How Top Performing Sales Teams Utilize a CRM

A Guidebook from M Sales Growth Advisors

www.msalesgrowth.com

TOPICS OF DISCUSSION

About M Sales Growth Advisors

Strategic Sales Growth for Small Businesses

M Sales Growth Advisors was founded by Scott Moss with a single mission: **Empower Small Businesses to Achieve Greatness**. He personally approaches each client with fresh eyes to develop unique sales strategies that leverage sales enablement technology, continuous coaching, thought leadership content, accountability to KPIs, and a defined, repeatable, and scalable sales process.

Scott has over 30+ years of direct B2B sales experience as a producer and leader. From the C-Suite to the small business owner and from the venture-funded start-up to the mature diversified enterprise, he understands the challenges each face, how to overcome them, and what success means for each client.

Some of the impressive companies he has helped include FortifID, Intelligent Technical Solutions, Republix, geoAMPS, The Vertical Collective, Gloss, UBX Cloud, JUICE, Radcomp, Web 2 Market, Brightworks Group, Geriatric Medical, Simplex-IT, BrightWire Networks, Agency Breakout, Bell Falls Search, DigitalC, TEGAM, OpinionRoute, Hustler Marketing, Master Printing, Mezu, Premier Equipment, Embrace Pet Insurance, Proformex, viperks, BI Worldwide, Point to Point, Bridgeline Digital, Easy2 Technologies, and Cardinal Health.

Why You May Need This Guide

Your sales team is CRM averse & loves spreadsheets.

Your sales team doesn’t know how to leverage your CRM .

Your CRM is not optimized for your Strategic SalesOps Playbook.

Your CRM does not provide adequate sales journey visibility.

LEADS FUNNEL MANAGEMENT

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Insight into lead flow & legitimate qualification.

- Define the stages of your Leads Funnel to include:
  - Ideal Client Lead: matches the description of your ICP
  - Marketing Qualified Lead: has positively engaged with your outreach
  - Sales Qualified Lead: determined by your Sales Executive(s) to have Budget, Authority, Need, and Timeline to take action (BANT)
- Deploy a lead scoring system based on:
  - Level of engagement with your outreach
  - BANT qualification analysis
- Create and use content-enriched nurturing cadences that are aligned with your Leads Funnel stages and Buyer's Journey phases: Awareness, Consideration, and Decision
- Create funnel stage views in the CRM for visibility into the Leads Funnel health

DEALS PIPELINE MANAGEMENT

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Insight into deal flow & legitimate forecasting.

- Define the stages of your Deals Pipeline with forecast percentages to include:
  - Deal on Deck: the SE has identified a potential deal to arise within 90 days
  - Working on Proposal: the SE has the defined scope and is preparing a proposal
  - Proposal in Review: the SE has actually *presented* the proposal to the prospect
  - Contract in Review: the SE received a verbal/written YES and contract is out
  - Won: the contract has been signed and returned by the prospect (new client)
  - Lost: the SE received a verbal/written NO from the prospect
  - Parking Lot: the deal has stalled but is expected to progress within 30 - 60 days
- Create content-enriched nurturing cadences aligned with the Deals Pipeline stages
- Create deal stage views in the CRM for visibility into the Deals Pipeline health

DOCUMENTING SALES ACTIVITIES

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The CRM as the single voice of truth.

- Tasks:
  - Every completed task requires a follow-up task such as a to-do, email, or call
- Meetings:
  - Connect external calendar platform to the CRM
  - Log meeting notes, type, outcome, and set a task for next steps
- Calls:
  - Connect external calling platform to the CRM
  - Log call notes, type, outcome, and set a task for next steps
- Emails:
  - Connect external email platform to the CRM
  - Turn on auto email tracking and logging

WORKFLOWS & AUTOMATION

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Sales team efficiencies & stop-gaps.

- Leads Funnel:
  - Funnel progression engagement/process rules by stage
  - Lead stage nurturing sequences
- Deals Pipeline:
  - Pipeline progression engagement/process rules by stage
  - Deal stage nurturing sequences
- Notifications:
  - Time in Funnel/Pipeline stage
  - SE follow-up activity status & reminders
  - Outbound/inbound engagement scoring

SALES TEAM KPIs DASHBOARD

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Sales team accountability & leadership visibility.

- Calls Made: by type and outcome
- Meetings Conducted: by type and outcome
- Tasks Assigned: by open, complete, and follow-up
- Leads Funnel Progression: by stage quantity, time, and conversion rates
- Deals Pipeline Progression: by stage quantity, time and conversion rates
- Sequence Utilization: by enrollments, engagement, and outcomes
- Sales Forecasting: by likelihood percentage, legitimacy, and outcomes
- Sales Goals Tracking: by SE, team, achievable, aspirational, and outcomes

This Guidebook was prepared by Scott Moss, Principal of M Sales Growth Advisors. To learn more about how he can help your company grow, feel free to click the button below to schedule a call.

Click to Schedule a Call