Salesforce Wants Reps to Work Smarter

By Virginia Backaitis | *Feb 12, 2016*

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Salespeople obsess about winning. Give them a quota to hit and they'll start building a plan to bring it in. It might consist of a hit list, ideas about what products to pitch and to whom, a look into their pipelines to see what they might be able to pull forward and so on ….

It (still) kind of works, but it's so 1960.

And while most sales reps today use a CRM system of some sort to help plan next actions, the actions are more often dictated by their gut rather than driven by their data.

Why Guess When You Have Data

In other words, they guess. At least that's what Jamie Domenici, vice president, marketing, Salesforce Analytics told CMSWire. And while we don't want to discount the value of having good sales instincts, "hunches are good, but data is better."

In days gone by data was locked in spreadsheets — often inconsistent, difficult to trust and to take action on. That has begun to change, notably with the introduction of tools like Salesforce Wave Analytics, which aim to give sales reps a seamless way to access, analyze, visualize and act upon data via a few clicks of the mouse or taps on a mobile device.

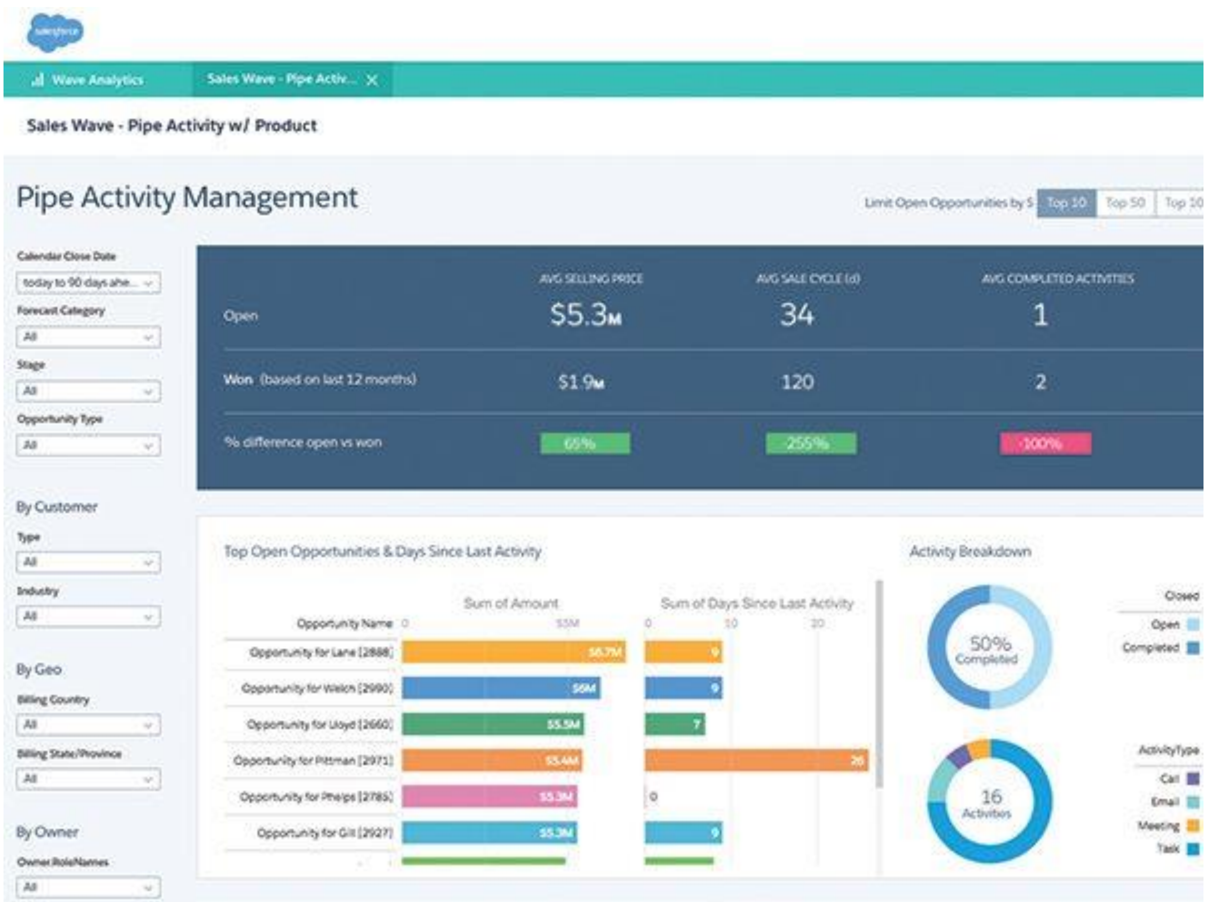
Paradise By the Dashboard Light?

And Salesforce is apparently succeeding in this regard. Wave Analytics debuted last week in Gartner's Magic Quadrant for Business Intelligence and Analytics Platforms, where self-service and flexibility are highly prized.

Starting this week, Salesforce Wave customers have access to three new productivity dashboards.

Domenici gave us a quick tour and explained the value of each:

Pipeline Activity Management: It’s easy for sales people to get so wrapped up in one deal that they forget about another, which might be just as likely to close. There’s a rhythm to success — key performance indicators (KPIs), average stage duration, average sales cycle and average of completed activities are good benchmarks to help you find the beat.



Upcoming Opportunities to Close: Some of us had a section on our report cards when we were kids that rated us on “spending time wisely.” Those who focused on the task at hand made high grades. Sometimes it can become hard to know where to focus your efforts with data, which brings on analysis paralysis instead.

“Upcoming Opportunities to Close” provides clarity. With it, salespeople can drill into open opportunities and associated activities, including logged tasks and upcoming events, in order to identify which deals need to be pulled forward and where to focus attention in order to close deals.

Productivity and Leaderboard: What’s the key to hitting your quota? Is there a magical number of calls, emails, tasks or meetings you need to make? What’s the difference between what you do and what the rep who keeps buying new Porsches does?

There’s a method to the madness and keying into it and into the activities of your team members who bring the deals in can prove to be useful. Plus, according to Domenici, the insight is only a few taps away. A few more taps and it's part of your action plan.

Work Smarter

The idea of “working smarter” takes on an entirely new meaning in the age of data because data can be gathered, cleaned, analyzed and insight can be visually displayed in front of you in seconds. In-app dashboards promise huge wins because answers are there when you ask the questions, not hours, days, or weeks later when a business analyst or IT hands you the report.

The big question now is whether that sales reps and managers who get the information will use it or continue relying on their guts.