Modernize Your Sales Process with iPaaS

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INTRODUCTION

Sales teams are often seen dabbling with multiple sales management apps and an overwhelming number of tasks to match their sales goals. The reason is simple: to be considered ‘thoroughly worked’, every lead should get at least eight touches, which can be established across a variety of physical and digital points. Multiply those touches by 200, 300, and 400 or say, a 1000 leads, and your sales representatives are suddenly drowning in an endless pool of information! There is simply not enough time for a sales person to analyze all this data and have personalized interactions with numerous individuals every single day.

For successful conversions, it is crucial to ensure that each lead is provided with the right communication on the right channel at the right time. The sales funnel must be designed in a way that it is able to consistently and continuously work through all the leads being fed into it, irrespective of the stage they are in. If unqualified leads somehow manage to sneak into the sales funnel, the sales representatives will be unable to process new inbound leads - causing them to miss out on the gold that is now spilling over the sides of the funnel and directly falling into the hands of their competitors!

With automation, this scenario can be improved in the blink of an eye - making the sales process far more manageable and quicker.

Sales process automation involves automating certain sales related activities and workflows with software to bring improved efficiency, transparency, and consistency throughout the sales funnel. Automation can make the sales process faster, error-proof, and cost-effective. It helps organizations save time and resources by performing all sorts of tasks - from simple ones like updating lead details and moving them to the next stage to complex tasks such as resolving customer tickets and sales pipeline management.

Leveraging technology for increased sales

Improved Productivity

A timeless adage in business is, 'happy employees translate to happy customers'. Ensuring that the sales team is motivated and productive at all times is crucial for sustained business growth, since it is one of those departments that have a direct impact on the bottom line. An automation solution can assist organizations in encouraging the sales team to close more deals.

Most automation solutions offer self-service capabilities that help sales teams in building, running and monitoring their own workflows, without having to depend on the IT team. Whether it is assigning permissions to access a database or moving bulk data between apps, sales representatives can create customized workflows to make work faster and eliminate project bottlenecks.

Automation has the ability to perform a variety of tasks within minutes, without compromising the quality of service. Sales teams can save more time every day by automating several sales processes including lead creation and prioritization, meeting scheduling, invoice generation, order processing, payment collection, email follow up, reporting, and many others. They can even schedule calls and send messages to leads with a single click using the power of automation. This offers a huge time saving benefit to the sales team and allows them to focus on high-priority tasks, such as, designing new strategies for increased conversions.

Better Lead Management

Consider a typical sales team in any organization. Sometimes, sales representatives may miss posting an update in the sales CRM application due to their overwhelming workload and targets. This usually results in a situation where different team members end up working on the same lead. When multiple sales representatives inadvertently contact and pitch to the same customer, not only does it foster unhealthy competition and irk the customer but also makes your company look disorganized.

This is just the tip of the iceberg, the symptom of a much larger problem. Over a period of time, the reality is that many leads often go to waste. A lot of sales teams put greater focus on getting more contacts and prospects rather than nurturing existing leads. Of course, this is not a bad practice but if a good number of leads do not convert, all the effort and time invested by the sales teams becomes futile. The core of effective lead management is to empower the sales team with the right resources that will enable them to respond to leads in real-time.

With workflow automation, sales teams can have their applications and databases updated automatically in real-time. Automation leaves no room for errors and ensures that all leads and customers receive a positive experience during each interaction. With automated workflows, organizations can avoid confusion and create better communication between their sales representatives, allowing them to address individual leads and efficiently convert them into new customers.

Data-Driven Sales Strategy

In this age of 'consumer parallelism', customers wander freely across different platforms and devices to find the best deal. The path to purchase now spans across multiple touch points and involves interactions with multiple teams. For any sales rep, making sense of these raw stacks of data scattered across different channels and platforms is like bailing out the ocean with a bucket. The solution to this is simple – cross-department collaboration and collaborative selling.

According to a 2016 Salesforce report, 73% of sales teams believe that cross-department collaboration is critical to the overall sales cycle. With an automation solution, organizations can enable collaborative selling to provide sales teams with a unified, 360° view of the customers, and help accelerate the customer's purchase decision.

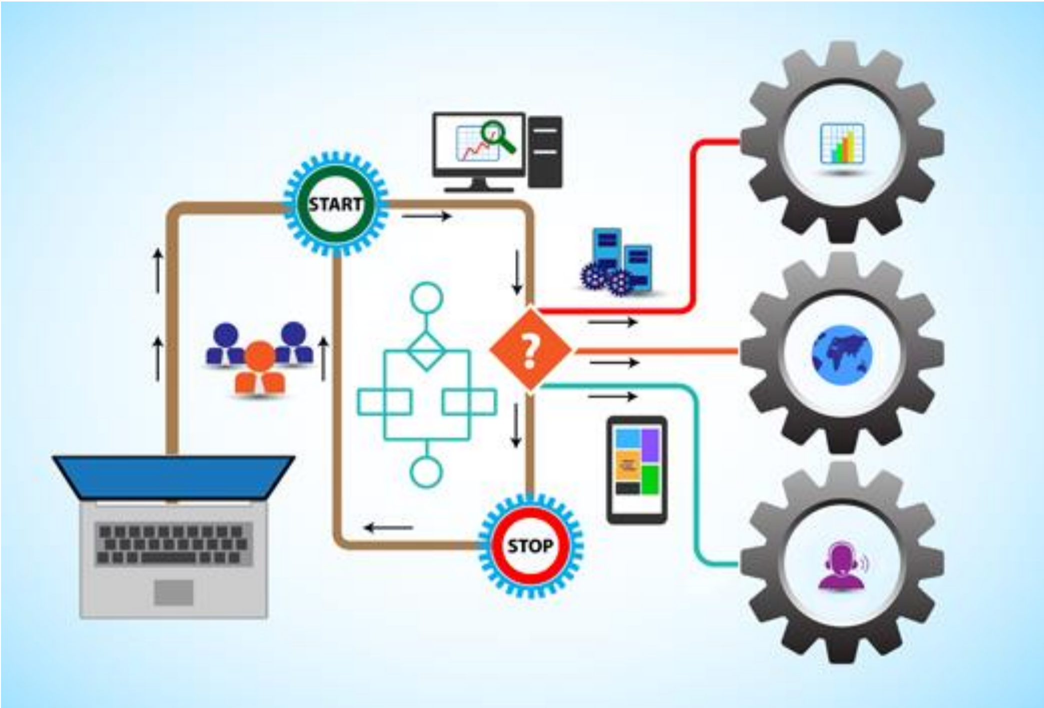
Simplified order management

An efficient order management system is fundamental to creating satisfactory customer experiences. Ill-organized order management processes can cause errors and delayed payments, ultimately resulting in a possible loss of sale. Over time, this is bound to hurt your company's revenue earnings.

Using an automation solution, sales teams can resolve this issue and make order management a breeze. An automated order processing workflow can substantially simplify the demand-supply chain. Organizations that upgrade their systems from paper-and-pencil to integrated order processing are likely to experience, on average, a 25% gain in overall productivity, a 10-20% gain in space use, and 15-30% more efficient use of stock.

In addition to order fulfillment, automation can also be useful for streamlining returns. The post-sales process is as important as getting the first order. Manually operated refunds are usually muddled and can take several days to process. With automation, sales teams can prevent this issue and provide customers with greater visibility on the order status and the refund processing. This kind of transparency helps businesses increase their brand’s goodwill and eventually translates into more sales.

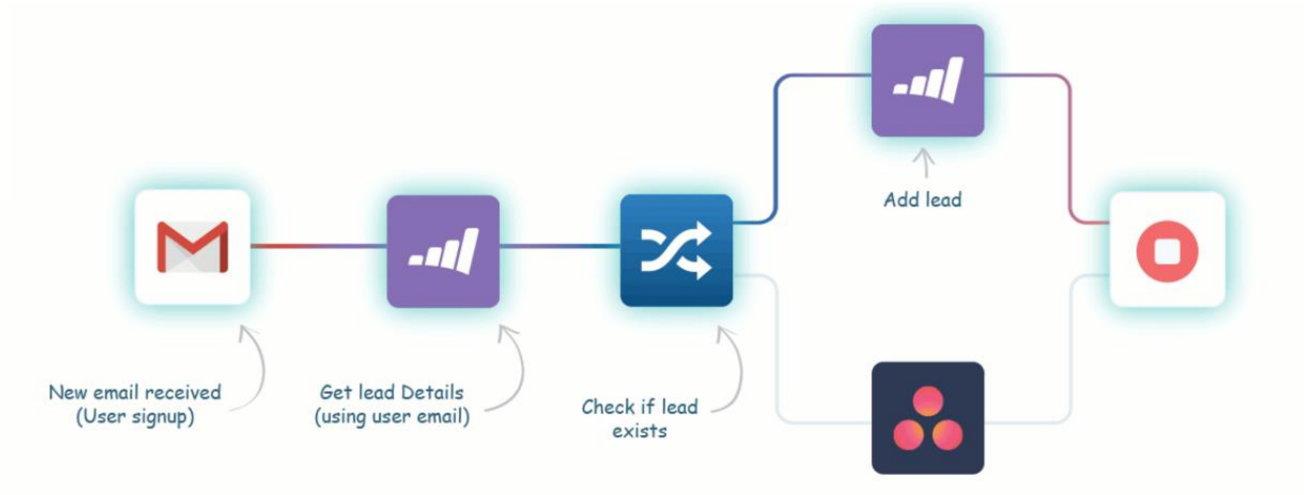
THE BEST TOOL FOR SALES PROCESS AUTOMATION: IPAAS



Hiring and retaining a team of developers to write custom integrations for automating the sales process can be expensive and time-consuming. The best way to achieve automation is to adopt an Integration Platform-as-a-Service or iPaaS.

iPaaS connects software applications deployed in different environments to automate repetitive tasks, facilitate smooth data exchange and reduce complexity in processes. Typically, every iPaaS platform provides an 'if this, then that' scenario; with pre-built connectors and conditional logic that simplify the creation of integration workflows.

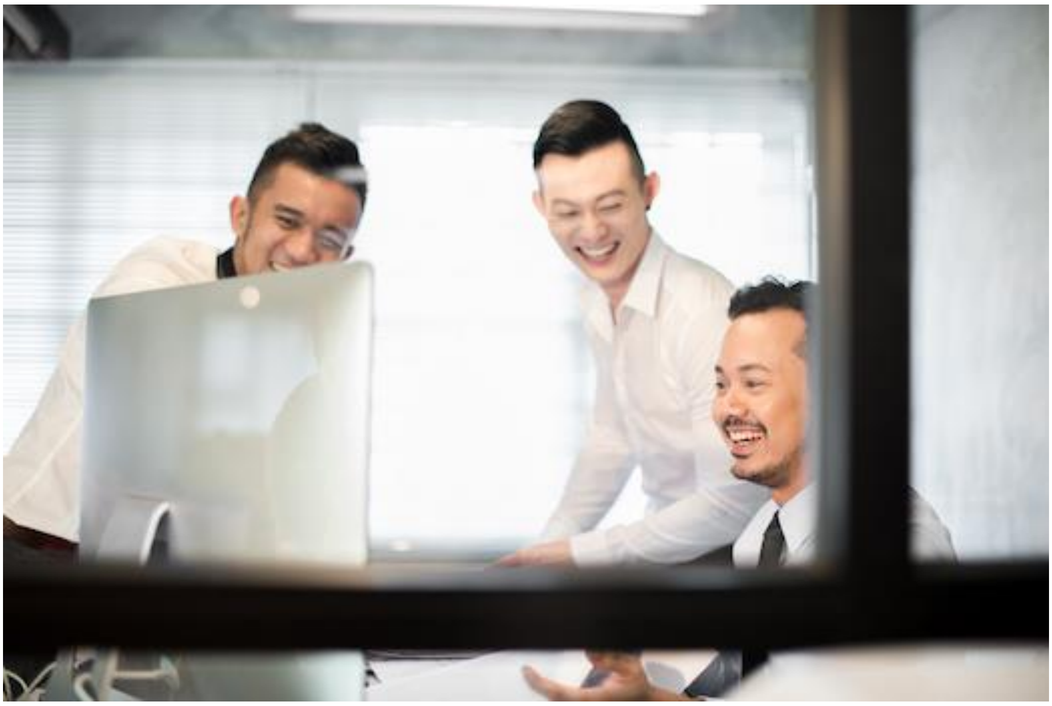
In a fast-growing market where competitors are fighting for market share, the time-to-market is of critical value. Using an iPaaS, organizations can shorten this time from months to just a few weeks. An iPaaS offers the ability to connect different sales CRM applications and centralizes the data scattered across departments, platforms, and processes - all in a matter of minutes. This increased visibility can help sales teams in eliminating issues of data duplication, speeding up workflows, and grabbing more sales opportunities at the right time.



Built.io is an enterprise-level integration platform that offers pre-built solutions for all business processes. Its hybrid architecture links legacy systems with cloud applications and allows sales teams to build complex, multi-step, multi-app workflows, with zero code and in just a few clicks. Just imagine all of your organization's departments being integrated in a way that they work together with the same data to achieve higher conversions.

Some of the top features offered by Built.io are:

- Zero setup
- Self-service integration platform
- Visual, intuitive, drag-and-drop interface
- No coding experience required
- Broad connectivity with 180+ services
- 700+ ready to use workflows
- 100% cloud-based infrastructure
- Quick and reliable scaling
- Metrics and logs to track historical data
- Lifetime free Individual plan + SaaS model lets you pay as you go
- SOC-2, Type-2 compliant organization
- Phone and email support



Sales involves a number of people working on different tasks, such as, prospecting potential customers, order processing, report creation, customer account management, database updating, follow-ups, resolving queries, sealing the deal, and the like.

With automation and integration, organizations can easily optimize this entire process to generate more sales, twice as fast and with half the effort.

Here is Built.io's 3-step plan.

1. **Supercharge Your Demos**

Leverage integration to make wowing prospects easier.

Customize demos - Instead of talking through a slide deck, tailor your pitch and demo to your prospect's exact scenario using our drag-and-drop interface. Swap out services or add connections in real-time.

Prove value - Seeing is believing. Integrate multiple services and exhibit your product in action without spending time on creating a POC. This way, you can quickly move past the "will it work with ___?" question.

2. **Connect Your Business Stack**

Streamline and optimize your stack by integrating all your tools together.

Better customer service - Never let a lead slip through the cracks. Automate long-tail customer engagements and leverage your data sources to tailor sequences to your lead's specific needs and interests.

Analytics - Unify all meaningful data into actionable information. Connect your services to gain insight about how your leads interact with your website, product, and sales team.

Reporting - Automatically generate reports and avoid spending hours digging through notes and systems to produce daily, weekly or monthly reports.

Agility - Deploy your services at the speed of business. Instead of spending months relying on a services integration team, build robust integrations between systems tailored to your business needs. Adapt and react to changes in the marketplace or business processes in hours and days instead of months.

3. Connect Your Company's Systems

Help connect all the departments within your organization.

Unify teams - Keep sales, marketing, DevOps, customer success, and finance teams in sync by connecting systems to pass data from various services through integration.

Keep your favorite tools - Developers prefer Trello but marketing teams likes Asana. Leveraging Built.io and team collaboration applications like Cisco Webex Teams or Slack can make it easy for each team to use their own tools, while still unifying data.

POPULAR SALES-CENTRIC WORKFLOWS

Now that you have learned about Built.io's 3-step process, here are some ready-to-use templates to get you started.

1. **SugarCRM with Pipedrive and Cisco Webex Teams**

   Get notified about new leads in real-time

   Whenever a new contact is created in your SugarCRM account, Built.io automatically adds the contact as a person in your Pipedrive account and sends a notification to a specified space in your Cisco Webex Teams account.

   IMPORT THIS WORKFLOW

2. **Pipedrive with Asana**

   Target prospects while their interest is at peak

   When a new deal is created in your Pipedrive account, Built.io automatically adds that deal as a new task in a specified project in Asana.

   IMPORT THIS WORKFLOW

3. **Pipedrive with Outreach**

   Keep track of each stage in the customer journey

   When a deal is updated in Pipedrive, Built.io automatically updates the associated prospect in Outreach. If the prospect does not exist, Built.io creates a new prospect in Outreach.

   IMPORT THIS WORKFLOW

4. **Salesforce with Marketo and Outreach**

   Automatically have your leads synced across multiple sales CRM tools

   When a user is updated in your Salesforce account, Built.io checks whether the email ID of the user matches the email ID of a lead in Marketo. If the email ID exists, Built.io upserts the details of the lead in Marketo. Next, it fetches the list of prospects in Outreach and checks whether a prospect exists with the email ID of the user. If the prospect exists, Built.io automatically updates the details of the prospect. If the prospect does not exist, Built.io creates a new prospect with the user details in Outreach.

   IMPORT THS WORKFLOW

5. **Nexmo with Salesforce, Zendesk and Slack**

   Make follow up easier with automation

   When a new SMS is received in your Nexmo account, Built.io automatically converts the incoming phone number format to the Salesforce phone number format using Node.js Code action.

It then retrieves the list of all leads from your Salesforce account to check if any phone number matches the incoming phone number.

In the next step, the Switch statement takes an action based on the conditions set.

Condition 1: If the customer from whom you received an SMS exists as a lead in your Salesforce account, Built.io automatically performs the following steps:

- Creates a new ticket in your Zendesk account with high priority status
- Sends a notification to a specified channel in Slack
- Sends an SMS via Nexmo to the customer notifying them about the status of the issue
- Updates the record of the ticket in your Salesforce account

Condition 2: If the customer is not a lead in your Salesforce account, Built.io creates a new ticket in your Zendesk account and sends a notification to the specified channel in Slack, notifying the agent about the ticket.

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6. Salesforce with Zendesk

Sync Salesforce and Zendesk records seamlessly

i. When a new organization is created in Zendesk, Built.io automatically checks if it exists as an account in Salesforce. If it does not exist, the workflow creates a new account in Salesforce.

   IMPORT THIS WORKFLOW

ii. Whenever a new contact is created in Salesforce, Built.io verifies whether that person exists as a user in Zendesk. If the user does not exist, the workflow creates one in Zendesk.

   IMPORT THIS WORKFLOW

iii. When a new ticket is created in Zendesk, Built.io checks if it exists as a case in Salesforce. If it does not exist, the workflow creates an associated case for the ticket.

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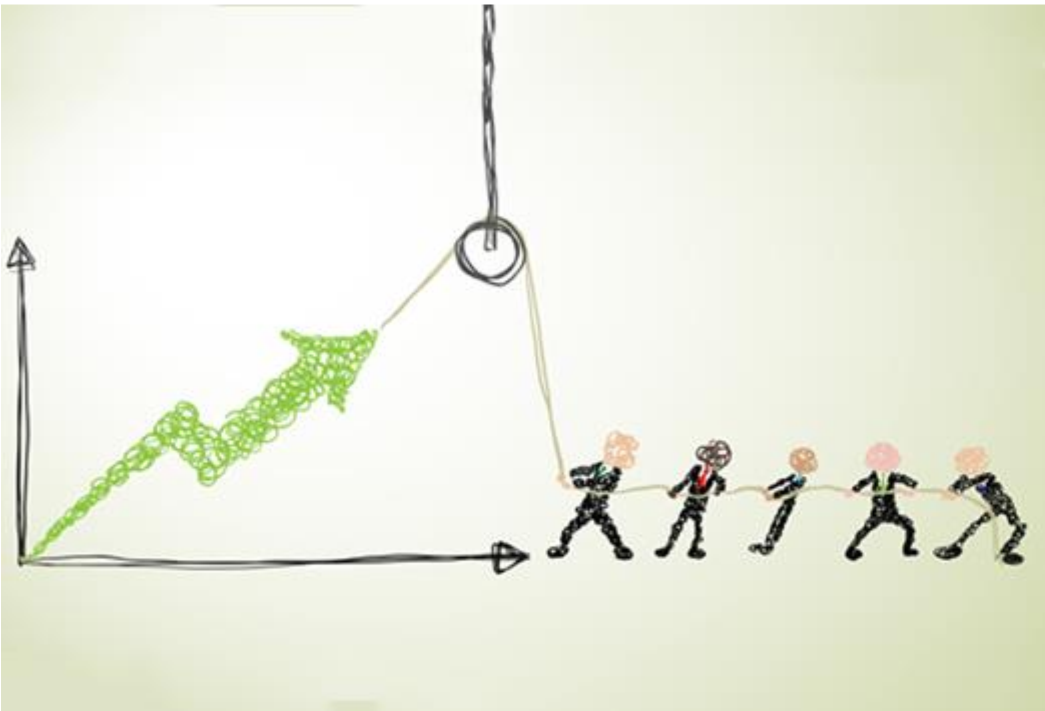
5 Actionable Ways to Boost Sales



At the start of this eBook, the focus was optimizing the sales process using automation. Now that you have understood how to go about it, here is a bonus chapter.

While automation and integration have the power to make work faster and easier, adding sales best practices to this mix can help sales teams design better strategies for growth and achieve measurable success.

Here is a list of 5 such best practices.

1) Focus more on building customer relationships

Katherine Barchetti, a well-known upscale retailer states, “Make a customer, not a sale”.

As a sales professional, your sole focus should be your customers. Let selling be an effortless process. Build a strong relationship with leads, so that they feel encouraged to turn into loyal customers. Achieving this is not an overnight process. With each new opportunity, you need to invest a number of days – introducing them to the features of your product, building trust, guiding them, and eventually convincing them to make a purchase.

2) Use CRM tools wisely

Most organizations use multiple CRM tools for better management of their sales pipeline. Though beneficial, using multiple tools will be of no use until everyone who uses the software understands all that it can do for them. CRM tools do not have to be limited to its standard use of tracking customer interactions. With some creativity, sales teams can effectively extend the capabilities of the CRM to other applications. Additionally, synchronizing the data across multiple CRM tools can support the sales and marketing teams in working together as a cohesive revenue generating unit.

3) Reduce the time spent on administrative tasks

To allocate more time to relationship-building and closing deals, sales teams need to reduce the time spent on administrative tasks like updating the database, collation of information spread across different platforms, etc. According to Forbes, nearly two-thirds (64.8%) of a rep's time, on average, is spent on non-revenue-generating activities. If this time is instead invested in selling, businesses will certainly witness an increase in their revenue. It is crucial to develop a strategy for replacing such repetitive tasks with a streamlined process that automatically logs new information into the system.

4) Improve internal coordination and communication

Miscommunication and lack of coordination are often neglected issues that crop up unexpectedly and lead to the loss of a potential customer, which is why it is important for each sales representative to know whether their peers have been communicating concurrently with a lead. The interactions a sales person has with a customer can only be seamless when the internal communication across the organization is in sync. Organizations can deploy a real-time collaboration platform to notify different teams about the progress of a customer's journey. Just imagine when the marketing team brings in a new lead, the sales team gets notified and the CRM is updated in real-time.

5) Strategize and prioritize

Cold calling on its own does not guarantee sales. A sales team cannot achieve the set target by simply calling the contacts from the database. Build a strategy around each customer and stick to it. Speak to them regularly. Follow up. Listen. Understand. Give them solutions to their problems.

Also, make sure that revenue-generating leads remain your priority. Do not pursue every prospect that looks like a potential customer. Instead of chasing a customer who would buy a $10 product, invest the same time in the one who would be willing to buy a $100 product.

CONCLUSION

The digital world can be overwhelming at times, growing more each year with countless services being added every day. Sales teams are tackling with information overload. With automation, you can effortlessly simplify this process and get your employees ready for next-generation digitization.

If you are looking for a digital transformation partner, sign up with Built.io today.

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