperson’s day, prioritization is the name of the game. A great sales engagement platform lets reps sort outstanding tasks by date, priority, or engagement, providing a truly global view of how to organize their workflow. It is not enough to be able to view the status of a single sequence; reps need to be able to see global activity in a single view. Bonus points should be awarded to those sales engagement platforms that allow reps to: filter their views, save those views, and take individual or bulk action right there.

Advice from an Outreach:

“Take time to develop a strategy for emails and sequences. I highly recommend having a committee responsible for developing best sequences. Other than that, get prepared to handle more responses.!”

— Ben C., G2 Crowd Review

Note: a best-in-class sales engagement platform still allows for personalization within these parameters, so you get the best of both worlds.

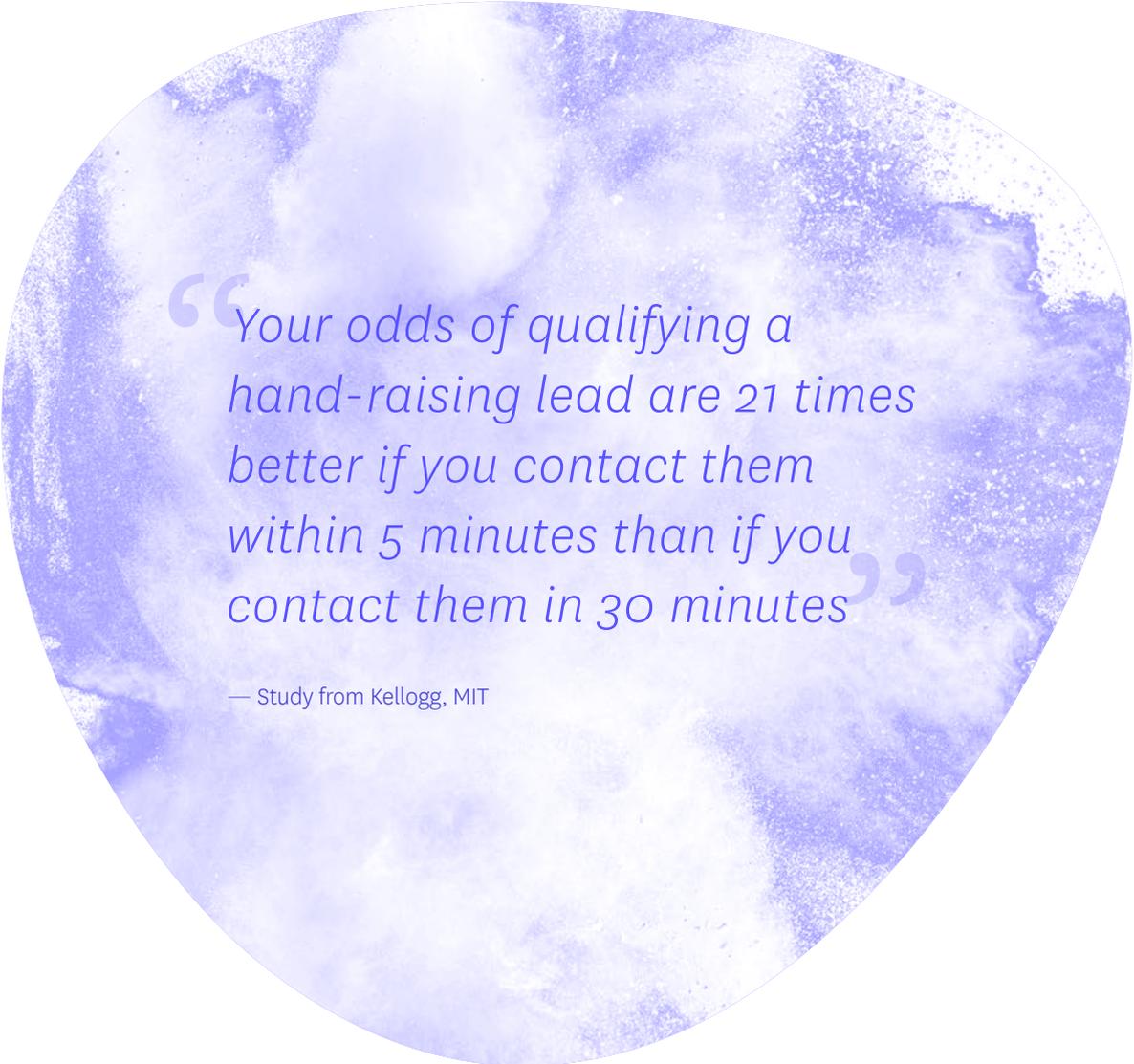
2. MASTER SEQUENCES

Sequences are engagement workflows for calls, emails, or social actions. Master sequences allow sales leaders or others to share their best-performing sequences - from content, to touchpoints, to safety settings-across the entire sales teams. This allows sales leaders to measure what's working and which messages and activities are most effective across the team. It also makes for efficient administration as sequences can be edited in a single place and changes automatically reflected across all users of the sequence.

3. RAPID INBOUND HANDLING.

Hey, where did that lead go? When it comes to leads, response time is everything. Reaching out to the right person at the right time is not rocket science...yet, believe it or not, not all sales engagement platforms empower reps to do so. A best-in-class sales engagement platform will empower reps to call or email a lead right away. A more basic sales engagement platform will only let reps respond at a blanket time, i.e. Sunday at 6 p.m. Can you imagine how frustrating it is to have a hot lead on the hook, only to know that because of system restrictions, you are unable to respond to them until some arbitrary time in the future?

The same principles apply to your outbound leads. Do you want a system that only allows you to prospect all of your leads Friday at 6 p.m.? This may be a great time to reach a Chief Sales Officer who's burning the Friday night oil, but what about that AE who's been a great internal champion but is well into his cups by Friday at 6-hey, it's Friday night. We don't judge. The point is, do you want your reps to be restricted to having to contact all their prospects at a batched time? No. You want to send the email or make the call at the time that works best for the individual, on a case by case basis.



“Your odds of qualifying a hand-raising lead are 21 times better if you contact them within 5 minutes than if you contact them in 30 minutes”

— Study from Kellogg, MIT

Pro Tip:

At a minimum, make sure your sales engagement platform lets reps customize their send times. At best, choose a platform with a best-time-of-day feature that lets you easily see when your prospect is traditionally most responsive—how awesome is that?!

This is one of the most common gotchas we see from frustrated customers, because people take for granted that such a simple and important feature would exist in every sales engagement platform. But it doesn't. So have your own back, and make sure you can follow up right away.

4. FREEDOM WITHOUT RISKS

On the one hand, you don't want your platform making decisions for you about the velocity and volume at which you can sell. Don't let a vendor throttle your sales by not allowing you to set the scale of automation in the way that works for you. On the other hand, you want to be prudent about not allowing your reps to go rogue or risk your IP getting blacklisted. So you want email safeguards.

Email safeguards are the seatbelts for your sales engagement platform. These safeguards do things like prevent a single account from receiving so many emails that your domain becomes blacklisted (domain-level throttling); prevent a single prospect from being contacted too frequently by ensuring they can only be in one active sequence at a time (sequence exclusivity); and ensuring that a prospect isn't put into a new sequence too soon after completing one (cool down times).

Insight from a real Outreach:

“While some software claims to do almost everything Outreach does, there is one thing that it does better than everyone else and it has saved me so many times. If I send an email to bob@domain.com, but susie@domain.com responds, it notifies me someone else has responded for Bob and stops him from receiving more emails in the campaign. It’s unbelievable how good that level of reply detection is.”

— Scott E, G2 Crowd

5. ALL-IN-ONE INTELLIGENCE

At a table stakes level, every sales engagement platform should have sales and prospect intelligence capabilities to teach you more about your prospects and leads. For a best-in-class solution, your sales engagement platform needs to take it a step further. A world-class sales engagement platform will enable reps need to surface those prospect insights in a single view without leaving your current system (hint: in technical-ese, this is called “working natively.”) Sales intelligence relies on third-party sources (LinkedIn, Twitter) to curate important and timely information about your prospects. Is that information surfaced to your reps within their current view, or do they have to tab out and thus context switch? Do you want your reps to stay focused or go down a social media rabbit hole? While it may seem like a little thing, as a manager, do not underestimate the cost of context-switching.

“Although switch costs may be relatively small, sometimes just a few tenths of a second per switch, they can add up to large amounts when people switch repeatedly back and forth between tasks....even brief mental blocks created by shifting between tasks can cost as much as 40 percent of someone’s productive time.”

— Study from Kellogg, MIT

6. CRM SMART SYNC

This is a biggie. Imagine that Ryan the Sales Ops Administrator is working in Salesforce and updates a phone number in a contact record. At the same time, Cody the Account Executive is updating the same contact record in his sales engagement platform. Which update will ultimately be reflected? What if it's the outdated phone number that gets reflected? If that happens once, it will be annoying enough. If it happens regularly, it will become a giant pain. Don't let this become your reps' reality. The magic question here is: "Does your sales engagement platform only have bidirectional syncing, or does it have conflict resolution?" Bidirectional syncing is a "dumb sync" meaning you choose one system (CRM or SEP) and say "In all cases, my CRM will override my SEP." Conflict resolution takes in a number of more sophisticated factors so that the sync is dictated by the most accurate information, not the overriding system. Boom

Pro Tip:

The technical term for smart syncing between records is "conflict resolution." These are the magic words. The wrong question to ask: "Does your sales engagement platform have bi-directional sync with Salesforce?" The right question to ask: "How does your sales engagement platform handle conflict resolution and ensure that my data remains pristine in both SFDC and my sales engagement platform?"

7. PREDICTIVE SUPPORT

A good sales engagement platform provides help when you ask for it. A best-in-class sales engagement platform gives you help before you even know you need it. This is where predictive support comes in. As the name suggest, predictive support analyzes your actively and proactively provides helpful tips and insights.

In conclusion, a best-in-class sales engagement platform does a few key things: it puts sales in the driver's seat by letting them customize when and how they reach out. It makes their life easier by eliminating typical technology hassles. And most importantly, it automates the activities that don't require a personal touch (how personal can an Outlook calendar invite really be?) to make time for the things that absolutely do: the strategic insight, the shared joke, and ultimately, the meaningful connection from one human being to another. Empower your reps to accelerate the pace of meaningful human connection with a sales engagement platform, the missing link in your tech stack. Your work life will never be the same.

“Ask about customer health scoring, maturity models, and CSAT/NPS/CES.”

[GET A DEMO](#)



outreach.io / [tweet us: @outreach_io](https://twitter.com/outreach_io) / 888-938-7356