The Ultimate Guide to Sales Automation

BROADHURST DIGITAL
DIGITAL · STRATEGY · GROWTH

Sales Rocks

Introduction

Are you looking for ways to improve your sales process? If so, you've come to the right place. In this ebook, we'll show you how sales automation can help you close more deals and increase productivity.

You'll learn about topics such as sales and marketing alignment, marketing to sales handoff, and how automation can help eliminate human error. We'll also show you what you can automate with sales automation.

So if you're ready to take your sales game to the next level, let's get started.

Marketing-to-Sales Handoff

In the past few years, we all witnessed rapid advancement in technology and software solutions as more and more businesses went fully digital. As we emerge from lockdown, more so. And while we may be back on the streets and offices, the digital transformation we already went through is here to stay.

This shift towards digitalisation touched every profession in one way or another, including sales. Luckily, the growing and overwhelming demands of the sales job are followed by growth in technical and intelligent software solutions for sales automation. The last year pushed us into some unplanned, sudden changes in how we buy, how we work, how we live our lives, and also how we sell.

So let's look at where technology and sales meet in this new business environment?

Sales automation uses software-based solutions to automate the repetitive, manual tasks of modern sales teams, leaving their hands free to get the most of their day and grow relationships with their prospects.

But in today's post-pandemic and economically drained sales landscape, the new definition of Sales Automation would be humanising the automated sales processes by embracing hyper-personalisation

The sales automation software helps minimise the time-consuming and mundane processes every salesperson goes through. This allows them to spend more time on what truly matters – selling. When we add authenticity and personalisation to the automated mix, we get a potent weapon to have in hand through the whole sales cycle.

Technology is changing the sales landscape rapidly, and sales automation is at the forefront of this change. By automating repetitive, manual tasks, sales teams can focus on building relationships and selling, which is more important than ever in today's economy. Sales automation software is the key to success in sales in the 21st century.

You know that your customers expect personalized service. And in today's competitive landscape, you need to be relevant to cut through the clutter.

But trying to manage all of those sales tasks manually can be time-consuming and draining. You need a solution that can automate many of those sales tasks for you.

Sales.Rocks can help by:

- Searching for the contact information of your potential customers automatically
- Verifying contact information so you don't waste time calling the wrong numbers
- Adding leads to your CRM automatically and segmenting them for you
- Sending emails to valid email addresses only
- Warming up your email domain automatically to prevent being marked as spam

Let sales software take care of the details so you can focus on what you do best. Closing deals.

Should you invest in sales automation?

As the sales landscape evolves, automation will become increasingly essential for success. Businesses need to adopt sales automation now to stay ahead of the competition. By doing so, companies can unlock new opportunities for growth and success.

Why use Sales Automation?
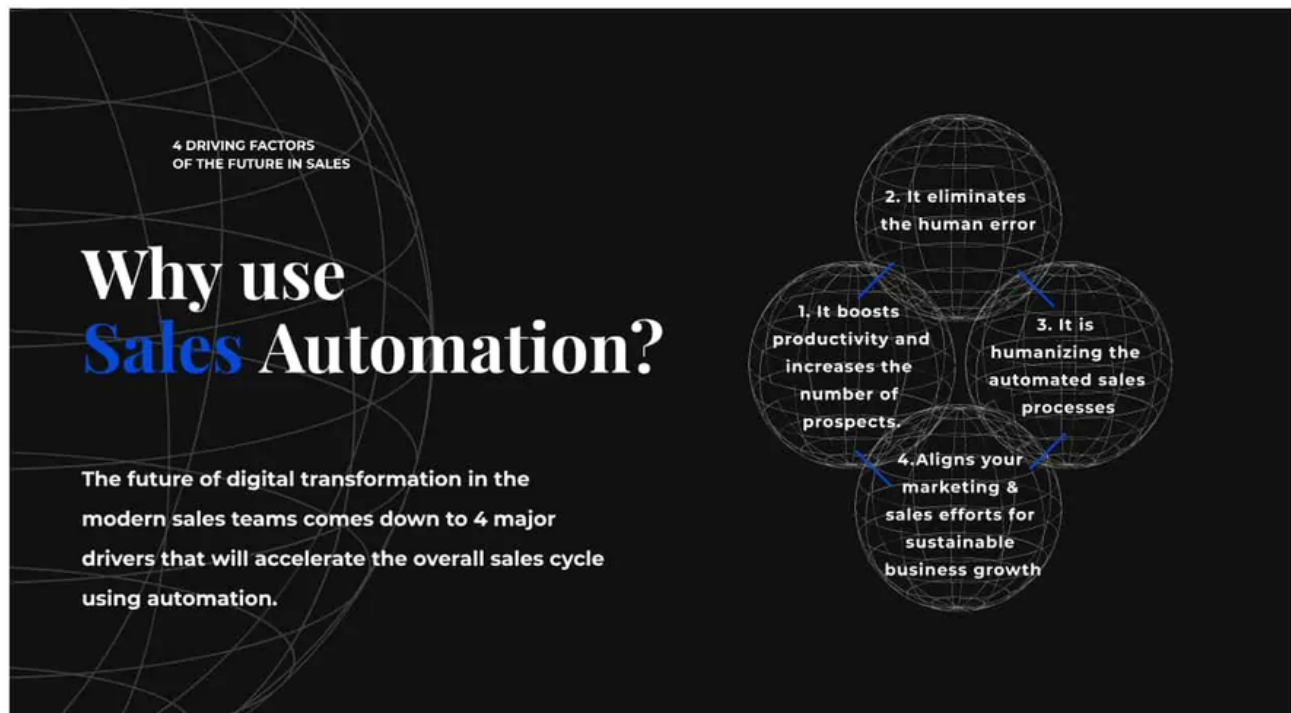
The importance of sales automation cannot be understated. By automating your sales processes, you can improve your organization's productivity by leaps and bounds.

A sales automation system will give you a centralized platform where all your data is put together in one place. You can have that data categorized and segmented into many different ways according to whom you aim to target and what you desire to achieve.

Then, you can do many things with automation to:

- Boost sales teams' productivity and efficiency;
- Increase your numbers for prospects and sales;
- Eliminate human errors;
- Enable email automation for the overall email strategy;
- Personalise every point of contact during the sales cycle;
- Align your marketing and sales efforts for the sustainable growth of your business.

Sales Automation Boosts Productivity

Sales automation is closely related to marketing & sales productivity (MSP) systems. It automates vast parts of all sales processes, such as lead generation and sales prospecting.

Before you start prospecting, you will need data about your prospects. Data means many different things for different businesses, and every company collects data differently. All of this data is relevant to the salesperson to sell. When salespeople have all this information at their disposal, they can become more effective at what they do.

In the B2B world, the most relevant and recurring data points needed for successful prospecting are the company and contact details of your ideal customer profile, such as the current active companies in your target location (region) and industry.

Sales automation tools make it easy to target relevant industries by filtering for industry codes like NACE, SIC, and NAICS. You can further filter by company size and web technologies used to help you decide if they are the right fit for your business. For example, if your SaaS integrates with the systems they are already using, it's a green light! If not, you just saved yourself a lot of time and energy.

Next, you'll need to know the names and job titles of the people working in those companies. Sales.Rocks platform offers the option to see the company hierarchy using the "Organizational View" tab.

When your SDRs know who the CEO / Chief Revenue Sales / Account Executive is, they will know who to contact and how to address them. Whether your sales strategy includes cold calling, cold emailing, or both, everything is easier with the correct phone numbers and active emails.

The first and most challenging part for all businesses is getting these data streams in. What Sales Automation platforms do is remove the complexity behind searching for and collecting the needed data.

When you are a startup company or a small business, no matter what kind of product or service you provide, in the beginning, you have a team pulling and parsing the data manually. Then trying to make sense of it. A sales automation platform will automatically remove all that work for you, saving your team a ton of time and energy.

It reduces almost 90% of the time the sales reps spend on generating leads by giving them access to the relevant data. In turn, this dramatically increases the productivity of the sales teams and the number of prospects.

According to Harvard Business Review, sales increases arising from sales automation technology have ranged from 10% to more than 30%, and investment returns have often exceeded 100%.

More specifically, sales rose 33%, sales force productivity rose 31%, and sales force attrition dropped 40%. These returns may sound like every sales professional's dream, but they are real. Increasing sales productivity has a significant impact on the bottom line.

> **"**
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Sales Automation eliminates the human error

Rather than relying on human-generated spreadsheets that can be filled with mistakes, you can use automatically created datasheets instead.

Sales Automation Platforms can seamlessly integrate with your email service provider (Gmail). And also with the software you are already using (Zoho CRM, TeamLeader, Zapier...). Once integrated, you can safely transfer data and information between your favourite sales and marketing tools and have an overview of the accuracy of your sales cycle.

This also provides greater visibility into sales rep and team performance.

When the generated and segmented company and contact lists are visible to the entire team, human errors in contacting the same prospect are eliminated. Plus, the account executives can see the ongoing email campaigns of each member of their team and manage them accordingly.

Having a phone verifier and an email verifier as part of your sales automation platform also helps eliminate the possibility of making an error such as cold calling the wrong number or sending your emails to non-existent email addresses.

Sales Automation is humanizing the automated sales processes using hyper-personalisation

As we mentioned before, personalisation is the new norm in doing business.

Designing an email campaign to meet every recipient's requirements on an advanced personalised level is not easy, especially when targeting 50 or 100 prospects at once. In 2022, even more so, the expectancy level of the personal approach has dramatically increased.

The ideal sales automation platform will enable you with many options to humanise your sales approach in your email campaigns. Starting from email outbound prospecting to lead nurturing and customer retention.

Platforms that include tools for hyper-personalisation, like Sales.Rocks, can provide you with many options for implementing dynamic content straight into your drip campaigns.

If you want to dive deeper into this subject, read this article on the power of hyper-personalisation in email marketing.

Sales and Marketing Alignment

The pressure on the budget and the trend toward account-based marketing (ABM) make upfront alignment between B2B marketing and sales teams more critical than ever. Besides, both teams have the same goal of driving sales and revenue for the company. So it is only logical to keep them in sync.

Sales and marketing alignment can lead to a 32% increase in year-over-year (YoY) revenue growth (Aberdeen Group) and 38% higher sales win rates (MarketingProfs).

A healthy relationship between your sales and marketing teams leads to a more rounded customer experience (=happier customers). This then leads to improved customer acquisition (=business growth).

That makes sense, right?

Good. Because for this relationship to thrive, you will need both teams to work on one centralized platform where all the critical data is stored. This is where the automation software comes in. Integrating your CRM with the sales acceleration software brings more transparency for both teams to function smoothly.

The buyer's journey of today's B2B customer has evolved quite a bit. So much so that marketers must support salespeople through each sales cycle stage to nurture leads efficiently. As selling situations grow more complex, sales teams rely on high-quality, marketing-produced content to help them close more deals. (Harvard Business Review).

At the same time, salespeople provide valuable insights in the form of statistics gathered from their selling experience to support the content made by the marketing team.

An automated workflow system makes it easier for both teams to work together. Just clarify the lead scoring, lead generation metrics, and service level agreements (SLAs) for everyone on board. Then, align the roles and organize the further steps that need to be taken at each point of contact.

A marketing qualified lead (MQL) that the marketing team has worked with and considers a good potential buyer can be transferred to a sales development representative (SDR), together with all the relevant data collected about them. The SDR then can include the MQL in the sales inbound campaign.

In the same way, a sales-qualified lead (SQL) – a prospect that the sales team believes is almost ready to buy – can benefit from an email marketing campaign that provides additional information about the service or product of the company.

Depending on the sales signals (or sales triggers) which are part of the sales automation platform, marketing and sales teams together will decide who will take over and what should be done next.

Automation isn't so good at is the creative decision-making process.

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Sales automation is an important tool for sales executives. Still, it cannot write the high-converting text of your outbound prospecting emails or design the best landing page for your ideal customer profile.

However, automation is getting better and better at helping you create and complete these tasks.

It can help you serve your orders based on existing data and proper setup. Automating the collection and analysis of the general information can also help improve the timeliness and quality of sales executives' decision-making process.

What sales processes can be automated?

Begin by automating the basics

Sales reps know that they need to send hundreds of emails to cold prospects every day, but they dread the time-consuming process. They started optimizing their email outreach by automating it.

There are software programs that allow sales reps to automate their email outreach, so they can send emails to all 100 cold prospects at once. Email sequences can be automated for every email, from the first cold email to the later nurture phase

Email automation can help you streamline your outreach process, but there are some potential risks to be aware of. If you don't set up your automation properly, you could end up harming your domain or appearing like a spammer.

To help avoid these problems, look for software that:

- enables you to warm up your domain first
- enables you to set a daily limit of how many emails will be sent
- gives the option to set up a sequence of more emails
- has defined conditions to know which email to send when

In order to automate your emails, you need to make sure you have all the necessary data about your prospects. One missing piece of information, such as a name or company, can cost you your reputation if the prospect receives an email with the wrong name or no greeting.

Automate through multiple channels

Would you like to automate your sales outreach process through multiple channels? It's easier than you might think!

There are tools available that can help you automate your prospect outreach outside of your email inbox. For example, imagine you have a prospect on LinkedIn that ideally fits your Customer Profile.

First, you send them a connection request (because we all know LinkedIn won't let us write to people whenever we want!). Then you wait for them to accept it and start tailoring your message. You've sent your first message, but no reply? You then try to grab their attention with a simple reaction on their latest post, a like, or a comment, let's say. Then it's time to act again with some follow up email...
But to follow all these steps for each prospect? Are you kidding me?

No, we're not kidding you! You can automate this as well. And this might be the next best thing you do in your outreach process since using different channels for outreach makes your prospecting look human-like but catches the attention at the right moment.
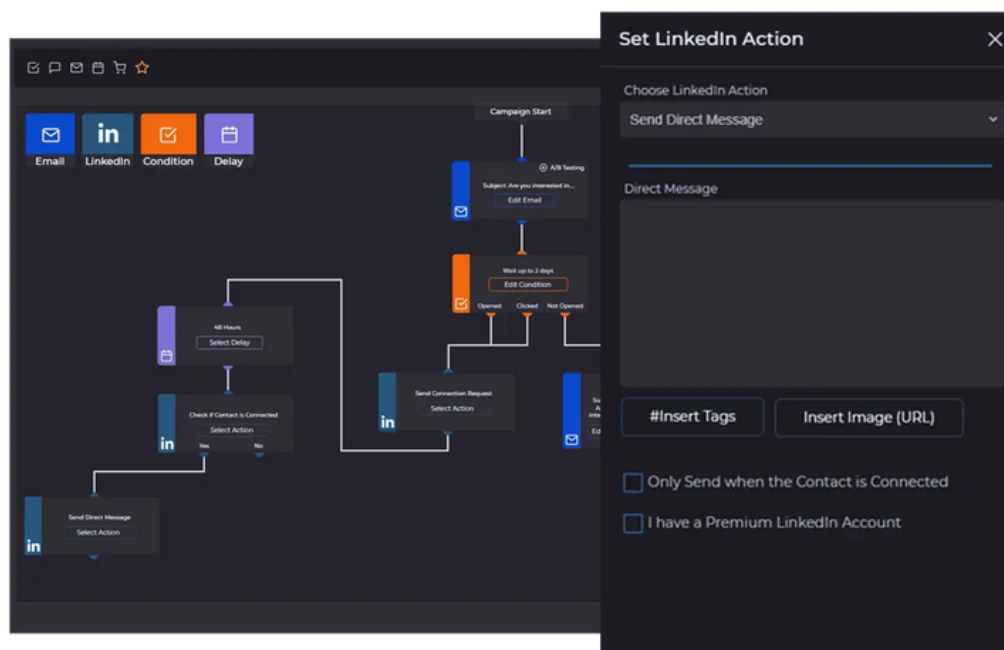
Automate your lead research

The worst part of being a sales rep is the lead research. You spend hours finding the perfect customer profile, and then when you're done, you have to start finding people who fit that profile... one by one.

It would help if you had their names, but you also need other information like their email address, phone number, and research on the company they work for. And you can't just send an unidentified email out of the blue.

But there's a solution! There are software platforms that give you access to databases with all the information you need to make an automated email outreach with personalized content.

Sales Automation Platforms like Sales.Rocks work based on an advanced filtering system that can shorten your research by 89%. You choose the filters matching your ICP, and within seconds, you'll receive a highly-targeted lead list of hundreds of leads containing all the information you need for prospecting.

The best part is that you won't need to do any further research. All the company information is already there, so you can start doing the first step of your Sales Automation (the email automation) in no time.

Automate your Inbound Outreach

LThe Inbound Outreach is based on marketing efforts and passive leads coming in from different sources (website visits, newsletter subscriptions, form applications, lead magnets, file downloads, social media clicks and messages, paid ads from all channels, etc.).

How can you automate an outreach that doesn't depend on you? Integrations between different tools should do the trick.

To start with the most anonymous leads - website visitors - you'll need a tool to track the visitor's IP when they come to your website. A good IP tracking tool must be connected to an excellent database that accurately determines who visited your website. Tools like Happierleads and Albacross can track website visitors and give you a rough idea of which company the visitor is from.

The privacy policies of internet users are strict, and this is understandable (otherwise, it would be like letting anyone enter your garden uninvited). So we can't determine who exactly visited your website. But we can make an accurate and highly-targeted guess according to our ICP and try to reach out to a person that would fit. (We know someone from the company was interested in what we offer, so we might just hit the right one or spread the word.)

You can start with a simple setup of emails. Remind them about their visit to your website in the first email, and craft a personalized landing page similar to the one they visited with the info they need and a custom offer. (You can do this with software for custom landing pages.) Personalization is everything!

Next, send them an automated reminder about what they are "missing out" on and some next steps they should take. They'll either qualify or be not interested. Either way, you can adjust the email automation to their reaction to your emails. Remember, even the absence of a response is a sign of a response.

Lastly, transfer them to a nurturing phase where they'll receive only educational content and work with them passively on their qualification.

Social media leads are easier to identify. They leave at least one piece of information about themselves, usually their email address, so this is a head start. You can then import them to your CRM and start the outreach.
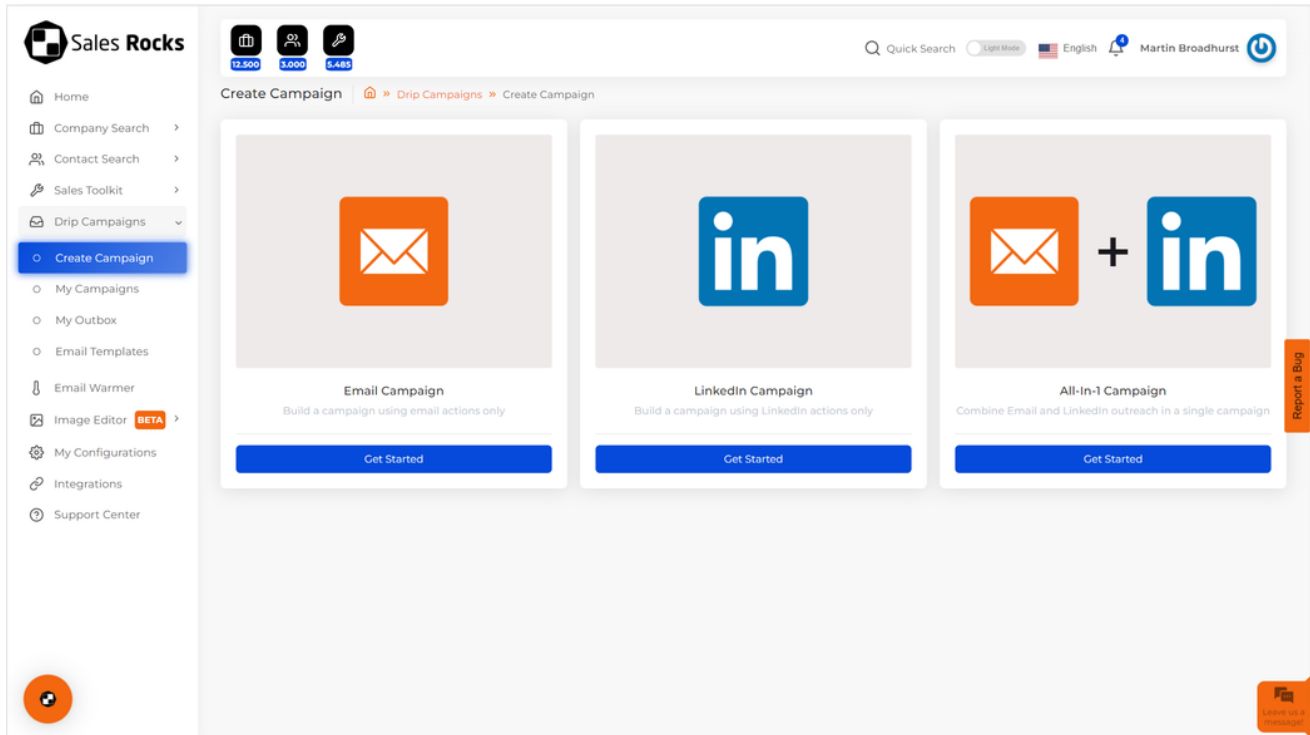
Automate your deal proposing

As an SDR, you may think you've won the battle when you get to the proposal stage. But there's still more work to ensure the client presentation goes smoothly.

It can be exhausting trying to manage multiple clients in the same phase, so this process should be automated. Sending a proposal in a personalized Landing Page or email can save you time.

Just make sure you have all the necessary information about the client. Gather as much data as you need and follow the automated signals occurring in their company. Adjust your proposal with the proper offer when you see that their quarterly revenue went up. And when you see there are changes in the leadership, make sure you get in touch with the new decision-maker in time to do the deal at the right moment.

In summary

Sales automation is key to increasing productivity and driving revenue growth. According to Harvard Business Review, automating sales processes can increase productivity by more than 30%, cut costs by 13%, and increase customer satisfaction by 10%. Implementing a centralised sales automation strategy is the best way to realise these benefits.

Sales automation software enables sales teams to automate repetitive tasks, such as prospecting and lead generation, to focus on more strategic activities, such as building relationships and closing deals. By automating these processes, sales teams can improve their efficiency and effectiveness and ultimately increase their sales.

The most effective sales automation strategies are centralised and coordinated across the entire organisation. A centralised strategy ensures that all sales activities are aligned with the organisation's goals and objectives and that everyone is working towards the same purpose.
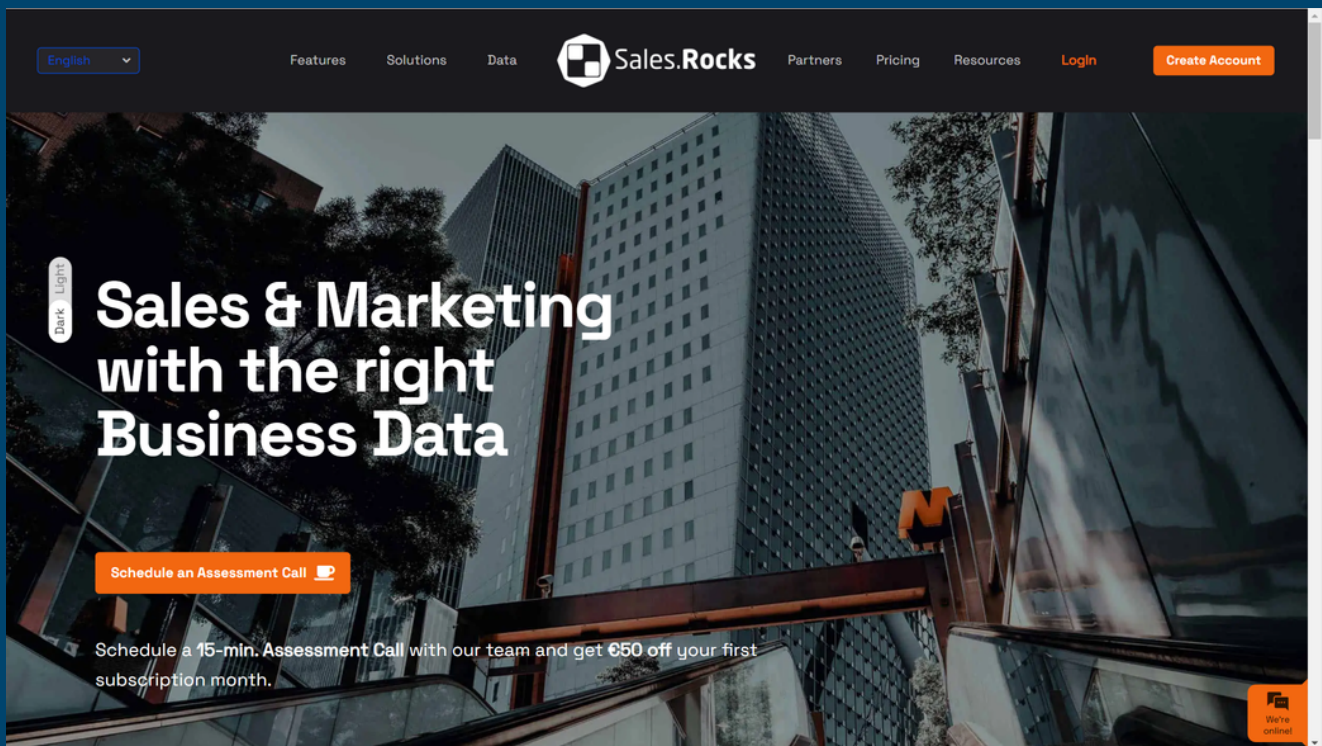
A coordinated sales automation strategy also ensures that everyone uses the same software and processes. There is no confusion about which software to use or how to use it. Instead, everyone works together using the same tools and techniques, making it easier to get work done and track progress.

Sales automation software can do more than automate repetitive tasks; it can also help sales teams be more effective in their interactions with customers. By automating customer communication, sales teams can free up time to focus on more critical tasks, such as building relationships and closing deals.

In addition, sales automation software can help sales teams to track their progress and performance. By tracking sales activities, sales teams can identify areas where they need to improve and change their sales strategies. This way, they can continuously improve their sales performance and increase their sales.

Get 20 free leads with a 7-day trial of Sales.Rocks

Access the full Sales.Rocks platform and unlock 50 companies and 20 contacts with a free 7-day trial of Sales.Rocks

I Want More Sales