



# INSIDE SALES 2021

## 10 STEP GUIDE

For Sales Leaders



**INSIDE SALES TEAMS (IST) HAVE NEVER BEEN UNDER SO MUCH PRESSURE TO PERFORM. THE EVENTS OF 2020 HAVE ACCELERATED THEIR IMPORTANCE IN B2B ORGANISATIONS AS FIELD SALES AND INSIDE SALES MORPH INTO ALL BUT THE SAME ENTITY.**

IST need to finally balance many key attributes to ensure they always perform at their most productive and commercially efficient optimal level whilst also providing the most satisfying customer experience which drives ongoing customer loyalty.

With ever changing and evolving sales enablement technology entering the space, an increase in marketing automation generating demand and continued commercial pressures on performance, we've produced a [10-step guide](#) for b2b organisations to consider when planning their 2021 IST strategy.

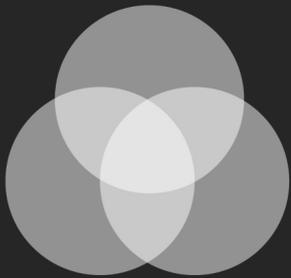
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# PROSPECT BLUEPRINT (DATA, TARGETING, AND OPTIMISING AI TO PRIORITISE EFFORT)

Understanding the **size and scope of your target audience** is mission critical to IST commercial optimisation. IBM have stated that on average b2b organisations are utilising data to just 5%\* of its capability and within the prospecting and IST arena this is probably more like 2%. That creates huge levels of **commercial inefficiencies** which in 2021 and beyond can/will no longer be deemed acceptable.





Scoping out properly who you can do business with (including understanding the commercial positive or negative of different prospect groups) and then using the most modern AI driven routes of obtaining that data (including pulling in intent driven data sources), provides IST with a far more strategic, commercially efficient and **prioritised starting point** than just blanket calling into 'old school' bought in data 'lists' derived from SIC codes that are out of date and nowhere near accurate enough for 2021 b2b marketing.

It is then the job of the IST to then constantly work this data and append intelligence to it which cannot be purchased off the shelf... your prospect universe is now being built and this in itself will become IP worth significant £££ to your organisation from which when combined with AI technologies now available that predict industry and economic market changes before they happen will provide your business with bullet proof sales forecasting.

Through investing NOW in your data strategy and methodology, your IST resource will be both aligned overall i.e. how do you know you need xx Inside Sales Representatives (ISR's) when you actually don't know the size of your prospect universe? AND aligned and allocated to sector 'specialists' from which you then accelerate enhanced and more targeted ISR training and coaching.

## KEY TAKE-OUT

In 2021 b2b organisations **MUST** invest in their data strategy to stimulate and accelerate their growth strategies and thus enable the IST to operate more efficiently and productively. AI can now significantly accelerate this process and needs to be understood fast to enable IST to be fully optimised and unlock growth.

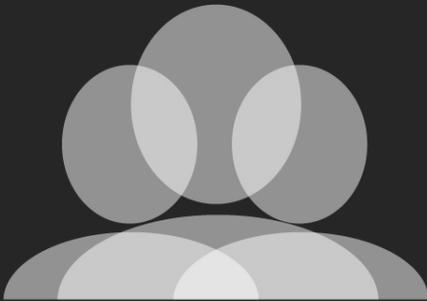
\*IBM Watson Global Analysis Report 2019

# RESOURCE ALIGNMENT - TO THE SIZE OF YOUR UNIVERSE + CLARITY OF UNDERSTANDING ON WHAT YOUR OPTIMAL OUTPUT IS

Having worked with IST's across a variety of b2b sectors for over 20 years, we have always found it eye opening about the rationale and 'science' that has been applied to the sizing of IST. 'Funnel' mindset (driven by the mentality that there is an endless pot of data) appears to have been dominant in a lot of cases.



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Equally there have also been cases where it is clear (for whatever reason) that there is a distinct sub-optimal volume of IST which ultimately means less market penetration and perhaps suggests a lack of confidence in the role of the IST within the organisation.

IST resource alignment can only truly be realised when both the prospect universe has been sufficiently scoped, and your organisation has a thorough understanding of what optimised output looks like (driven by the universe, quality of your Inside Sales Representatives, ongoing coaching + L&D, technology, strength of the proposition and industry leading KPI's). This of course takes time (but can be done over a rapid 3-9-month cycle) to implement and understand so it's important that all you follow all steps in this guide simultaneously to help steer what is a commercially viable 'line of best fit' for resource sizing of your IST.

This line of best fit should be driven by what is achievable in your 2021 IST delivery strategy and the commercial targets being assigned to the unit. What is important however is that some upfront consideration and investment is put into the data strategy sooner rather than later so that your resourcing is based on a good degree of data science even if its initially a headline view.

## KEY TAKE-OUT

Data remains critical to your resource alignment and investment is rapidly needed in this area so that you both maximise the revenue potential from your prospect universe AND you align the appropriate IST FTE.

# RECRUITMENT - FINDING THE BEST TALENT

Finding good IST talent is always a challenge, but in 2021 it needs to remain an **ongoing priority** for your overall IST strategy. Whilst it should always be your intention to retain and develop your IST you also have to be accepting that you can't always retain and develop + promote everyone and that your ambitious ISR's will typically be using your organisation as a stepping stone for their sales career.



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Your recruitment strategy and indeed your culture and belief in your product/service should be driven by the knowledge that good ISR's have an average tenure of 18-24 months before you either move them into new sales related positions or their own career ambitions moves them on....but that's fine so don't fight it. Accept it and embrace it.

Equally your recruitment strategy and overall IST management strategy (driven by best in class KPI's and L+D) should also bear in mind that not every ISR will make the journey so indeed a solid ongoing recruitment strategy maintains pressure on poor performing IST's and if done in the right way creates the right performance culture you need to adopt to maintain growth.

**IST recruitment strategies need to be driven by the following:**

- **Stand out advertising** - Making sure your brand and proposition is attractive and interesting. Never undersell what you do or make apologies for who you are. The art of sales theatre is never so important when trying to entice that very same audience - salespeople!
- **Clear outline of package** and clarity on OTE (believable and backed up with evidence where necessary).

- **Outline of career development** opportunities including your training and support programmes (more on that later).
- **Communicated and personalised** across the right social channels and innovative/local mediums which will have strong cut through with your target audience - don't be afraid to advertise in unique places and be different. It all helps to create your pull factor with your target audience.

All of the above can of course be outsourced to specialist sales recruitment agencies but in doing that you are not only expediting great cost (particularly when you have high vacancy occupancy rates) but not allowing yourself to be in control of the process and risk corners potentially being cut as the pressure to find quality high performing people increases.

## KEY TAKE-OUT

Your ISR's are the engine of your business. Put solid emphasis on your recruitment strategy maybe even hiring a talent/recruitment manager and do not leave anything till the last minute. A sustainable recruitment strategy will future proof your sales growth.

# ONBOARDING

## - INVEST HEAVILY IN YOUR PEOPLE TO REAP THE REWARDS

The first few days and weeks and the impression they make on your new ISR's will set the tone for how they settle in and ultimately perform for the next few months.

High quality training and onboarding are often the fundamental element to accelerated ISR performance. Get it right and you will embrace fast output and productivity. Get it wrong and you will quickly find yourself in a constant cycle of retrain and rehire.





Onboarding needs to cover the basics and should typically last 2-3 weeks depending of course on the complexity of the product and technology involved:

### COMPANY INDUCTION

History/What you do/What you sell/Vision for the future + why are they here – Make it visual, make it interactive... ideally you need to involve Senior people in this process... maybe even the CEO/MD/ Founder. There is no better way for ISR's to feel the love from day one then hearing the passion of the business from the people who started it.

### PRODUCT DEEP-DIVE

Next you need to get into the product. High level followed by a deep dive. These sessions need to be highly interactive and use reflective quizzes to ensure you are confident the team have understood.

### TECHNOLOGY TRAINING

These sessions need to be highly interactive and demonstrate detailed training into all the technology platforms used in your IST delivery from CRM to Sales Enablement.

*All the above documentation needs to be drawn together, branded and made to look professional and established. Again, this is the first impression your ISR team will have on both you as a management team and as a business. Invest real time in pulling together an inspirational onboarding pack and experience!*

### ONBOARDING ASSESSMENT

To wrap up the induction programme you need to ensure you have the right assessment process in place. No ISR should be allowed to go live on the programme until they have passed an rigorous assessment process that not only gives you confidence they are ready to go live but also gives the ISR confidence that they can now get into the role they are brought in for. Sales is 100% all about confidence.

## KEY TAKE-OUT

Onboarding your IST properly can accelerate performance and output from day one. Get it wrong and you will quickly lose management time and often be rehiring sooner than you know causing huge business inefficiencies which you can ill afford.

# PROPOSITION - YOUR SELLING STORY AND WHY IT'S SO IMPORTANT

The selling story is what we, salespeople, all get (or at least should do!) excited about. It allows us to **create the 'theatre'** which we get out of bed for. If it is not created and executed properly then straight away that theatre factor starts to lose its potency. A poorly executed proposition is often open to interpretation and dilution from ISR's and often is not adaptable sufficiently across different sectors and target markets.





Your IST relies on the proposition to drive its excitement, culture and ambition. We have seen countless examples over the years of the sales proposition becoming complex and diluted and losing what it set out to master when it was first developed. There's lots of reasons why that happens... but what's important is that b2b organisations realise that their selling proposition needs to be under constant review to stay relevant, concise and cut through enough that ALL ISR's are capable of delivering it consistently. The selling proposition remains the lifeblood of IST's very purpose.

In constructing the proposition, the IST leadership and management team must undergo an appropriate and robust strategic process that defines why their product and service remains unique in the marketplace and how it provides clear stand out from competitors and in 2021 how their proposition has relevance to the current economic times.

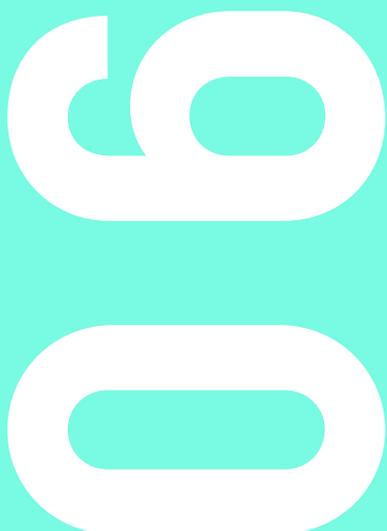
After this the proposition needs to be dissected and personalised appropriately across different sectors and channels without losing its overall headline cut-through... the line for it to become quickly diluted and fiddled with is very fine so IST management teams definitely need to review both its overall selling proposition and how they train it into their teams as part of their 2021 strategy.

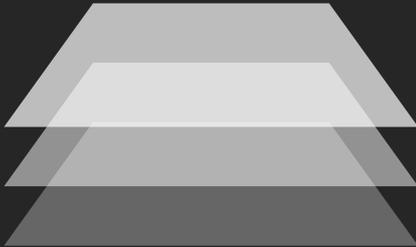
## KEY TAKE-OUT

Having an attractive and inspiring selling story is the lifeblood of your IST. Take the time now to review it, put it through the right strategic process and ensure its still fit for purpose for you to realise your commercial objective.

# TECHNOLOGY - HOW TO IMPLEMENT AND OPTIMISE THE RIGHT 'TECH STACK' FOR YOUR IST

In 2020 the marketplace is awash with technology solutions all supposedly designed to **accelerate the performance** and productivity of your IST. Many claim to have the ability to offer a 'end to end' capability to deliver all parts of your IST strategy but, they never do.





Obtaining the right IST Tech Stack can also often come with significant internal procurement and departmental lag which means the commercial benefit it's meant to bring to the organisation is delayed and in my experience can also turn into huge 'transformation projects' which in 2021, and the advancement and compatibility of technology should certainly not be the case.

Any technology implemented into an IST should be aligned with clear commercial impact and any technology provider that cannot be clear on that impact should not be engaged into your IST strategy. The key Tech Stack components for an IST are as follows:

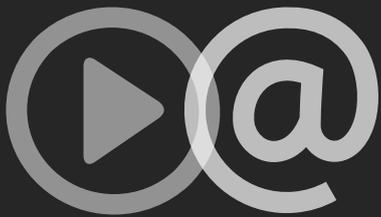


### CUSTOMER RELATIONSHIP MANAGEMENT

This is the central mainframe system that holds together the data and controls the pipeline stages of your sales process and customer journey. In 2021 b2b sales growth strategy the CRM system should be used parallel to a 21st century sales enablement tools which the IST should use to run their day to day activities.

The CRM system should not be mistaken as a operationalised system the IST use every day... the majority of CRM systems (including Salesforce to a greater or less extent) are not set-up to enable effective outbound voice and cadencing sequencing (see below) therefore need to be used as part of a fully integrated 'tech stack'.

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### **SALES ENABLEMENT SYSTEMS + PLUG-INS**

Sales enablement systems plug directly into your CRM and should be the core system that your IST use to operate from. New to market sales enablement systems combine the very latest email and video (video cadencing have a 30% higher open rate than standard email cadences) personalised cadencing alongside inbound and outbound voice technology to give your prospect nurture strategy a 21st century feel and ensure your entire prospect buying journey is optimised with automated regular and personalised touchpoints.

Your Sales Enablement tool also needs to include call recording and monitoring software which in turn drives your quality measurement and learning and development initiatives.

The personalised 121 automation should also be enhanced with inclusion of direct relevant industry news feeds which ensures your prospects are continually receiving content which is relevant to them and in turn this will significantly improve your lead and sale conversion rates.



## MARKETING AUTOMATION + RELEVANCE TO YOUR IST

IST teams also need to be fully aligned to the wider company marketing automation strategy. In 2021 Email and social automation need to play a central role to talking to your prospect universe on mass and ensure relevant sector specific and industry content is served across ill planned out email automation journeys.

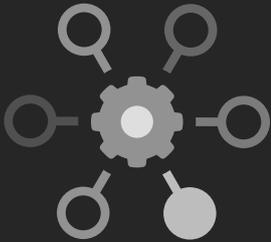
Your tech stack needs to ensure that your marketing automation platform is 'plugged-in' via API's into your sales enablement tool so that ISR's are notified when prospects reach a lead score generated through ongoing engagement with automated email journeys allowing them to engage in real-time with prospects who are engaged at that moment in your product or service.

Email automation in 2021 can be highly sophisticated and personalised but again needs to be heavily reliant on having a robust data strategy in place in the first place - emphasising again the points raised in step one of this guide.

AI is rapidly changing the possibilities of what is achievable with email automation so make sure your email automation provider is keeping you abreast of how they are constantly evolving their product with AI technologies. If they are not, then the result is that your automation and subsequently IST performance will not be being optimised to its full potential.

*For IST's the automation mix should be a combination of 121 automation obtained from your sales enablement tool and mass automation obtained from your marketing automation platform. They both need to be aligned to the commercial objective and be aligned in their mission to enhance the prospect journey and improve lead and sale conversion rates.*

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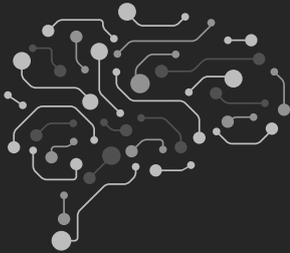
## DIALLER (OR NO DIALLER)

Diallers remain a hot strategic topic for most ISR leadership teams. Designed originally to rapidly improve outbound performance at often no care whatsoever on customer experience or prospect saturation, their purpose in a more strategically astute 2021 is now perhaps up for questioning.

Diallers, particularly traditional Progressive diallers, for the most part operate again within a 'funnel' mindset... i.e. there is endless pot of data I can just continue to hit time after time until someone answers or someone says no. Everything we have discussed in this guide focusses on a more strategic and commercially focussed data driven approach which IST's should be implementing in 2021. Diallers can still play a part in this approach, but existing dialler technology may need to be re-evaluated to ensure its still relevant to your 2021 strategy.

Perhaps the more usable 'softer' dialler technology which are more adaptable to b2b consultative selling are preview or poor diallers which provide control to the ISR whilst speeding up wrap times and idle times. These diallers ultimately ensure your IST does not 'burn' through valuable data and damage your brand and prospect experience in the process but also improve overall ISR productivity levels.

Already many sales enablement tools entering the market are including some dialler capability within them, but most if not all will still only be as effective as the data (and subsequent data strategy) going into them emphasising again the importance of a robust data strategy within your IST 2021 strategy.



## ARTIFICIAL INTELLIGENCE AND WHAT IT CAN DO FOR YOUR IST IN 2021

The final element of your 2021 Tech Stack needs to be understanding the role AI can bring to your IST operation and how most importantly machine learning can accelerate your productivity and identify quick efficiency gains.

AI technologies in 2021 can firstly accelerate and prioritise all parts of your data strategy to ensure your efforts are only ever focussed on prospects with the highest propensity to purchase.

Machine learning can now allow you to rapidly amalgamate and segment all your data touchpoints to give you a rapid single customer view which allows you to pull insights you previously never had access to... insights which then drive your IST effort maximising productivity + output and efficiencies (as well as activate a more precise and targeted overall marketing strategy).

AI can also now be deployed to significantly improve your future sales forecasting by proactively (in real-time) pulling in market and economic data trends allowing you to see and anticipate changing market conditions before they arrive on the doorstep. This data allows your IST to shift tactics accordingly and ensure your brand and product stays relevant and concise in your selling proposition.

## KEY TAKE-OUT

Technology should be a key part of your IST strategy but serves no or very little purpose without the commercial context it brings and how it optimises performance of your IST which ultimately is the only thing you are judged on. Ensure all technology platforms are aligned and moving in the same direction - To accelerate your sales growth.

# KPI'S - HOW DO YOU KNOW WHAT OPTIMISED LOOKS LIKE?

It has to be the single biggest question every IST leader asks:  
How do I know that what I am delivering is optimised?

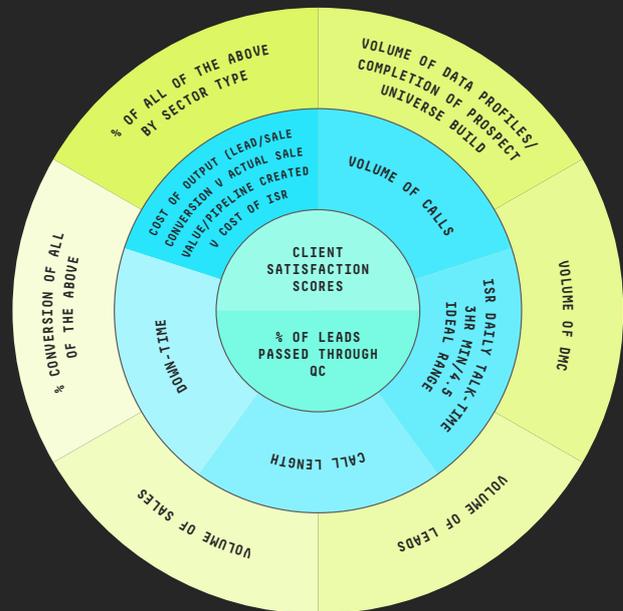
Optimised performance levels may by the way differ to the levels required to hit the commercial targets. Your commercial targets maybe set out of kilter with the size of your prospect universe. That could be a good thing (if your hitting targets every week with relative ease) and a bad thing (if the targets are simply too high and never being hit.)





We believe this is the importance of this guide... the ability to bind all these elements together in parallel is the route to optimising your IST. The rate at which you do ALL of them will ultimately bring you to the point of optimised realisation on your overall output and success as an IST. To kick start all these steps in unison (against a realistic timeline and milestones) is what will drive your IST growth.

It's also critical that your data analysts and 'tech stack platforms' provide you with a clear and concise dashboard that is easy to understand and which also is visible for all of your IST to see (Plasma screens or if working remotely accessed via collaboration tools such as Microsoft teams etc).



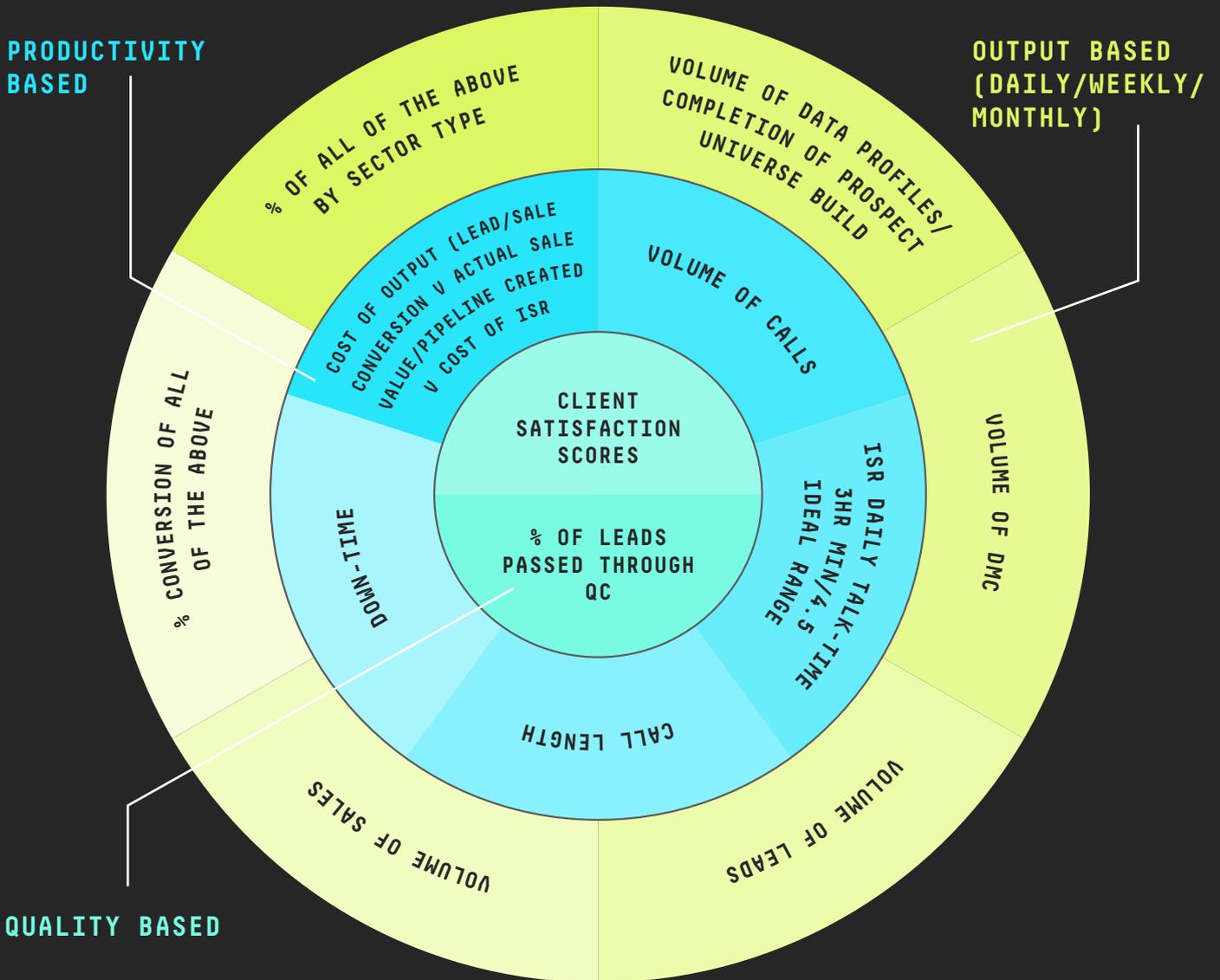
Core KPI's we all look at with regards to IST are shown in the **IST KPI Success Wheel**. Take a closer look overleaf...

## KEY TAKE-OUT

Striving for excellence should be in your DNA as an IST leader, to achieve excellence you need to understand first what optimised performance looks like (driven by all factors within this guide) and then how to sustain it.

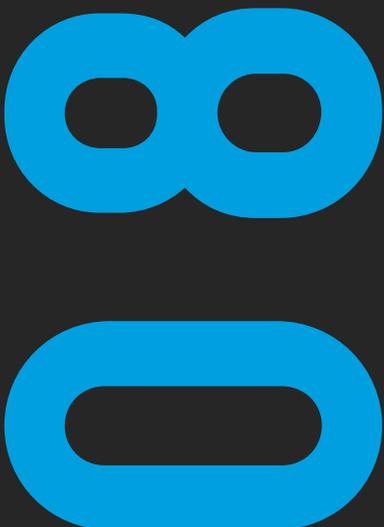
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## THE IST KPI SUCCESS WHEEL



# QUALITY MEASUREMENT

Central to the continuous improvement of your IST delivery and capability is your focus on quality measurement and ensuring your overall IST output is aligned to the [brand and customer experience](#) you strive for.





Having a quality measurement strategy in place allows you to have absolute confidence that you have the right quality control processes to consistently maintain and improve your customer experience.

Strategically you first need to have a sound understanding of what success looks like i.e. How do you want your prospect/customer experience to come across? What are the parameters around what a lead is? How do you ensure that any direct sales have followed the proper due-diligence involved to avoid any customer fall-out in the cooling off period or even at a later subsequent point in the future? [You need to create a quality standard for all parts of your IST output.](#)

Your quality measurement strategy should also include you having the right call recording and call monitoring technology in place (linked to your Tech Stack). You also then need to have a dedicated resource aligned to quality measurement and their main day to day duties should include:

- Ongoing assessment of IST output against the agreed quality standard/s
- Ensuring ALL leads have followed the necessary BANT (Budget, Authority, Need, Timeline) process.
- Ensuring the ISR has adopted the right brand experience and dialect and this should be mapped to a Quality Improvement Scorecard.
- Feeding in all feedback into your L+D strategy to ensure your ISR's are continuously trained and improved.

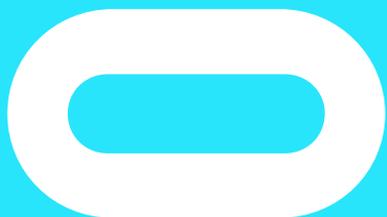
## KEY TAKE-OUT

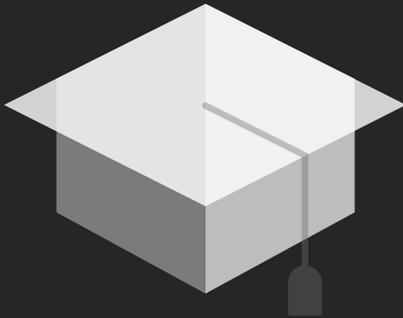
In 2021 and increasingly pressurised economic times, you cannot afford for bad customer experiences. The quality measurement function of your business ensures your IST is constantly audited in real-time - continuously improving your customer experience and maximising efficiency gains across your operation.

# LEARNING AND DEVELOPMENT (L+D)

Your ISR's naturally are your most important asset in your IST. Very often corners are cut in either their onboarding or their ongoing coaching and development and the impact on **performance and efficiencies** can be monumental.

Insufficient or ineffective learning and development strategies can also have a significant impact on your IST culture and brand presence in the local recruitment marketplace.





It's therefore critical in 2021 that you invest in implementing the most appropriate and effective L+D strategies. For many that could start with hiring a L+D manager and working as a senior IST leadership team to assist them in developing a robust L+D strategy. A strategy that puts effective training as the core focus, but which also strives to align with the quality measurement team and naturally the commercial objectives of the overall IST.

The training mix should be a mix of 121 coaching and team based 'classroom' training and be driven almost solely by robust 'science' obtained from clear and concise AI powered performance reports. All ISR's should have a thorough L+D plan laid out with regular milestone and review touchpoints. This plan should feed directly into any remuneration/promotion plans for individuals.

The L+D department should be allocated an appropriate budget to use on its training strategy and not be afraid to bring in outside training (to deliver both classroom training or self-train eLearning modules) to fill gaps in individual training requirements.

Finally, in 2021 IST's should look to fully accredit their L+D practices and strategy and develop their own credible Sales Academies. Not only does this make your people understand your taking development seriously it also acts as a great selling tool and pull factor to both clients and future ISR's. A fully accredited sales academy allows your ISR's to develop accredited sales skills that are fully transferable into future roles internally and externally... providing you with a very credible solution to attrition and enhancing your credibility as an employer in the marketplace.

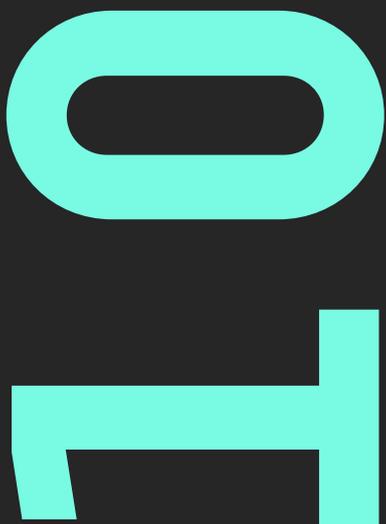
## KEY TAKE-OUT

L+D is mission critical to providing both a best in class ISR experience and in optimising productivity and performance. Ensure your IST is constantly striving in the L+D space and bringing in innovative and credible development resources + programmes.

# CULTURE + INSPIRATIONAL INCENTIVISATION

Finally, and by no means last... **the culture of IST!**

Its often a very fine line to walk... trying to instil the right **sales** and **commercially driven** culture into an organisation that may itself have very different cultural values.



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The IST maybe located within the same department or floor as marketing, product or even financial teams. So how do you achieve the right culture for your IST to thrive without de-stabilising the culture of the entire organisation?

Firstly, in all my experience, it would be wrong to assume that ISR's are not commercially and financially driven. They are, and they need to be. How else can you truly motivate a team of people to passionately sell your products. Commission and OTE is in the DNA of both sales and IST. How you set targets and ultimately reward commission are perhaps the bigger talking points.

Commission and incentivisation can and maybe should take numerous forms to ensure that you are sufficiently motivating everyone in the ISR in the right way. Individual targets and commission structures are important but not as important as the business hitting its collective target. Reward therefore needs to be based around both individual and team objectives.

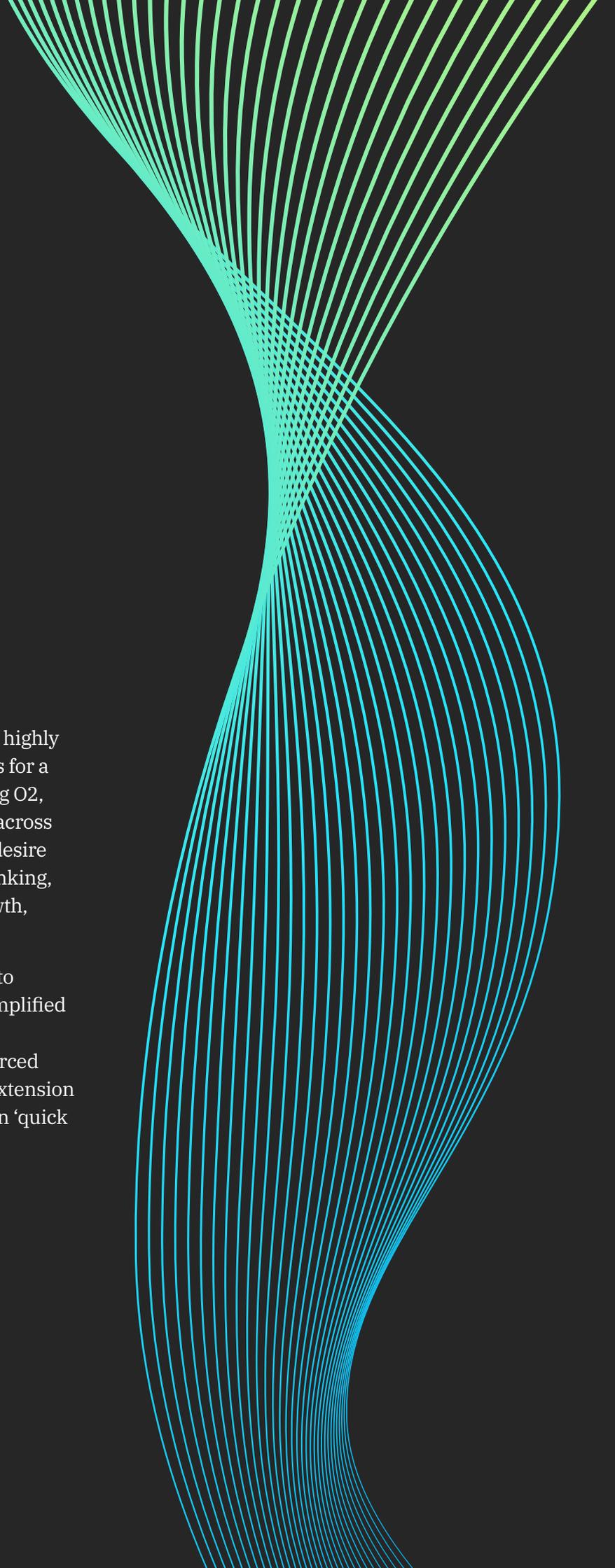
The team objective should provide sufficient inspiration and innovation away from individual commissions. Maybe it involves team away days/nights out or annual/bi-annual sales trips. Not only do these initiatives offer great reward to the team hitting target but also fuel 'togetherness' which in turn will have huge positive impacts on your performance as an IST.

Learning and development is also a key component to creating the right balanced IST culture. L+D creates credibility and a desire for ISR's to better themselves and continually learn. To this within a credible framework within your organisation will in turn positively influence your overall IST culture.

Culture needs to be a combination of commercial appetite and the desire to learn. In achieving the right balance then you will not only get the best out of your ISR's and attract talent into the business but also ensure that the IST's reputation in the rest of the organisation is professional and credible.

## KEY TAKE-OUT

**Culture influences individual behaviour which in turn influences performance and productivity of the entire IST. Do not assume you have the perfect IST culture. You need to test it, evaluate it, and ensure you have ongoing measurements in place to monitor its impact on performance and employee attrition and experience. It is your job to inspire and lead your IST to ongoing success!**



## A BIT ABOUT US:

Ampli have over 40 years' experience operating highly successful outsourced Inside Sales programmes for a variety of b2b blue-chip organisations (including O2, Npower, e-on, Briggs Equipment, Sage and EE) across many vertical sectors. It is this experience and desire for b2b organisations to access 21st century thinking, science and delivery to stimulate b2b sales growth, that has led to the creation of Ampli.

Ampli exists solely to enable b2b organisations to optimise their Inside Sales teams and deliver amplified sales growth. Through its 21st century blend of commercially focussed consultancy and outsourced (bridging) services Ampli quickly becomes an extension of your IST and operates on a strategically driven 'quick win' mindset to deliver rapid sales growth.



**LETS TALK**

Call us on [0113 8115055](tel:01138115055)

Email [hello@ampli.co.uk](mailto:hello@ampli.co.uk)

