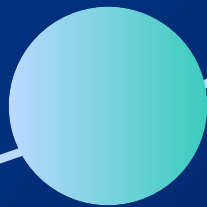


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WORKBOOK

3 Steps to Unleash a High-performing Pipeline Engine



Introduction

Today's go-to-market (GTM) teams require unprecedented levels of operational efficiency, a healthy pipeline, and higher conversion rates to translate that pipeline to actual revenue. Ensuring your teams are engaging the right people in the right accounts while tracking pipeline health against a standard sales qualification methodology are mission critical to your success.

This cross-functional orchestration requires new levels of operational visibility, fueled by objective, complete data that is accessible to all GTM teams. Conversely, organizations that continue to rely on traditional approaches to maintaining CRMs and patchworks of data or anecdotes will be operating in the dark.

Make the unclear, clear so that your pipeline engine is running smoothly – and so you can track and measure what works.

Following the steps outlined in this workbook will ensure you put the right stakeholders at the center of every deal while empowering your reps to sell more, faster. In other words, this workbook will help you get on the proven path to enterprise pipeline and revenue generation.

Three steps to unleash a high-performing pipeline engine:

1. Empower GTM teams to engage the full buying group in promising accounts
2. Map and validate engagement with key stakeholders in an opportunity
3. Measure the effectiveness of your standardized sales qualification methodology

Who Will Benefit From This Workbook?

- **Chief revenue officers** who want to improve visibility and collaboration across GTM teams to enhance pipeline coverage and conversion rates.
- **Sales leaders and operations teams** who need to improve the adoption of their sales methodology and measure its impacts on the business.
- **Frontline sales managers** who want to improve their coaching techniques, validate whether reps are targeting key accounts, and improve execution against opportunities.

Step 1: Empower GTM teams to engage the full buying group in promising accounts

Sales leaders and frontline managers need to ensure their reps and extended selling teams are making inroads high and wide into accounts. Doing so will pay dividends when a new opportunity opens, as reps will have the connections to gain the right levels of support, and potentially even cross-sell and up-sell to improve deal sizes.

However, today's buying groups are larger and more complex to navigate. According to LinkedIn, the average number of buyers in a B2B sales cycle is 11¹.

The Key Enablers	How You'll Measure Success
<p>Visualize the entire buying group using automation. Transform the way your reps penetrate key accounts by giving them the ability to easily identify and engage all the right movers and shakers. A foundational step is deploying a data platform that automatically captures all contacts your reps have already engaged with, syncing business-relevant details from email, calendar entries, virtual meetings, and other activities to that customer's or prospect's account record in your CRM.</p> <p>The right solution will remove the toil of manual entry by letting automation do the heavy lifting. It should also filter out non-business activities so that only relevant data is captured and surfaced to your sellers.</p> <p>Pairing activity capture with rich visualizations of the entire buying group – commonly known as relationship maps or organization charts – can also help remove account blind spots. Ideally, the relationship maps should pinpoint the relative amounts of influence each contact wields, as well as the relationships between contacts across teams and departments.</p> <p>Lastly, as new contacts emerge or when existing contact details change – for example, titles or contact information – your CRM should reflect those changes behind the scenes. With continuous enrichment happening automatically, sales teams never have to worry about contact data going stale, nor making the required changes manually.</p>	<ol style="list-style-type: none">1. % increase in number of contacts identified per account2. % increase in number of contacts actively engaged per account3. Improvements to individual contact engagement scores

¹ LinkedIn, "Global State of Sales 2022"

The Key Enablers

Track and assess sales activity within key accounts. Sales leaders, operations, and frontline managers also need detailed views into recent and upcoming interactions with each priority account and with every individual contact in that account. These account-level insights should be aggregated and indexed into health scores that help teams discern whether there is sufficient engagement compared to historical activities and previous wins or losses with that particular customer.

The health scorecards should help managers assess whether strategic account plans are being followed as designed, and can also guide next steps. For example, if the account team hasn't spent any time with a more senior buyer in the prospect's organization, the sales manager and rep can bring in executive-level support and facilitate a meeting.

Lastly, account scorecards can also help surface dormant accounts that are demonstrating purchase intent, but do not yet have an active opportunity or any associated pipeline. The converse is also true – if accounts are perceived to be important, but in actuality there is low purchase intent, sales teams can instead shift their focus to more promising prospects.

Accelerate account transitions with a full audit trail of activity. With turnover amongst sales teams at an all-time high, it's easy for information about "who's who" within an account to get lost in the shuffle. Fortunately, capturing and visualizing account and persona-level engagement data serves another vital purpose – helping transfer account ownership from rep to rep or from team to team in a more data-driven, frictionless fashion.

Here, historical engagement data on accounts, opportunities, and any products or solutions that have already been deployed provide a full digital trail directly in the CRM. So instead of spending time holding numerous knowledge transfer sessions or forcing reps to manually document transition plans, all of the vital information is already captured and accessible to all team members directly in the CRM. This empowers new sellers or entirely new teams to hit the ground running on day one.

How You'll Measure Success

1. % increase in reps engaging with target accounts
2. % increase in target accounts engaged over time
3. % increase in pipeline coverage within target accounts
4. % increase in sales activity & engagement in target accounts
5. % increase in validated account plans
6. % increase in dormant pipeline activated & closed

1. % decrease in new rep onboarding time
2. % increase in customer satisfaction scores
3. % increase in cross-sell opportunities opened against key accounts



Checklist: Pinpoint Your Strengths and Areas for Improvement

- Our reps are no longer manually keying sales activity data into CRM. The process is automated, and data is accurately matched to the right account or contact records.
- Our CRM provides recommended next steps based on existing account and contact engagement data, meaning reps no longer have to manually analyze information to plan the course of action.
- Our relationship maps are automated, so sellers no longer have to manually log contacts and related data such as titles, contact information, and buying influence.
- Our reps can now fully manage their account plans natively in the CRM. We use scorecards or similar capabilities that help assess account health and pinpoint next steps.
- Every member of the cross-functional GTM team – including marketing and customer success – has access to and operates from the same account information.

A Profile in Customer Success

Company profile: 4B+ American Multinational Cybersecurity Company

Challenges: Lacked visibility into which contacts sales had engaged and, of those, which ones ultimately became key revenue influencers or buyers.

Solution Capabilities: Automatically created contacts and converted them to opportunity contact roles (OCRs), and attached all sales engagement with those contacts over time.

Outcomes:

- Created 8,800 new contacts almost instantly, of which 20% became key buyers on opportunities (e.g., opportunity contact roles or OCRs) – **a 6.7x improvement over other contact sources.**
- Converted OCRs influenced \$595M in pipeline – **a 12x higher revenue per OCR than any other source.**
- **11.7x improvement in average pipeline influence per person.** These newly created OCRs yielded \$68,000 in pipeline per contact (vs. \$5,800 per OCR for other sources).

Step 2: Map and validate engagement with key stakeholders in active opportunities

Data and intelligence on key buyers is a critical part of fostering strong relationships and ultimately improving opportunity conversion rates. But as the enterprise buying group grows bigger, it's harder for sellers to validate key stakeholders on the buying team such as champions or economic buyers, let alone ensure there is sufficient engagement with those individuals.

These larger buying groups underscore an increased need for multi-threading in deals. According to LinkedIn, 86% of organizations reported having lost or stalled a deal in the last 12 months based on decision-makers changing roles².

The Key Enablers	How You'll Measure Success
<p>Understand the impact specific buyers have on every deal to create a more predictable path to closed/won. Once an opportunity is opened against a key account, applying the same methods of tracking and measuring engagement with key purchasing individuals is critical.</p> <p>Here, instead of tracking engagement scores with personas (i.e., titles and seniority), it's important that sellers are mobilizing and winning over the right stakeholders – economic buyers, champions, and other advocates for your product or solution. Conversely, people who are engaged but lack the buying power needed to close or approve the deal can waste a rep's time. This level of influence (or lack thereof) is something sellers need to be mindful of to ensure they are spending the right amount of time with the right buyers in the account.</p>	<ol style="list-style-type: none">1. % increase in average number of identified stakeholders per account2. % increase in number of engaged stakeholders per account3. Improvements to stakeholder engagement scores per account4. Improved win rates correlated to better stakeholder engagement

² LinkedIn, Global State of Sales 2022: US and Canada Edition

The Key Enablers

De-risk opportunities by relying on deal indicators, not anecdotes. Being able to proactively address risks such as single-threaded opportunities, not having any upcoming meetings, or not engaging internal executives for added air cover is critical for improving conversion rates and avoiding deal slippages. But hounding reps to provide these updates and relying on anecdotal information is inefficient, unreliable, and ultimately a time-killer.

Instead, reps, managers, and extended team members need data-driven, visual breakdowns of activity trends, including who's been engaged, how much time is spent with each stakeholder, and what activities are on tap. Understanding what is happening week to week and how this level of activity compares to previous time periods provides insight into the overall health and trajectory of each opportunity, and can also help ensure the right stakeholders are being engaged at the right time.

Leveraging health indicators such as these ensures opportunities stay on track, allowing sales managers to provide coaching on multi-threading as a team, or how to shape upcoming meetings. It can also inform the marketing organization's account-based strategy, such as inviting key stakeholders to an executive roundtable or other exclusive event.

Lean into leading indicators to help predict and shape future success. Too often, teams focus on lagging metrics – average deal size, number of deals won – but these can't help shape future outcomes, as they're akin to looking into the rearview mirror.

Best-in-class sales organizations turn toward leading indicators such as the number of meetings booked or the percentage of opportunities where the economic buyer has been engaged, as these data points can be correlated to the number of closed/won opportunities and other previous sales outcomes. In other words, with these metrics, sales teams have data-driven guideposts to know what volume of activities – with which stakeholders, and at which sales stage – have generated success in the past, and can be applied to an existing opportunity.

How You'll Measure Success

1. % increase in time spent with key stakeholders per opportunity
2. Time-savings during deal reviews
3. % decrease in delayed deals per quarter
4. % increase in executive meetings per rep
5. % increase in reps participating in multi-threading

1. Increased utilization of leading indicators (e.g., number of metrics used)
2. % increase of sales managers using leading indicators for coaching
3. Number of won deals correlated to use of leading indicators
4. Increased number of reps meeting or exceeding key benchmarks



Checklist: Pinpoint Your Strengths and Areas for Improvement

- Reps and sales managers can easily verify the presence of champions, economic buyers, and other key stakeholders in each opportunity (i.e., without manually sifting through CRM).
- We are using engagement data to monitor and measure which stakeholders have been engaged, whether they're an advocate or detractor, and to determine next steps based on historical activity.
- We can quickly assess opportunity health using dashboards and scorecards. Sales leaders no longer have to rely exclusively on deal reviews or ask reps to manually report on deal statuses.
- We have set up automated alerts that can pinpoint deals that may be at risk, such as opportunities that are single-threaded.
- We have established benchmarks that highlight the behaviors of our top performers. Each seller has visibility to this benchmark data, and they are being evaluated against it.

Step 3: Measure the effectiveness of your standardized sales qualification methodology

Most sales leaders understand the importance of adopting and adhering to a standard sales qualification methodology such as MEDDIC or MEDDPIC. These tried-and-true methodologies help improve rep efficiency, compress sales cycles, improve win rates, and onboard new reps faster, among other benefits.

Unfortunately, sales leaders, sales managers, operations, and enablement teams can't easily validate how well their selected methodology is being adopted, let alone be able to stitch those utilization metrics to any desired outcomes.

When it comes to understanding how well your methodology is serving the sales organization, it's important to validate pipeline health and coverage through the lens of the approach, using methodology scorecards, checklists, and other built-in assessment tools.

The Key Enablers	How You'll Measure Success
<p>Bypass manual entry of qualification data in your CRM. As you prepared for improved sales and marketing execution, you ideally operationalized your methodology natively in your CRM. Now it's time to take advantage of real-time, accurate data – eliminating the manual drudgery of qualifying opportunities.</p> <p>In support of your selected sales methodology, this includes housing all qualification details in your CRM, which should automatically match to the right opportunity record. This not only improves seller efficiency, but also helps highlight blindspots, informs reps of meaningful next steps, and keeps everyone on the extended team aligned on deal progression.</p>	<ol style="list-style-type: none">1. % increase in opportunities with captured qualification data in CRM2. Time savings when capturing qualification data

The Key Enablers

Use scorecards and checklists to track adoption and improve pipeline health. The use of scorecards that are tailored to your methodology and are embedded in your CRM can improve accountability by measuring rep adoption. Scoring can help spotlight risks with a given opportunity, while the associated reporting can assess methodology compliance at the opportunity, rep, and team level. Secondly, using task-driven checklists to ensure reps meet all exit criteria before advancing opportunities to the next stage can also improve qualification standards.

By using these built-in tools, sales leaders get a more accurate depiction of pipeline health, providing more confidence that the number they're committing to is grounded in unbiased data – not seller opinions. This ultimately improves sales forecast accuracy, drives higher conversion rates, and shortens sales cycles.

Connect your relationship maps to sales qualification methodology steps and stages. Ensuring your relationship maps are integrated with your sales qualification processes will provide a more scalable, consistent way to ensure the right stakeholders are engaged and providing the right levels of buy-in, as defined by your sales methodology.

For example, if your methodology dictates that the economic buyer approves the solution requirements during the third stage of a buying cycle, sales managers can quickly ensure that step is complete before the opportunity progresses forward.

How You'll Measure Success

1. % increase of sales reps using your sales methodology
2. % increase in compliance (per rep and across teams)
3. % decrease in sales cycle length

1. % decrease in opportunities slipping to future quarters
2. % increase in opportunity conversion rates



Checklist: Pinpoint Your Strengths and Areas for Improvement

- Our reps no longer view the sales qualification methodology as a sales inhibitor. More reps have adopted the methodology, and it's helping focus their time and efforts.
- We are using supporting software to help track and enforce the sales qualification processes. This software is natively embedded in our CRM and doesn't require reps to log into a separate tool.
- We are tracking compliance with our sales methodology at the opportunity level, and we can drill-down into specific stages, where we can see notable improvements across the board.
- On top of measuring adoption and compliance, we can also correlate the use of our sales methodology to measurable outcomes, such as increased win rates, shorter sales cycles, or improved deal sizes.
- We have the automated data and insights to do these measurements in a streamlined fashion, and are no longer having to manually conduct such analyses.

TTEC: A Profile in Customer Success



Company profile: Customer experience service provider

Challenges: Poor deal disqualification processes; tool fatigue that impacted rep productivity and inhibited data-driven decision making; subpar sales experience led to increased rep turnover

Solution Capabilities: Uses People.ai to implement a structured deal inspection process so sales can disqualify deals faster and improve visibility into pipeline health.

Outcomes:

- Secured 27% more meetings
- Engaged 10% more opportunities
- Won 10% more deals

[READ THE FULL STORY](#)



Conclusion: Confidently Drive Pipeline Conversion

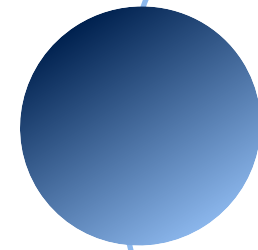
Measuring the performance of your sales team hinges on an accurate, timely view into the multi-faceted activities reps and supporting sales resources engage in. First, they must identify and foster relationships with the right accounts and personas. Next, they must mobilize and convince all the key stakeholders to drive purchasing consensus when an opportunity opens against those key accounts. And lastly, they must be applying and tracking these activities against your chosen sales methodology to improve downstream sales outcomes.

Simply put, you need a way to ensure that your team is adhering to and effectively executing on these steps to ensure a healthier pipeline, and then win more business, more efficiently.

With the right enterprise revenue intelligence platform that features opportunity and contact scorecards, stakeholder mapping and labeling, and automatic data-quality enforcement, you can ensure your CRM data and overall go-to-market engine:

- Reflects the full buying group of all priority accounts
- Accurately describes engagement with key buying groups
- Is enforcing the correct application of your sales methodology

A true view into pipeline coverage and validation of activity against the right accounts and buying groups positions your teams to more consistently drive pipeline conversion and achieve revenue targets.



Start guiding your teams down the proven path to revenue success

The People.ai enterprise revenue intelligence platform helps teams speed up complex enterprise sales cycles by engaging the right people in the right accounts.

We do it by helping teams clearly see who to engage within each account and exactly what to do to deliver the highest-yielding deals and blow out their numbers every single quarter.

Ready to see this in action for yourself? Sign up for a demo today!

REQUEST A DEMO



About People.ai

People.ai is the leader in guiding enterprise sales teams on the proven path to pipeline and revenue generation. The People.ai enterprise revenue intelligence platform ensures organizations speed up complex sales cycles by engaging the right people in the right accounts. Through our patented AI technology, People.ai enables sales teams to clearly see whom to engage within each of their accounts and exactly what to do to deliver the highest yielding deals. Enterprises such as AppDynamics, DataRobot, Okta, and Zoom know that people buy from people, that's why people buy from People.ai.

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