

SALES & MARKETING POWER TOOLS

FOR SUPERSTAR SALES ORGANIZATIONS

One of the hardest areas of an organization to automate and improve with technology and process advancements has been the connection between the sales and marketing departments. The age-old complaint from sales—"These leads aren't any good"—and the counter-complaint from marketing—"Salespeople don't follow up on the leads"—are finally being addressed by the discipline of data and business rules. The truth, of course, is that marketers have delivered too many unqualified leads, and the sales department has been less than diligent in its follow-up.

But this classic conundrum also offers a substantial opportunity to improve the process by directly addressing inefficient lead management issues.

In the following pages of this month's Best Practices Guide, our experts will address how focusing on lead discipline can align sales and marketing departments more effectively.

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The Four Ps of Lead Follow-Up:

Findings from the 2015 Sales Effectiveness Report

Understanding and exercising the most effective strategies for managing your critical inbound leads is pretty straightforward. We've boiled it down to the 4 Ps: Promptness, Persistence, Personalization and Performance. Let me explain:

First, **promptness**. Once a prospect has become apparent, the faster you respond, the better your chance of making a sale. According to InsideSales.com studies, even the difference between 5 minutes and 30 minutes can substantially impact your chance of contacting and qualifying a lead.

Next, **persistence**. It's simple: the more times you try, the more likely you are to make contact with a lead. Taking the time to follow up is worth it: a Yesware study confirms that continuing to reach out even all the way to an eighth attempt and beyond will generate a higher response rate.

Is your message **personal**? The more elements of personalization you can include in an email, the more likely the recipient will open it and click through or respond—up to 137 percent more likely.

Don't discount **performance**. If an email ends up in the junk folder—as does nearly half of business email—the rest of your efforts are in vain. Graphics-heavy, link-laden emails won't get the job done.

The 4 Ps sum up what we know companies should do to engage leads successfully. But how closely do they correspond with what companies actually do?

That's the question we set out to answer in our 2015 Sales Effectiveness Report on Lead Follow-up. We commissioned a researcher to test 327 companies across nine industries to see what happens when research meets the real world. Our secret shopper sent direct, business-specific inquiries via mail or web form, and for the next 30 days we tracked each company's response time, response frequency, their level of personalization, and their ability to land in the inbox.

Our most shocking finding was that just over one third of the companies we contacted did not respond at all. Zero.

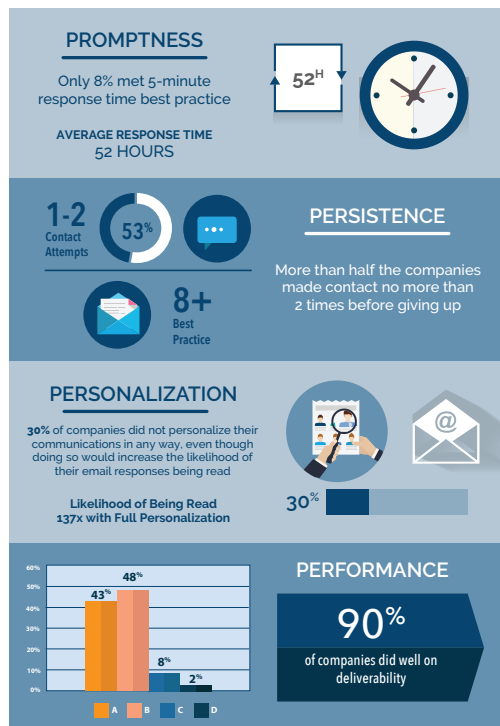
No response. A direct inquiry, a hot prospect asking to be contacted directly, was ignored by 34% of the companies contacted!

Almost as surprising is the fact that only 3% of the companies that did respond were following best practices in all four areas: Promptness, Persistence, Personalization and Performance. On the contrary:

- 38% took more than a full day to respond
- 53% made no more than two attempts at contact
- 30% had no element of personalization in their emails
- 58% were likely to miss the inbox at least 10 percent of the time

Clearly there's a disconnect here between theory and practice. And that's, unfortunately, not so surprising. We know that for many businesses keeping up with leads is a perennial struggle. We also know that there's a better way. A look at the top performers in our study suggests key steps to optimizing inbound leads:

1. **Prioritize promptness:** Even when top-rated companies didn't meet best practice levels, their response time was more than 150 times faster than the survey average. Even a small increase in response time yields a higher contact and conversion rate, so any effort here will pay off.
2. **Don't give up:** The most consistent factor among top-rated companies was their persistence. Every single one of them hit the best practices target of 8 or more attempts at contact—and yet overall, persistence was the weakest category in our study. Many companies that find repeated follow-ups challenging are turning to automation to extend their resources and capture every possible opportunity.
3. **Make it personal:** All of the top-rated companies used multiple elements of personalization in their email



communication, and all but one of them received the top score for email performance. Here again, marketing automation tools and lead capture forms can make personalization simple. More sophisticated systems can go further, interpreting the details of the inquiry and mimicking a human response.

Take a look at all the findings in the complete 2015 Sales Effectiveness Report: Lead Follow-Up. Download your own copy (<http://con.ai/2015-lead-follow-up-report>) to see which factors predict high or low performance and learn what steps to take to bring your company's performance in line with best practices. You can also visit us (<http://www.conversica.com>) to learn how artificial intelligence is being used today by hundreds of companies – including IBM, Oracle and Chrysler – to maximize engagement of their hard-earned leads.

Inbound leads are far too valuable—and too expensive—to let languish. Our 2015 Sales Effectiveness Report on Lead Follow-up can help you find ways to maximize both your leads and your time. ■



Innovation for Marketers by Marketers

A joint Marketo and Reachforce research piece found that businesses are 67% better at closing deals when sales and marketing work together. It is critical for marketing and sales to work together to create best practices, deliver more quality leads, and drive higher-impact deals.

Here are some key tips how to accomplish that:

1. LEAD SCORING

There are a few strategies that enable you to follow up with prospects at precisely the right time, but the one that appeared in both presentations was lead scoring.

Lead scoring is a method of ranking leads for their sales-readiness, agreed upon by both sales and marketing, and it's essential to ensuring that your organization is well aligned. According to MarketingSherpa, 61% of B2B marketers send all leads directly to sales; however, only 27% of those leads will be qualified (aka in that "right time" window). And Gartner reports that up to 70% of sales leads are not properly leveraged or are completely ignored thus wasting marketing programs dollars. This all seems like a waste of everyone's resources—and something that can easily be addressed by implementing lead scoring.

As you implement lead scoring in your marketing automation platform, think about creating metrics based on:

- **Demographic or Firmographic Scoring**
 - This scores your prospects based on information like their job role, job title, technology used, country, industry, etc. The closer the prospect is to your ideal customer profile, the higher the score.
- **Asset Scoring**
 - Align your content to stages of the buying cycle and score each asset accordingly. For example, a top-of-funnel asset might have a lower score

than a middle-of-funnel or bottom-of-funnel asset to indicate that the buyer is at the beginning of their buyer's journey and perhaps just becoming aware of your company.

- **Behavior Scoring**
 - This indicates your prospect's readiness to buy. Track data that indicates interest, such as website activity (downloads, page visits), channel participation (PPC, events, inbound calls), and email engagement.
- **Interest Scoring**
 - This ties into behavior scoring, but with a focus on what specific content your prospects are interacting with to determine which products or services your they might be interested in.

2. MQLS

SQL, one of the many marketing acronyms out there (just to start, think: ABM, SQL, BEO...the list goes on and on). What is an MQL? MQL stands for marketing qualified lead—and represents a prospect who's lead score (see above) adds up to an agreed upon value (at Marketo, we chose 100) with a combination of those multiple values: demographic/firmographic "fit" score, engagement score, and buying intent.

Once a prospect hits this threshold, it's time to send this lead over to sales because they are considered warm and ready to be called.

- Did you receive the email with the links you were looking for?
- What resonated with you from this content that made you want to check it out?
- What happened recently that made this content more relevant/important to you?

After sales follows up on the MQL, they can then turn it into an SQL (yes, another acronym that I'll define in the next section).

3. SQLS

You probably figured out from MQL what an SQL is—and you're right! SQL = sales qualified lead. And what exactly does that mean? A SQL is a lead that has been accepted by an Account Executive after demonstrating BANT criteria:

- **Budget:** Do they have the money to purchase your product or service?
- **Authority:** Are they a decision maker or can they influence the decision maker?
- **Need:** Does your product or service fulfill their needs?
- **Time:** What is their time frame for evaluating and purchasing your product or service?

Ultimately, SQLs are the people that sales think has a HIGH potential to actually purchase the product. And these clearly are the ones you want to be following up with at the right time!

CONCLUSION

The moral of the story? Teamwork makes the dream work! SiriusDecisions reports that companies with aligned sales and marketing teams achieve up to 19% faster growth and 15% higher profitability. Don't you want to be part of these success statistics? ■

Marketo provides a complete marketing automation software solution that is powerful and easy to use for fast-growing small companies and global enterprises alike. Built for marketers, by marketers, Marketo is designed to allow companies to launch their first campaign in days and scale to meet the needs of the most complex global enterprise. The solution delivers everything a marketer needs to deliver more sales leads with less work, including inbound marketing, lead management, social marketing, event management, instant CRM integration, sales dashboards, and marketing ROI reporting and analytics — all in one place.

Learn more at www.marketo.com



Gain a Complete Picture of Your Sales Performance

IS YOUR SALES DATA AN ISLAND?

Most likely your sales data lives in your CRM application and your sales team looks at it each day to update their manager on their quota achievement. And that is what it was designed to do. But maybe you want the data to do more.

Unifying all your data into one analytics platform gives you a centralized view of all prospect and customer interactions along with unified definitions of metrics and calculations. Which would make it easier to track and analyze more than just quota achievement.

EVERYBODY LOVES DATA

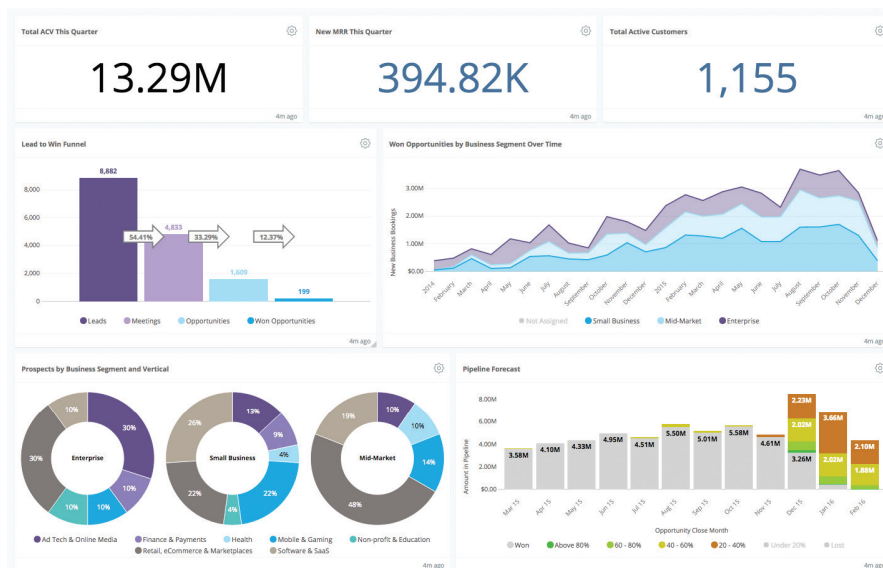
Now that data is front and center in this technology heavy world, people want access to it. And they should want access to it because it can answer so many questions to help them make decisions and fundamentally do their jobs better. The opinion of the highest paid person in the room is no longer seen as the best way to make decisions. Employees want access to data they can trust to decide on their next action and know what to do.

DATA CHAOS

Almost all data solutions available today have one of two problems – Either business teams have a data bottleneck and have to wait for their analysis because only a few data analysts can get access – or teams grab whatever data they can get, decide what business metrics to use, and end up making decisions based on an incomplete – and potentially incorrect – picture of the business – we call that total data chaos.

CONNECT CRM DATA WITH OTHER SOURCES

With Looker, you can combine sales data with marketing, customer engagement, and support data to gain a complete understanding of the customer journey. For example, with both marketing and sales data, you can see which marketing tactics are creating the most leads, buffing out your pipeline, and turning into customers. Add support data and calculate a health score for each customer. By unifying all your data sources into one



data model, you'll have a centralized view of all customer interactions along with unified definitions of metrics and calculations.

INSTANT DASHBOARDS AND DRILLABLE REPORTS

Create the magic sales KPI dashboard to answers your company's burning questions. How is our pipeline looking for next quarter? How does the pipeline compare to this time last year? Which of our field reps are demonstrating the greatest success, and in what areas? With Looker, anyone in the organization can hit the Run button to view daily, weekly, monthly, or quarterly progress reports. Want to go deeper? It's easy to drill into any data point or visualization, at any level of granularity, to understand customer purchasing behavior. And because everyone is looking at the same data in the same reports, everyone will have a common language for talking about performance.

DO MORE WITH YOUR CRM DATA

- Develop a clear understanding of the business with snapshots of pipeline forecasts, **trends over time**, and pipeline vs. target analysis.
- View **conversion rates at each step of the sales funnel**, and compare them across teams, individuals, and timeframes.

- Understand your pipeline and projections at any point in time using **historic snapshots**.
- **Compare individual reps performance to the entire sales teams** with customizable dashboards.

Now you can step beyond the limitations of siloed CRM data, with a new approach to analytics that unifies data and reduces workloads for sales teams and sales operations. With Looker's innovative solution, you can ask and answer questions of your CRM data, at any time. Instead of static charts and Excel worksheets, drillable views give you access to detailed data about your customers and their journeys—within seconds, rather than hours or days.

When you can do quick and easy analysis of your data, gaining the business-critical insights you need, you're sure to fall back in love with your CRM.

Looker has fast become the catalyst that is creating data-driven cultures at hundreds of industry-leading companies such as Yahoo!, Gilt, Warby Parker and Sony. ■

To learn more and get your free trial, visit looker.com/trial



You Can't Sell What You Don't Know

Some of the planet's most sophisticated salesforces have invested millions in CRM applications, yet they can't answer fundamental questions about their most valuable customer relationships—often complex, highly negotiated or frequently changing. Pop quiz ... do your account reps know:

- Which expiring customer contracts they need to focus on this quarter?
- Where are the immediate cross-sell and upsell opportunities based on white space?
- What is the current pricing structure with XYZ Customer to quote accurately?
- What discounts have already been approved to speed up deal cycles?

Probably not without devoting a lot of manpower and time to manually pull the right information together from a multitude of sources, only to have it quickly outdated. So your sales, finance and legal teams make uninformed critical decisions every day, leaving your business at risk of lost revenue, missed opportunities or big compliance headaches.

Pramata Customer Relationship Intelligence™ mines the valuable hidden data within your B2B customer contracts, then combines it with relevant data from your billing systems and CRM applications, to deliver a single, accurate information source that's incredibly useful to everyone who has a role in growing and maintaining strong customer relationships.

HOW IT WORKS: TRANSFORM DIVERSE DATA INTO EXCEPTIONAL CUSTOMER INSIGHTS

Customer data goes in. We collect a variety of key data and documents from the sources that define your customer relationships, including contracts, deal documentation and billing data, then organize that information into logical hierarchies.

Digitization happens. The key to gaining intelligence means transforming unstructured and diverse data into accurate, clean and timely digital information. Pramata's unique Digitization as a Service or DaaS process securely extracts critical contract data using proprietary technologies, processes and algorithms.

Normalization happens here, too, simplifying terminology from legalese into simple, meaningful English. It's an ongoing process where all intelligence is updated within 48 of the signing of new customer deals, so

your teams are always operating off of the freshest and most accurate information.

The "hub" keeps it centralized and secure. Pramata's Digital Intelligence Hub ensures your data remains consistent, accessible and highly secure. Our enterprise-class core infrastructure has been designed to serve the largest and most discerning companies in the world, with high availability and uptime, stringent service levels and ISAE 16 Type II security certification.

The built-in flexibility of the hub allows us to model a multitude of complex deal types, so regardless of your pricing complexity, product lists or deal structures, you'll have full visibility into essential information.

Consider the Digital Intelligence Hub your solutions "motherhip." It's the dynamic launching point for ...

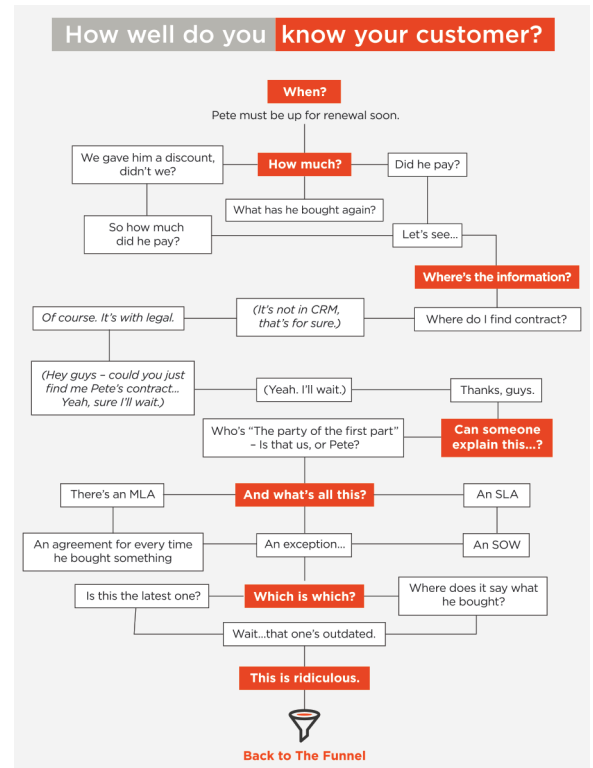
Uniquely configured transformation solutions that both bridge existing process gaps and build next generation relationships within and among your core business areas of Sales Effectiveness, Business Performance and Contracts Management.

One single, shared source of truth fuels every solution touchpoint—from customer on-boarding to managing renewals to ensuring regulatory compliance—revealing new insights for stronger customer interactions every day, including upcoming expirations, opportunities, overlapping agreements and much more.

You see everything in context. Delivering this intelligence means nothing if it's not within a meaningful context for each user. Pramata offers multiple user experience options so your users have the most useful view of this information.

ELEVATE SALES EFFECTIVENESS WITH SALESFORCE.COM INTEGRATION

In addition to empowering the sales team, Pramata empowers sales operations teams with data they need to effectively provide customer-specific pricing within the quoting



process, conduct white space analysis to drive sales strategy and execution and streamline or even eliminate deal approval steps through the clear identification of existing relationship commitments and trip wires.

Integrating this information into your Salesforce instance creates a true self-serve portal for your sales team and helps maximize your Salesforce investment quickly.

VALUE BEYOND SALES OPERATIONS

Sales effectiveness is a core competency for your company, but not the only one. The same single source of customer intelligence informs critical decisions in business performance and compliance.

That's why some of the most recognizable companies in telecom, pharma, enterprise software and manufacturing across the Fortune 2000 partner with Pramata to empower sales, finance and operational teams with vital information about their most complex and valuable customer relationships. ■

See for yourself. Contact Pramata today for a personal demo or read more at www.pramata.com.



4 Must Have Strategies to Optimize Your Sales Cycle Pre to Post Close

By Sienna Quirk, Product Marketing Manager

There are a lot of ways your sales organization is failing you. When not focused on the right activities, momentum stalls and you find yourself two days before the end of the quarter wondering what happened. If you look at all of the possible points of failure within the sales cycle, can you blame that committed home run deal that pushed or was it the singles and doubles the team missed that took away the amount of tasks that keep them out of the field?

Whether you like it or not, your sales team is wasting time every day on activities that take them out of the field. From pre to post sales your team wastes time on tasks that do not drive revenue. Take your sales team from good to great by removing administrative tasks to create efficiencies throughout the sales cycle and give time back to the sales team with these improvements.

MOTIVATE YOUR TEAM TO USE THE TOOLS YOU'VE ALREADY INVESTED IN AND ENHANCE THEIR FUNCTIONALITY.

Your company spent a significant amount of money on a world class CRM to make tracking deals, forecasting pipeline and retaining customer information easy. So why does your team still rely on color coded Excel documents only they understand? Because it's easy, and they do not see the value in updating account information. Unless reps see the financial value in keeping CRM data current, you will never see the true value of your pipeline because bad data in is bad data out. As a sales leader, how do you motivate your sales team to use the tools they've been given? Try implementing a tool that allows you to interact with Salesforce lists and related lists just like Excel to keep data clean and manageable, while also eliminating the hassle of data entry. Imagine the ability to add and edit in the related list without clicking through opportunities or make mass updates and changes to groups of opportunities without ever leaving your CRM.

ELIMINATE ADMINISTRATIVE PAPERWORK.

The amount of paperwork that can accompany a sales cycle is staggering.



When you think about the proposal, quote, contract, invoice and the revisions for each, it's no wonder sales teams struggle with time management. We hire these sales stars to sell, why is it we also expect them to be the masters of contracts and quotes? Implementing a document generation application increases your CRM's functionality, makes mundane paperwork easy and encourages reps to utilize your CRM. With a click of a button professional looking emails with documents are created based on your templates, which removes time consuming errors, protects message and company brand and makes it simple for a rep to produce a document at any stage in the sales cycle. When reps realize they no longer have to waste time on administrative document creation, they are more likely to keep records up to date.

CLOSELY MONITOR PIPELINE THROUGHOUT THE MONTH.

This may sound like table stakes, however, too many leaders wait until the end of the month or the end of the quarter to really evaluate the health of their pipeline. The reason? Reports take time, energy and resources to create, absorb and act on. That time could be spent doing something more productive like coaching your team to help close more deals. Implementing templated, automated reports to show the activities that matter most to your business cuts down on the manual fire drills that takes place when someone asks "what's the pipeline look like".

EVALUATE YOUR POST SALES GAME PLAN

What does your sales team engagement look like a week, a month or three months after close? Or do reps move on to the next

deal as soon as a purchase order is in hand? Implementing tools that increase efficiency on the billing and account planning side increases time to revenue and provides insight for expansion and retention. Imagine a rep closes a sale as won, and it kicks off a series of events without another manual action taking place. It's possible to build out workflows that initiate and send an invoice as soon as a rep closes a sale. This can include adding a task to review usage at day 60 to ensure the customer usage matches their purchase (think upsell opportunities or churn mitigation).

Increased attention to process and procedure and investments in tool enhancements can immediately improve the dynamic of your sales cycle. These tools and process improvements need to work together through the sales continuum for the best results. If you are not managing the data entering the CRM you cannot benefit from increased reporting and automation in pre or post sales. When you address the full sales continuum you increase visibility, decrease non-revenue generating activities and create a happier workforce free of administrative tasks. ■

About Conga:

Conga helps accelerate the sales process giving back selling days by minimizing bottlenecks caused by document generation and data management. We help get teams to quota faster by automating non-revenue generating activities related to even the most complex sales scenarios from pre to post sales to keep your team in the field and executives informed.

www.congamerge.com



Online or On-premise CRM: What's Your Choice and Why?

Choices among CRM platforms have evolved over the years since the introduction of the platform. No longer beholden to just customer service, the CRM can now automate marketing, sales and even some social media tasks as well. As the technology develops, CRM adoption will continue to gain widespread acceptance and traction among both enterprise and small businesses.

According to Forbes, CRM is expected to grow to a \$36.5 billion market worldwide by 2017. As companies begin to realize the most valuable assets they have are solid, long-term customer relationships, more and more are looking to invest.

As with any technology new and undiscovered, education is key in the increase of CRM adoption rates. With that, let's look at the two platform variations available; Online and On-premise.

ONLINE CRM

Whether called online, cloud or SaaS (Software as a Service), a company will subscribe to the online platform, usually paid monthly. Users access the software through a web browser without the need to download or install anything to the user's computer. It's the platform with the lowest initial cost and risk.

Advantages of Online CRM

- No upfront expenses like hardware purchases or IT staff additions are required. Maintaining servers, data backups, and disaster recovery measures are no longer needed.
- Online CRMs are typically subscription based – needing no capital investments. Users subscribe with payments typically month-to-month or yearly.
- Software upgrades and feature enhancements are mostly automatic. Done mostly during off-hours, you may not even notice the upgrade unless the company alerts you to it.

Disadvantages of Online CRM

- Obviously, to be online, an active Internet connection is needed. When interrupted, whether through server, ISP or web browser issues, businesses can suffer unexpected downtime.
- Online CRM customization can be very limited – specially integrating with legacy systems. Although integrations from third party developers are becoming more

commonplace, companies in need of custom development may not find it online.

- As concerns over data security and privacy grow, businesses may not like their customer information to be stored by another company that can be hacked. Government and health care entities are representative of this concern.
- Total cost of ownership (TCO) for the lifetime of the system is higher for online deployment. Typically, three years is a break-even point where online starts to cost more every year.

You'll see more entrepreneurs, small and mid-sized businesses opting for the Online CRM. Low startup cost and no long-term commitment often make it the optimal platform for this demographic.

ON-PREMISE CRM

Alternately, On-premise CRM software is purchased, installed, and administered by the company that purchased it.

Advantages of On-premise CRM

- As a company installs the software on its own web servers or on their private cloud or the data center, On-premise CRMs offer the most control of security, customization and integration. As such, it can be maintained by the company's own IT staff.
- On-premise platforms offer more customization ability to integrate both in-house and third party enterprise and cloud software.
- On-premise CRM software can offer a significantly lower TCO (total cost of ownership) than online when used over a period over three years.

Typically larger companies with IT resources and have the money for capital investment will use on-premise deployment. Also, companies



wanting to automate multiple departments in one system requiring integration with legacy systems will use on-premise.

Disadvantages of On-premise CRM

- As mentioned, On-premise requires upfront costs as much as three times of annual cost of online and resources for the initial setup including software, hardware, implementation, and IT staff.
- Sometimes, implementation can be time consuming and expensive to integrate with legacy systems due to compatibility and performance issues.
- As the software requires IT personnel on staff often puts it beyond the budget for companies who do not have necessary IT staff.

Cost alone often leaves On-premise CRM software the choice of large and enterprise level companies. Most often, the choice of On-premise is justified to coincide with a recent computer hardware purchase or the addition of an in-house IT department.

This may account for the shift in platform preference from on-premise to online.

Time and technology will tell. ■



Make the most of your sales data

Realize your full potential with self-service analytics

For salespeople, having a solid plan is key. Based on a firm knowledge of customer pain points and a well thought-out solution, the plan keeps B2B, B2G, and B2C professionals in control of the sale.

Experience and intuition can go a long way. But supporting core sales skills with real-time data and analytics provides that deeper insight needed to not only close the sale, but also maintains a customer for life.

CHALLENGES WITH TRADITIONAL APPROACHES

Studies show data-driven organizations that embrace analytics are more confident about the decisions they're making, which puts them in a better position for long-term, sustainable growth. But many organizations aren't getting enough out of their data.

That's because systems such as CRM, marketing automation, and finance often have limited reporting and analytic capabilities that don't speak with one another. There is also a lag between asking IT for reports and getting the insight — time that sales does not have. Different reports and different data sources often tell different versions of the truth, which leads to more questions than answers.

So, how can sales organizations use data more effectively?

PUTTING SALES IN CONTROL OF ITS OWN DESTINY

Self-service data analytics from Qlik® lets salespeople and managers access the information, when and wherever they need it. Qlik integrates complex data from Salesforce, Saleslogix, and other CRM sources, including direct connections to big data. Users can instantly search, question, summarize, and drill down to actionable insight on regions, customers, products, costs, margins, and more.

Qlik's visuals are more than just pretty pictures. Qlik's associative data indexing ensures charts, tables, and graphs are wired together for deep exploration of relationships within data, automatically updating as you discover new questions and insights.

And because Qlik's drag-and-drop interface is so easy to use, sales users do not have to rely on analysts or IT to produce reports or answer follow-up questions. They can create their own analysis and easily communicate discoveries among colleagues. At the same time, IT data ownership ensures quality and security are not sacrificed in the name of self-service.

Qlik governance addresses the most demanding enterprise requirements.

BEST PRACTICES TO MAKE THE MOST OF YOUR SALES DATA

Top sales organizations employ best practices for high performance. Qlik supports these practices through self-service analytics.

Define your strategy. Effective sales planning requires visibility into company performance. The better the visibility, the better the plan. Qlik supports virtually every aspect of sales planning, including market segmentation, operations, customer engagements, and product analysis.

Self-service data discovery helps sales devote energy to the activities with the highest payback and the highest quality interactions with customers.

Get control of your data. The ability for organizations to have access to relevant data is the foundation for effective sales analytics. Challenges in doing this can include limited data access, disparate data sources, or lack of processes and procedures. With Qlik, users can benefit from many features including an associative model, a fully integrated platform, and self-service visualization — which allow users to see the whole story that lives within their data.

Turn data into performance. With many repeatable sales processes, top sales leaders focus on optimizing performance with the help of analytics. The use cases include high level management dashboard to customer and market segmentation, as well as product and pipeline analysis.

COMMON SALES USE CASES

The following are some examples that show how Qlik can support sales performance.

Sales management dashboard. Through Qlik's self-service dashboard, sales leaders can monitor business performance indicators such as revenue, margins, and product analysis, drilling down into the details behind concerns and opportunities. To explore any question, they can slice data by any dimension: margin by rep, revenue by product group, trending sales averages, and more.

Market analysis. Managers can perform market segmentation by industry, region, company size, and more. They can compare pipeline against closed revenue, perform what-if analysis, spot opportunities for

increased investment, and analyze segment trends to ensure a market match.

Qlik lets managers balance staff coverage with regional opportunities, drill into the accounts, and analyze rep results. A whitespace analysis allows mapping of a customer's pains to the organization's portfolio of solutions.

Pipeline analysis. Qlik helps sales organizations improve forecasting, budgeting, campaign planning, and expense management. Sales managers can explore their team's performance against goals, from high-level visualizations down to individual transactions. Managers can create their own territory and team analysis, track closed against quota, and compare customer buying behaviors to sales activity. This results in a more predictable and effective sales process.

Customer engagements. Qlik lets sales managers and reps manage relationships and channels, track acquisition and conversation rates, and explore historical and demographic purchasing patterns. Which customers are producing the most revenue with the highest margin, and vice versa? Which customers' buying patterns are indicating increased future sales? A more in-depth knowledge of customers means more focused sales activities and better customer relationships.

Product analysis. With Qlik, sales organizations can explore pricing, promotions, and margins to optimize sales. They can see which categories and products are trending up. They can create product, consulting, and service scenarios to uncover the best margins. Finally, they can identify opportunities for cross-sell and up-sell in accounts.

GETTING STARTED

Qlik bridges the gap between sales data and the actionable insight needed to drive results. By connecting data from a variety of sources, Qlik provides greater visibility across the entire sales cycle, helping sales formulate better plans and improve performance.

With Qlik, sales leaders and their teams have a window into their business, allowing them to explore data in new ways. Through guided analytics and self-service visualization, Qlik unlocks discoveries that would otherwise be hidden, allowing them to see the whole story that lives within their data. ■

Ready to get started? Explore our sales demos to see what's possible with Qlik. Visit qlik.com/salesolutions