

SALES

OPERATIONS GUIDE



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INTRODUCTION: TIME TO THROW OUT THOSE PAPER MAPS

The task of managing and operating a B2B sales team has fundamentally changed in a shockingly short time span. **Virtual sales models are here to stay**, as “almost 90% of sales have moved to a (virtual) sales model ... and more than half believe this is equally or more effective than sales models used before COVID-19,” according to McKinsey. As the millennial generation continues to take over the bulk of the salesforce, companies are losing valuable tribal knowledge. Now they must adapt quickly in order to set younger reps up to succeed, which necessarily means meeting their digital expectations.

At the same time, the complexity of the sales role and the speed with which reps need to be able to deliver the right offer are only increasing. Executing against multiple, sometimes competing, corporate strategies was an uphill battle for even your most seasoned sales reps before a pandemic changed everything. In the current landscape, it’s incumbent upon sales operations managers to eliminate the noise for sales reps and close the loop on strategic campaigns.

To the degree that it was ever possible to pull this off with spreadsheets and emails, the game has changed. The modern sales ops team needs to get scientific and adopt a digital playbook. Much like the world now runs on GPS, you can deploy targeted, precise actions for sales reps and quickly re-route the courses as needed without risking focus loss with sales.

In this 2021 sales ops strategy guide, we’ll share why the strategy-to-execution gap is doggedly persistent in B2B, how the pandemic has created a roadblock for day-to-day sales effectiveness, what winning teams do differently, and six winning sales ops strategies that result in direct sales action.



The Changing Role of Sales

Explore how field sales is blending with inside sales, the disadvantages and new opportunities available in a digitized sales environment, and why many aspects of the new normal are here to stay, even beyond the Coronavirus pandemic.



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2021 Predictions on the Future
of B2B Pricing and Sales

CAUTION AHEAD: THE STRATEGY-TO-EXECUTION GAP

The strategy-to-execution gap is a well-worn concept in B2B, yet truly achieving that state can feel akin to finding a path to the lost city of gold.

If the company strategy is to increase profitability and revenue, how should that impact pricing and sales decisions across various customer types, multiple channels, agreements, regions, products, and much more? How should those actions change to meet P&L goals as costs change, demand spikes or plummets, volume growth stagnates, or new competitors sneak in? Ideally, guidance reflecting corporate strategy would be immediately disseminated across channels, and tailored to all the various, and sometimes competing, market realities that can be present at once across a business.

Despite best efforts, we observe some key dynamics that only widen the gap:

- At any point in time there are many corporate strategies you're trying to execute: For example, grow profit, but not at the expense of sales, win the deal but not at the expense of margin, push through a price increase, gain more wallet share, sell a preferred brand, sell through aging inventory.
- While well intentioned, **these initiatives may be in competition with each other** from time to time, competing for mindshare and **often lacking enough specificity to guide customer interactions and enough direction to be actionable on the front line.**
- That breakdown impacts marketing, sales, eCommerce, quoting processes, price setting processes, and ultimately the top- and bottom-line.
- **Flavor of the month initiatives fail** to close the gap because some reps know there won't be any follow up and **will ignore it** and wait for it to pass.
- **A majority of your reps are trying to follow the guidance**, yet are overwhelmed with overly-broad, hard-to-prioritize information while broadly being asked to do more with less time.
- **Compounding matters, there is less customer loyalty than there once was.** It's not uncommon for reps to operate in an order-taking mindset, and understandably so; it's hard to focus and add value to buyers if they are managing 50+ accounts.

Sales reps need guidance, and for it to be effective it *must be* driven by data and pragmatic AI.

"Customer interactions will continue to be increasingly digital – forcing people, processes and technology to continue to adapt," said Greg Peters in the opening keynote of Zilliant MindShare 2020. "People alone cannot scale in this world and organizations must learn and embrace AI technologies. While these changes are amplified by COVID-19, from a sales perspective they are largely permanent."

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THE PANDEMIC CREATED A ROADBLOCK

This breakdown between the strategic initiatives created by a wide range of departments (marketing, finance, pricing, etc.) and meaningful sales action has only been exacerbated by a global pandemic. The strategy-execution gap widened as complicating trends were accelerated in 2020.

We've already discussed how the inability to meet face-to-face and walk the shop floor with customers sped up the shift to virtual sales. We've also seen the rise of increased customer expectations. Whereas a buyer may have compartmentalized their own personal shopping on Amazon and the more analog experience he or she gets from vendors, that wall is rapidly coming down. B2B buyers now expect omnichannel self-service, price transparency and personalization from their vendors. While this was already in motion prior to 2020, the new buying paradigm has been established after spending the better part of a year interacting with vendor sales teams over video calls.

What this means for B2B manufacturers and distributors is a tectonic shift in the selling process; from initial price setting to campaign creation to quoting and negotiations. If companies fail to meet buyers where they are, molding their approach to match buyer behavior, they will be left behind even once the pandemic subsides.

A reactive sales process (31%) was the leading sales challenge identified by poll respondents during Zilliant MindShare 2020, our annual customer conference. This is not an indictment of a sales team; it means the data and customer intel necessary for a proactive sales strategy do not reach the sellers in easily executable ways in many B2B companies.

So what do top B2B sales teams do differently that keep them ahead of the curve? Read on as we tackle that question in the following section.



COVID-19 Has Capsized
Business As Usual



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Pro a Pro Grows Wallet Share With
Actionable Customer Insights

WHAT WINNING TEAMS DO DIFFERENTLY: FIND THE FASTEST, MOST EFFICIENT ROUTE TO SUCCESS

The imperative is clear: Companies need to rethink how they equip sales. From acquisition to retention to maturity, it's impossible to drive action across the customer lifecycle with traditional methods like spreadsheets. This is what winning sales and sales ops teams do differently:

- Adopt leading prescriptive sales analytics and campaign management tools to surface and disseminate actionable sales intelligence as quickly as possible.
- Wrap a sales process around specific, granular actions for sales.
- Equip front-line sales managers to coach to the guidance, which is only possible if there's a closed-loop feedback to measure sales adoption and incremental revenue.
- Ensure a consistent experience between online and direct channels. Offline interactions must mimic the tele-sales experience and eCommerce experience.

By doing so, customers feel as though they are dealing with a cohesive company that is giving them personalized pricing that makes sense in the context of their relationship with you and the product recommendations most likely to meet their needs.

"In the past, we tried with a homemade approach to sales, but it didn't work because it was based on gut feel rather than data; it was based on what we thought would be the right thing," said Pro a Pro Chief Executive Officer Guillaume Deruyter. "It's helped us be more effective in terms of sales by leading with strategy."

"(Sales IQ) allows our selling organization to approach our buyers with more valuable information in the limited time that we have in Zoom calls," said the director of sales business operations at a global distribution company. "Now that buyers are conditioning themselves to this reality, we're taking the opportunity to have a more value-based conversation and setting a new bar on how to drive these conversations forward."

In the next section, we'll share six winning sales ops strategies that address a current challenge by using AI and smarter software to turn strategy into sales action.

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SIX WINNING STRATEGIES FOR SALES OPS IN 2021

ONE: WIN BACK CATEGORIES LOST DURING THE PANDEMIC

The Challenge

Sales are down post-pandemic but pinpointing where is difficult. Particularly in B2B, where massive customer and product counts create an insurmountable challenge for basic spreadsheets. Surfacing that analysis in an intuitive format for sales is difficult. Sales teams have large books of business, are grappling with the rapid shift away from in-person sales induced by the pandemic, and have minimal time to analyze information.

The Sales Ops Strategy

STEP 1: Utilize Sales IQ™ to run a peak-year comparison analysis, for example, comparing 2019 to 2020 by product category.

STEP 2: Utilize Campaign Manager™ to narrow the focus of the results. Scope the results as needed (for example only returning customer-product category combinations that experienced at least a 30% year-over-year drop) to avoid sales rep overwhelm.

STEP 3: Run the calculations and publish the results via an intuitive sales interface such as Sales Planner™.

50%

of B2B buyers were holding off on purchases because of the pandemic.¹



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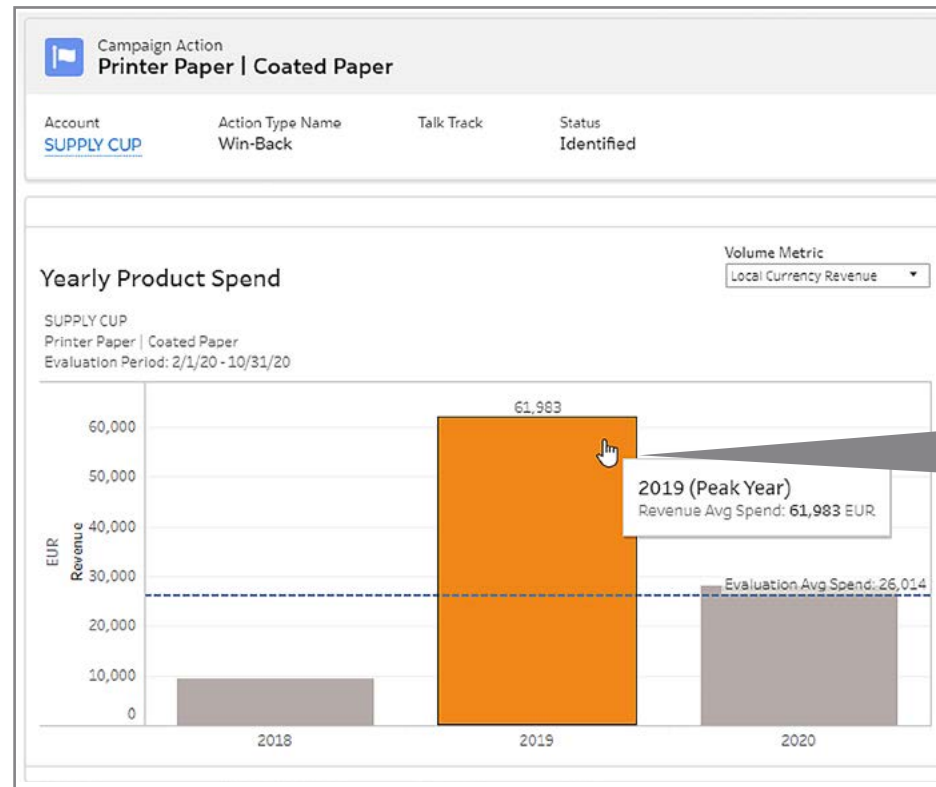
SIX WINNING STRATEGIES FOR SALES OPS IN 2021

ONE: WIN BACK CATEGORIES LOST DURING THE PANDEMIC

continued

The Sales Action

- ✓ Sales reps can see precisely where their customers' business needs to be won back.
- ✓ With a simple interface, they see only the most important actions to take.
- ✓ They can quickly drill in to see a visual analysis of the data to understand specifically where spend has declined, in what category, during what time frame, and the value of the decline.
- ✓ In a few seconds, they have all the information they need to go back and win business.



Visual analytics provide an intuitive rationale to sales reps.

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Private label
manufacturing is up

45%

year over year.

SIX WINNING STRATEGIES FOR SALES OPS IN 2021

TWO: PARTNER WITH MARKETING TO GROW PRIVATE LABEL SALES

The Challenge

According to Thomasnet.com¹, private label manufacturing sourcing activity has recently seen steady growth — up 45% year over year. And for good reason, private label brands can deliver higher profit margins and lower operating costs, while building brand loyalty. Yet, in complex B2B markets, it can be difficult to identify all the opportunities for sales reps to recommend private label when a customer is seeking a comparative product.

The Sales Ops Strategy

STEP 1: This route puts marketing in the co-pilot seat with sales ops to drive sales action on this critical campaign type.

STEP 2: It starts with marketing running an analysis that results in a one-to-one mapping of comparative branded products to the private label SKUs.

STEP 3: Sales ops then utilizes Campaign Manager to upload the product mapping and call on the Sales IQ engine to identify all customers that are currently buying the branded products.

STEP 4: Once identified, sales ops can use Campaign Manager to focus the campaign, for example, by only surfacing actions for customers that have purchased the products in the past six months, have purchased the products a minimum of five times, and at a volume of at least 2,000 units.

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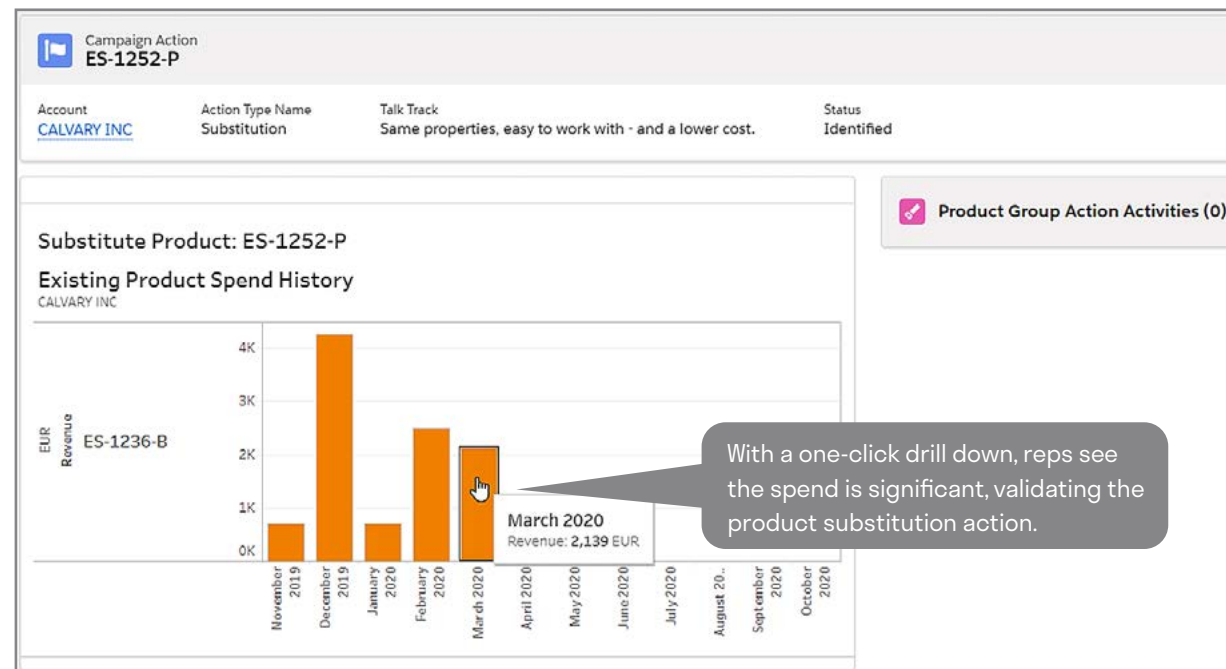
SIX WINNING STRATEGIES FOR SALES OPS IN 2021

TWO: PARTNER WITH MARKETING TO GROW PRIVATE LABEL SALES

continued

The Sales Action

- ✓ Sales reps see a simple substitution action when logging into their CRM, prompting them when there is an opportunity to convert sales to a private label.
- ✓ With a one-click drill down, it's easy for reps to understand the product spend history for the product substitution recommendation.
- ✓ Even better, with the scoping ability created by Campaign Manager, sales reps don't get overwhelmed by all possible product substitution opportunities, just those most likely to make the greatest impact.



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SIX WINNING STRATEGIES FOR SALES OPS IN 2021

THREE: TARGET SALES GROWTH IN A SPECIFIC REGION TO SPEED PAST COMPETITORS

The Challenge

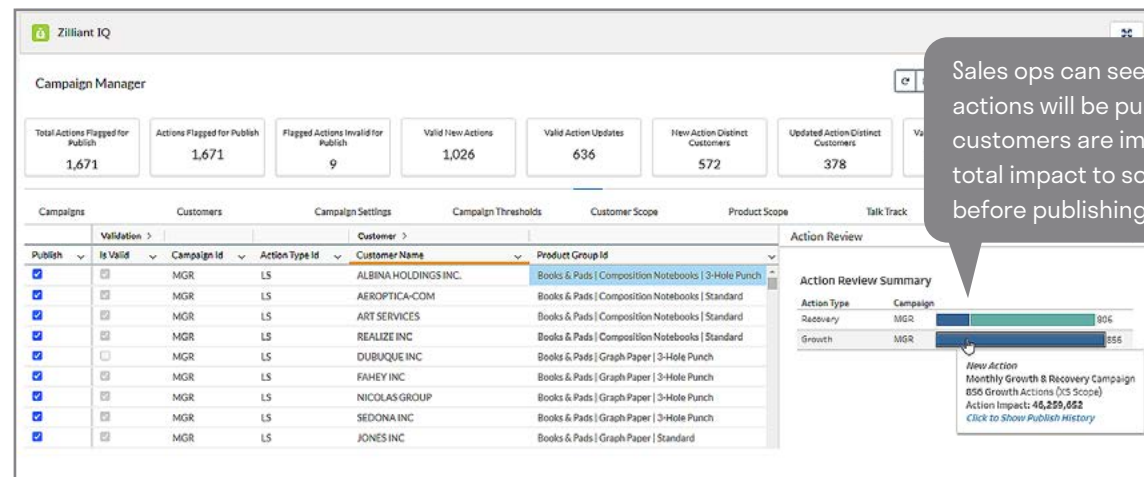
At times, sales ops strategy calls for a surgical precision. For example, the data may show competition is active within one product category, in one region. It's time to get aggressive and give sales precise, immediate direction.

The Sales Ops Strategy

STEP 1: Deploying a targeted growth campaign is straightforward when Campaign Manager is paired with Sales IQ. Sales IQ's advanced data science creates ideal purchase pattern profiles based on the observed behavior of your best customers, and matches each customer to the closest profile to identify growth actions.

STEP 2: Ensure sales reps stay focused on what matters by filtering the actions and prioritizing campaigns. For example, how small should the potential spend gap be to trigger a sales action?

STEP 3: With Campaign Manager, it's simple for the sales ops manager to see how many campaigns and number of sales actions are being sent, and to prioritize or scope further if needed.



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SIX WINNING STRATEGIES FOR SALES OPS IN 2021

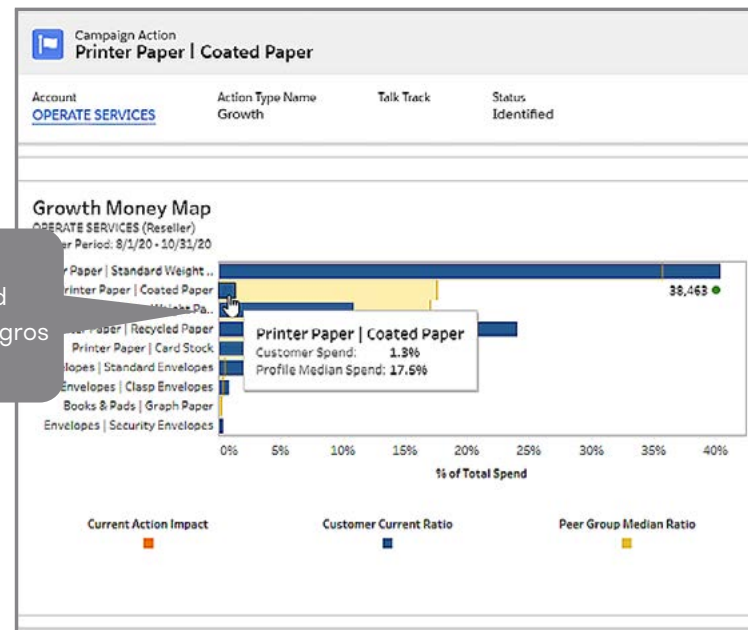
THREE: TARGET SALES GROWTH IN A SPECIFIC REGION TO SPEED PAST COMPETITORS

continued

The Sales Action

- ✓ From the sales rep desk, the analytics behind the actions make it easy to see and understand the specific product category where the opportunity exists.
- ✓ Sales reps only see the immediately re-prioritized list for actions to take today.
- ✓ With a one-click drill-down, the rep can see a detailed money map for this customers' product category spend and where specific gaps exist.

Similar customers usually buy Standard Weight Paper, but Legros doesn't buy any.



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SIX WINNING STRATEGIES FOR SALES OPS IN 2021

FOUR: POINT SALES REPS TO OPEN QUOTES TO GO WIN THAT BUSINESS

The Challenge

Sales ops are often the first to spot significant gaps and opportunities for sellers. It's all too common for great opportunities to be sidelined, whether that's due to sales team focus, data processing or CRM maintenance issues, or more often than not, simply having a mechanism to quickly deploy actionable guidance to sales. Campaign Manager can bring your offline analysis into immediate action for sales teams in a few simple steps.

The Sales Ops Strategy

STEP 1: You notice that a significant amount of quotes for a certain product category in the eCommerce channel didn't convert to an order.

STEP 2: Simply pull that .CSV analysis into Campaign Manager, create your new custom action type, do a quick column mapping, and a quick validation via simple analysis and you're ready to deploy!



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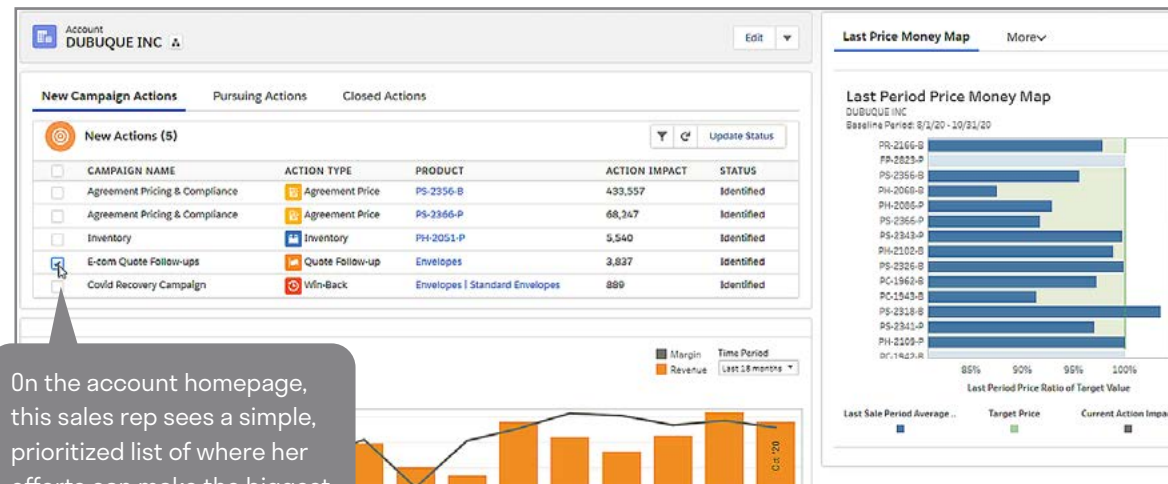
SIX WINNING STRATEGIES FOR SALES OPS IN 2021

FOUR: POINT SALES REPS TO OPEN QUOTES TO GO WIN THAT BUSINESS

continued

The Sales Action

- ✓ Again, reps see the simple action to take with customers.
- ✓ Additionally, sales ops can add the easily-configurable talk tracks to provide specific instruction to the sellers, for example “Follow-Up on Invoice XYZ”



On the account homepage, this sales rep sees a simple, prioritized list of where her efforts can make the biggest impact today.



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SIX WINNING STRATEGIES FOR SALES OPS IN 2021

FIVE: WORK WITH THE PRICING TEAM TO BRING LOW-MARGIN PRICING UP TO TARGET

The Challenge

The complex and fast-moving nature of B2B means that it's not uncommon for pricing to quickly grow out of step with the market, resulting in margin erosion. To ensure pricing is up-to-date, and sales reps know precisely where they need to update prices with customers requires a scalable means to 1) set and update market-aligned pricing 2) easily signal to sales reps when it's time for a pricing update.

The Sales Ops Strategy

STEP 1: Here, pricing and sales ops teams can work in tandem to empower sales to hold the line on margin, even in a complex business where sales teams are strapped for time.

STEP 2: Pricing team spots a low-margin product category and would like sales reps to focus on bringing those prices closer to the target price the next time the customer requests a quote or places an order.

STEP 3: Here, it's easy for the teams to collaborate, bring in complementary data that ties desired pricing actions to a SKU, run a campaign and scope it as needed. For example, only surfacing price actions for customers that have purchased the item at least three times in the past 12 months who paid a margin of 35% or lower.

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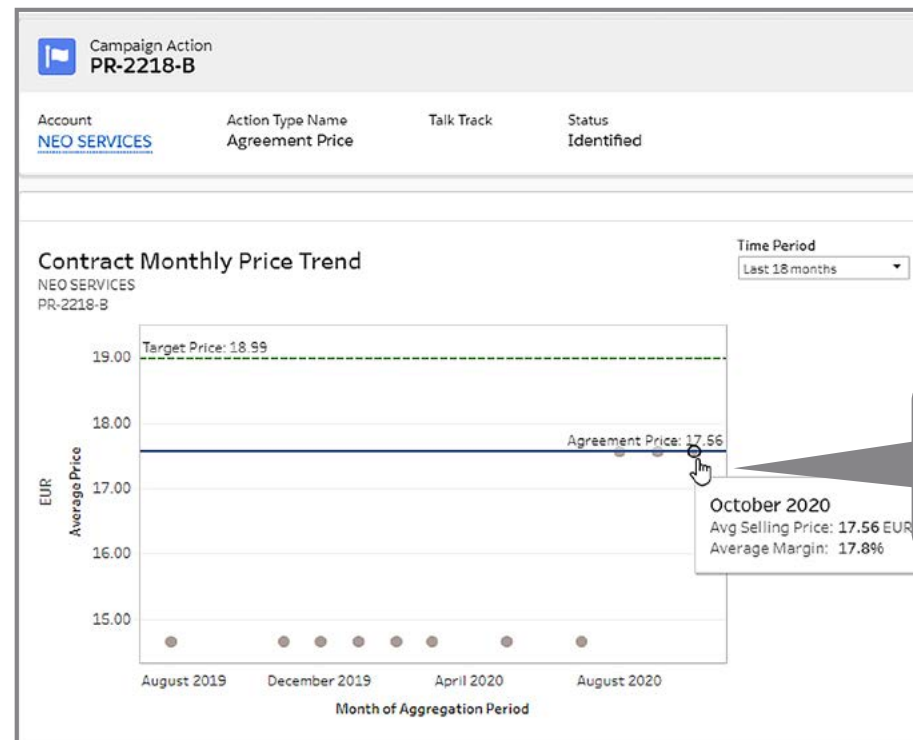
SIX WINNING STRATEGIES FOR SALES OPS IN 2021

FIVE: WORK WITH THE PRICING TEAM TO BRING LOW-MARGIN PRICING UP TO TARGET

continued

The Sales Action

- ✓ Embedded visual analytics make it easy for sales reps see the historical price reference.
- ✓ Sales has the action and the rationale to update pricing with their customers during their next interaction.



Visual analytics make it easy to see why this customers' pricing needs to be brought up to target.



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SIX WINNING STRATEGIES FOR SALES OPS IN 2021

SIX: CREATE WHITESPACE SELLING GUIDANCE FOR NEW ACCOUNTS

The Challenge

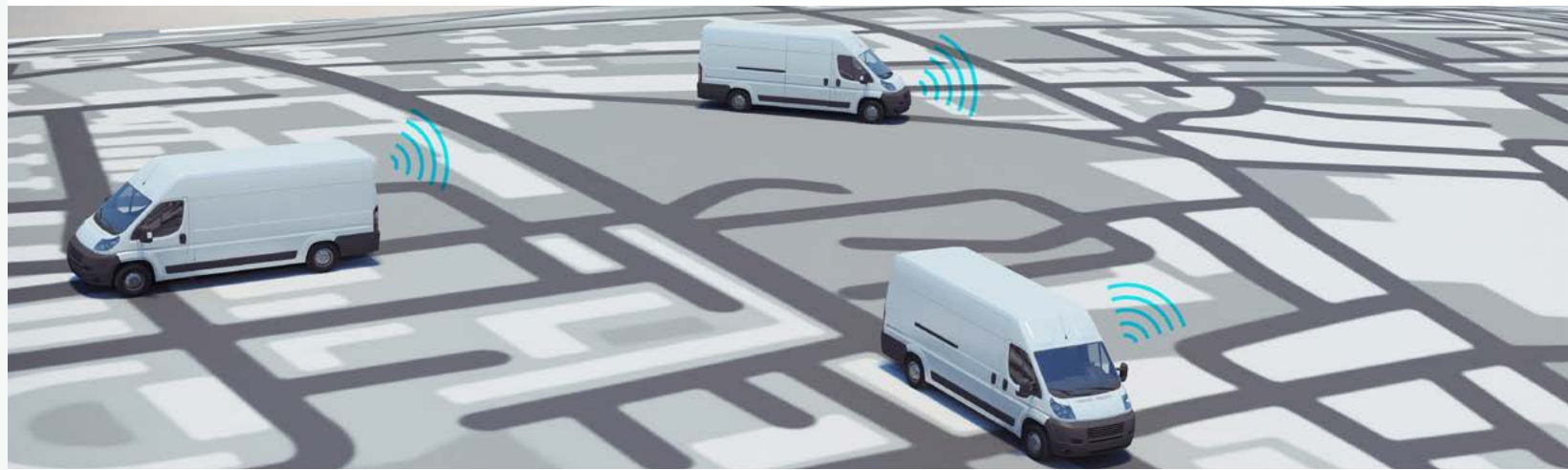
Knowing which products to pitch to a new account is a significant challenge for B2B sales reps, given the complexity and analysis paralysis reps must contend with. This problem gets more acute as the speed of acquisition of new customers, companies and product lines increases in B2B. When companies merge or are acquired, you now have two sales teams that are experts in one domain, but not necessarily the new entity. How can you help sales reps get up to speed and sell as effectively as possible across the entire book of business?

The Sales Ops Strategy

STEP 1: Utilize Sales IQ to generate many, discrete ideal customer purchase profiles and map all accounts to the closest profile to reveal spend gaps at the product subcategory level, and apply them to the new customer profiles.

STEP 2: Run the whitespace action in Campaign Manager, and uncover which new accounts match to which ideal profiles, matching based on highest level of similarity in the profile.

STEP 3: Scope and refine the results as needed, for example scoping the results down to categories with 100% spend gaps, to highlight the top categories for this new customer.



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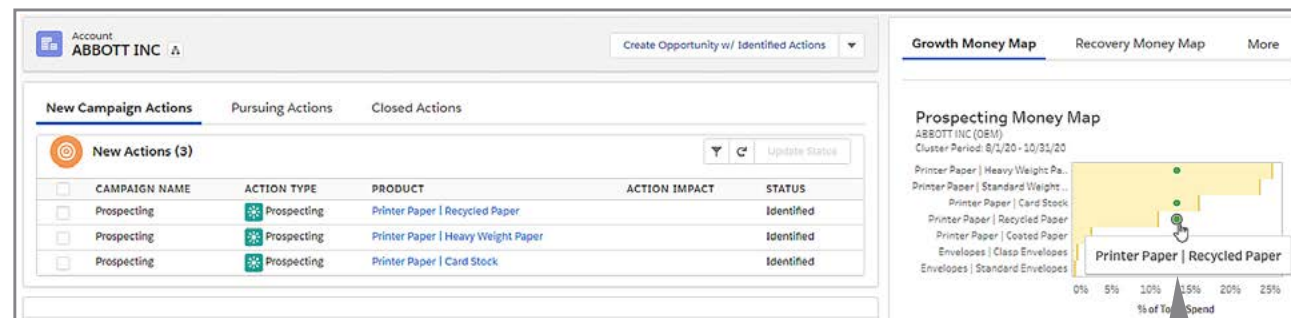
SIX WINNING STRATEGIES FOR SALES OPS IN 2021

SIX: CREATE WHITESPACE SELLING GUIDANCE FOR NEW ACCOUNTS

continued

The Sales Action

- ✓ Sales sees precisely which products are most likely to result in a win for net-new accounts.
- ✓ With embedded visual analytics, it's simple to demonstrate what to sell and what percent of total spend this category might be attributed to the total customer spend.



Sales reps see a prioritized list of actions, telling them precisely which products this new customer is likely to purchase.

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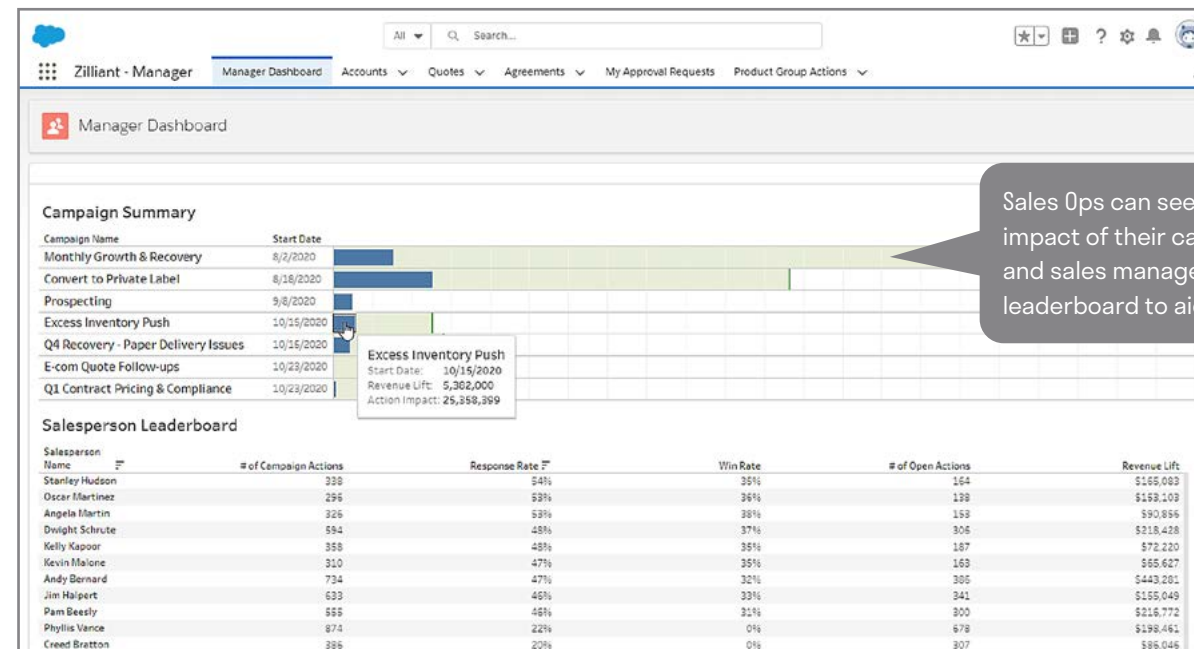
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SIX: CREATE WHITESPACE SELLING GUIDANCE FOR NEW ACCOUNTS

continued

Close the Loop & Match Action to Revenue

As we learned, winning sales and sales ops teams wrap an entire sales process around the actions generated by Sales IQ and Campaign Manager. This results in a remarkably high adoption rate; most sales teams have a more than 98% adoption rate of the actions. With the closed-loop feature, sales managers and sales ops can see how well sales reps are following up on each campaign. Even better, actions are tied to order data, then run rates are quantified, so sales ops can see easily see the financial impact of their efforts, matching action to revenue.



Sales Ops can see the financial impact of their campaigns and sales managers see a leaderboard to aid in coaching.

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CONCLUSION

We hope this Sales Operations Guide: Six Strategies for 2021 helps you think differently about what's possible in your role in sales ops and the impact you can have on your company's success. Please reach out to us anytime, our experts in sales effectiveness are standing by to help you begin reimagining sales ops today.

See it in action with this on-demand webinar:

How to Translate Strategy Into Sales Action



Want to learn more?

Read more about why manual analysis fails to scale in B2B and why AI, data science and smarter software is the key to driving sales action.





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