ConnectWise®

Scale Your Business Profitability

ConnectWise eBook Series

Managing a Virtual Sales Team

Adapting to New Challenges in the Era of Remote Work

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Introduction: Getting Real About Remote Work

In the wake of COVID-19, the workplace has undergone a massive transformation—one that has completely redefined how we work. It's clear now that remote jobs are here to stay. Analysts predict that by the end of 2021, nearly **30% of the workforce will spend at least part of the week working from home**.

In fact, nearly 75% of companies already intend to move some of their staff to fully-remote positions.

As quarantine begins to lift, many companies are preparing for the future: whether they're beginning to return to the office, choosing to remain remote, or allowing employees a hybrid lifestyle. But just because more people will be working from home doesn't mean that all companies are optimized for it. Sales-centric organizations, in particular, are now presented with their own unique set of challenges. If a sales representative can hit their goals regardless of their location, there's no reason they have to be in the office 40 hours a week. The de-centralization of the office may cause disruptions that hinder productivity and efficiency, but with the proper safeguards, you can give your team flexibility and freedom while still meeting quotas—without ever sacrificing margins.

Understanding potential barriers to sales success—and adapting your processes and procedures accordingly—can help you stay ahead in the new normal. In this eBook, we'll provide tips and tricks to help you manage your virtual sales team to sustain momentum—and exceed company goals.

Chapter 1: Use Systems to Keep Your Team on Track

When your sales team is remote, synchronicity is key: all of your reps must be aligned and work together to ensure no detail goes unnoticed. Unfortunately, going remote can cause some of the transparency into client and prospect communication to get lost. This is where your systems become increasingly important. If your team is using disparate platforms, such as spreadsheets or documents, there's decreased visibility into the sales pipeline and the potential for inaccurate data or delays in customer follow-ups.

Instead, make sure reps are fully utilizing the customer relationship management (CRM) system to log information about prospects and clients. This gives your internal team the peace of mind that every customer is taken care of and prevents anything from falling through the cracks.

Here are some of the benefits of properly leveraging your CRM:

Consistency

If your right hand isn't talking to the left, you're more apt to drop the ball. When reps use disparate systems, they may duplicate data or reference inaccurate notes. What's more, admin tasks like data entry take time—and can cost you over 25% of your revenue.

Using the CRM maintains consistency. No matter who's handling a sale, everyone on the team can view the status or the date of the last follow-up in real-time. Use CRM integrations to pull in data directly to save valuable time and avoid errors.

Organization

Storing data in the centralized hub that is the CRM also ensures you can view the sales pipeline. From a management perspective, visibility into the pipeline means you can nip problems in the bud and remotely manage your team. Reps can use the CRM to set reminders to follow up with prospects at regular intervals, flag customer statuses to management, and stay on top of to-dos.

Performance

Sales performance is just as important when reps aren't in the office. To ensure your team is delivering, lean into your systems to gain an accurate picture of their activity. Are your reps continuing to make calls to prospects, even if sales are booming? How long is it taking to close a sale? Tracking performance helps you stay in the know and puts you in a position to empower reps who continue to exceed their goals.

BrightGauge
a ConnectWise solution

BrightGauge®, a ConnectWise solution, offers a BrightGauge + ConnectWise Sell® integration that enables reps to manage quotes nimbly and professionally—and never miss a beat.

Chapter 2: Stick to the Process

In times of economic downturn, reps may be tempted to adopt a whatever it takes mentality to close a sale. This could mean misquoting, scoping incorrectly, or even overly discounting a product to move the customer closer to their purchase. While individual and company sales goals still need to be met, allowing sales reps to go rogue in an attempt to sell could lead to reduced cash flow—or leave a bad taste in the customer's mouth.

No matter how difficult things get, you still need to deliver outstanding service, professional quotes, and consistent pricing free from errors. Standardizing processes and creating checks and balances of approval can help you do just that. One study found that **businesses with standardized processes may generate up to 28% more revenue** than businesses without.

Quote and proposal automation software, like **ConnectWise Sell**, enables you to implement new processes effortlessly:

- **Create quote and proposal templates.** A professional-looking quote can be the difference in closing (or not closing) a sale. Send out high-quality quotes and proposals every time by creating custom templates, saving reps time and making a great impression on clients.
- **Lock in client pricing.** Take the guesswork out of rates by setting pricing rules in your software. This way, reps can confidently provide an accurate price and avoid errors.

- **Set levels of approval.** Even the most detail-oriented reps can make mistakes. Running another set of eyes over deliverables can help you avoid revenue loss. **ConnectWise Sell** now includes multi-level approvals—so you can implement as many levels of control as needed. Use your software to set controls that automatically bump quotes and proposals over to management for approval before they go to the client.

Standardization provides you with managerial oversight, projects a professional appearance to clients, and empowers your team to spend more time selling—rather than spending time bogged down with paperwork.

If reps are resistant to embracing these processes, remind them that they are in place to help the team succeed and win over customers. **Learn more about automating your workflow**.

Chapter 3: Level Up the Sales Experience

Relationships are at the core of sales—whether it's using teamwork to close a deal or cultivating customer trust one-on-one. With remote work, things are undeniably going to be different, but there are still opportunities to provide personal service. Your team's focus should be on providing the best experience possible and making it easy to do business with you. Work to eliminate friction points such as discrepancies between the quote and invoice or inconvenient payment methods.

With **42% of business purchases now being made digitally**, B2B customers are putting their stock in the quality of virtual interactions. And increasingly, they are expecting B2C-like self-service tools that simplify and speed up the sales process. How you acquire and interact with customers will become even more crucial in the coming months, so don't let reps forget to deliver an outstanding customer experience.

Opportunities to impress your customers are right at sales reps' fingertips.

- **Personalize communication**
  Your reps can't meet clients face-to-face, but they can attach a personalized video to a quote or ask how a client's family is doing next time they exchange emails. Little touches like these can go a long way when business is done remotely.
- **Make it easy to say 'yes'**
  Keep things simple for your customers—and be accommodating of the fact that they may be working from home, too. If you rely on hard copies of documents, customers may have to deal with headaches such as scanning and faxing, converting document types, and more. Use your quote and proposal automation software to deliver documents digitally and enable e-signatures to save customers time and get your payments quicker. The more painless you can make it, the more likely it is that you'll close the sale.
- **Add convenience—wherever possible**
  Your customers are busy. Chances are they need your services now. Consider adding an online payment tool so customers can complete their order in a handful of seconds. Again, the more steps you can save, the happier customers will be.
- **Provide on-demand service**
  Repeat customers typically need the same products over time. Create a quote request feature—in the form of a standing webpage—so they can easily notify reps when they need to re-purchase.

A solid customer experience and reliable service are key differentiators that will keep clients coming back to you again and again. **Learn more about making a good impression on clients**.

Conclusion: Flourishing in the New Normal

Adapting sales to the remote workforce has had its unique challenges—it's clear that companies must keep pace with the evolving landscape or get left behind. Your sales team may be working in a different capacity than before, but they can still achieve superb results with the right support and structure.

> Working to restore your sales to pre-pandemic levels? Check out our webinar, **Selling Into the Storm—New Business Generation in a Downturn**, with Paul Dippell, CEO of Service Leadership, Inc.

A digital office requires thoughtful tactics. Utilize the technology at your fingertips to empower sales reps and enrich the customer experience. Your products and services speak for themselves, but it's how you sell them that will enable your company to flourish. With the right management strategies, you can help keep your team's productivity high and aimed straight at company goals.

Want to see this eBook's strategies in action?

Watch the ConnectWise Sell demo to learn more >>