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7 Steps to B2B Inside Sales Success – *Part 2: Implementation*
By Mary Gospe

In Part 1 of ***7 Steps to B2B Inside Sales Success***, we looked at three critical planning steps: 1) setting the strategy, 2) defining roles and responsibilities, and 3) determining how you will measure and reward success. We continue our discussion in Part 2, by looking at implementation best practices, including creating a sales playbook, procuring tools, hiring and training, and managing for success.

Step 4. Create a sales playbook
Before you hire new or replacement inside sales or sales development reps, create a sales playbook. This vital selling tool typically has the following sections:

- **Internal strategy and processes**: the company's sales model, sales process, roles and responsibilities, territory assignments, CRM processes and forecasting guidelines
- **The go-to-market strategy:** target market, key messages, competitive positioning, value proposition, marketing campaign summaries
- **Call guide:** sample greetings, voice mail messages, email templates, probing questions and objection-handling tips for various target verticals and/or buyer types

The sales playbook is a crucial document for ramping inside and sales development reps as well as new field and channel reps. It should be viewed as a "living document" and updated on a regular basis to address new product/services offerings, competitive threats or selling processes. Ideally, it should be made available online for easy access, searchability and frequent content updates. For more information on sales playbooks, see Mary Sullivan's article "Sales Playbooks Help Shorten the Sales Cycle."

Step 5: Procure tools
In addition to a CRM system such as Salesforce.com, think about other tools you may want to procure to help the team work efficiently and effectively. There are many Sales 2.0 tools available today such as Jigsaw and LinkedIN for researching contacts, InsideView and Hoovers for company and industry intelligence, and Web analytics tools such as LeadLander that notify sales reps when a prospect is on their website.

Step 6: Recruit, hire and train

- **Determine the location of the team.** Some companies have HQ-based teams. Others, have a combination of HQ-based and remote reps. For new teams, I recommend hiring reps who can work in the same office as the manager. This allows the manager to monitor activity, listen in on calls easily, conduct in-person training on demand and answer questions as they come up. For more established teams with proven processes and performance benchmarks, remote reps are fine and actually can save the company money if they work out of home offices and live in an area of the country were the cost of living is cheaper.

- **Determine the skill-set of new hires.** You may want to hire a seasoned sales development or inside sales rep with experience in your industry who can hit the ground running. Or, you may want a person younger in their career who has the fire in their belly to sell but needs sales and industry training. Of course, that decision will be based on your headcount allotment and compensation budget.
- **Interview as if you are a prospect.** A technique I like to use when interviewing is to conduct the first interview via phone. Since this is a phone-based position, it gives you a chance to determine if the candidate can think on his/her feet, can articulate clearly and has a nice phone voice. Next, have the candidate send you an email as if you are a prospect. This will enable you to assess how well the candidate writes (exceptionally important) and whether they craft a compelling message and call to action that addresses a prospect need.
- **Conduct boot camp.** If you've hired more than one rep at a time, conduct a multi-day session to train the new hires on corporate processes, products and services and selling best practices. Leverage the sales playbook content and conduct role-playing exercises in person and via phone to help reps work through typical selling scenarios. Have the new hires shadow an experienced rep or two if available, and for sales development reps, have them sit in on calls and product demos with their field-based partners.

Step 7: Manage for success.
One of the biggest mistakes companies make is to let their inside sales or sales development teams self-manage. They may have a manager but if that person is traveling all the time, or has never managed an inside group before, results will suffer. Successful teams have a manager/director/VP who is hands-on and can monitor and coach reps and refine processes to continually optimize the function. It is also important that the leader work closely with his/her marketing and sales colleagues to align lead generation and nurture campaign activities, pipeline-building requirements and revenue goals.

Inside sales and sales development teams are a critical component to B2B sales strategy. I hope these strategy and implementation best practices help you build or refine a winning organization.

About the Author:
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