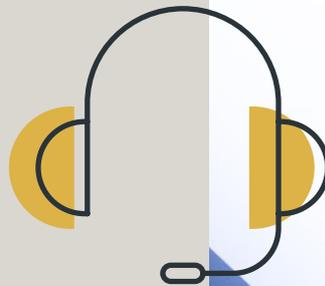


# THE B2B *Inside Sales* PLAYBOOK

A guide for leveraging Inside Sales as a strategic growth driver in B2B based on Implement's industry learnings



## Inside Sales typically helps you improve three key areas of your business ...



Increase **top-line growth**  
by up to

**26%**



Increase **lead conversion**  
**rate\*** by up to

**36%**



Reduce **cost of sales\*\***  
by up to

**35%**

### What is Inside Sales?

Inside Sales is:

- a dedicated team that sells remotely either over the phone or virtually.
- aimed at researching, qualifying and handling leads and selling directly to selected customer segments.
- driven like a sales channel with performance targets.

### What is the difference between Inside Sales and Field Sales?

Field Sales spend their time visiting customers and having face-to-face meetings, which means that they often spend a lot of time on the road. Inside Sales typically works remotely or in the office.

Inside Sales has full access to information, communication and correspondence with customers, CRM data and research platforms throughout their day.

Strengthening collaboration between the two functions will leverage capabilities in both sales interactions, resulting in lower cost of sales, increased sales efficiency and more quality touchpoints with customers.

### Why is Inside Sales key to success?

Inside Sales is a vital part of the customer experience, ensuring more frequent quality touch-points with your accounts to help accelerate lead conversion and sales. The function also conducts crucial research on your accounts, providing Field Sales with essential knowledge and insights before key sales meetings.

\*Results based on Implement's learnings from Inside Sales projects within B2B conducted over the last three years.

\*\*McKinsey & Company, 2009. Cutting sales costs, not revenues. McKinsey Quarterly.

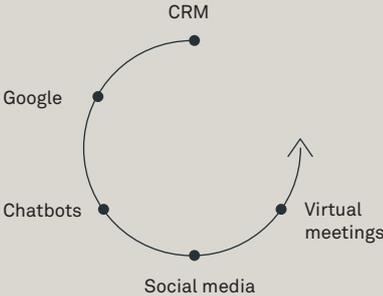
Available: <https://www.mckinsey.com/business-functions/marketing-and-sales/our-insights/cutting-sales-costs-not-revenues>

# There are three trends making Inside Sales more relevant than ever

With the rise of digitalisation, and the COVID-19 situation in particular, Inside Sales is more relevant than ever before. The increase in digital channels, changes in customer behaviour and the shift away from face-to-face meetings mean that now is the optimal time to consider building Inside Sales capabilities in your organisation.

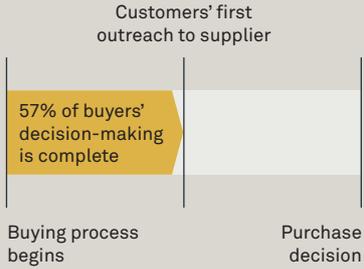
**#1** 

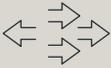
Digital channels **reduce cost and complexity** to serve, as they enable data-driven dialogues. Utilising tools like Google, SoMe, CRM, virtual meeting platforms etc. in your sales setup can actually **make your sales efforts up to 150% more efficient.\***



**#2** 

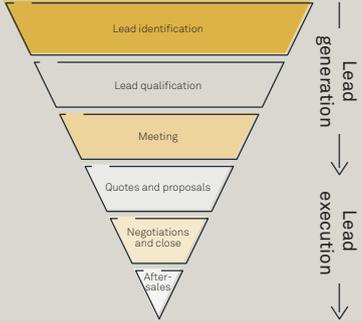
The B2B **buying process has changed** due to digitalisation and COVID-19. Nowadays, the customer is further along in their buying process before reaching out to sellers. And **57% percent of customers prefer not to spend time on face-to-face meetings\*.**



**#3** 

There is a **disconnect** between **lead generation and following up on leads** in B2B companies due to misalignment between Marketing and Sales\*\*.

**7 out of 10 B2B companies do not execute efficiently on their leads.**



\*Sales Benchmark Index 2017.

\*\*Based on Implement's learnings from Inside Sales projects within B2B conducted over the last three years.

# Building your Inside Sales channel

Establishing an Inside Sales channel follows a three-step approach with each step involving different key activities.

This approach and the following examples are based on best practice and multiple customer cases conducted over the last three years.

We will begin by looking at customer segmentation and targeting in order to assess the growth potential, align roles/responsibilities between Inside Sales and Field Sales and identify where and how Inside Sales can add value.

## #1

Estimate **growth potential** and identify **Inside Sales growth levers**.

Key activities

### Segmentation and targeting

- Customer segmentation
- Customer service model for targeted customers
- Customer overview
- Growth potential estimate

Then, we will dive into the operating model to create the backbone of the Inside Sales team.

## #2

Build the **foundation** for the Inside Sales team as a growth lever.

### Operating model

- End-to-end lead process mapping
- Organisational setup
- Build virtual capabilities
- Systems and performance dashboards
- Design the Inside Sales funnel

Finally, we will investigate how we can accelerate the performance of a newly established or existing Inside Sales team.

## #3

Accelerate performance through **high impact drivers**.

### Acceleration

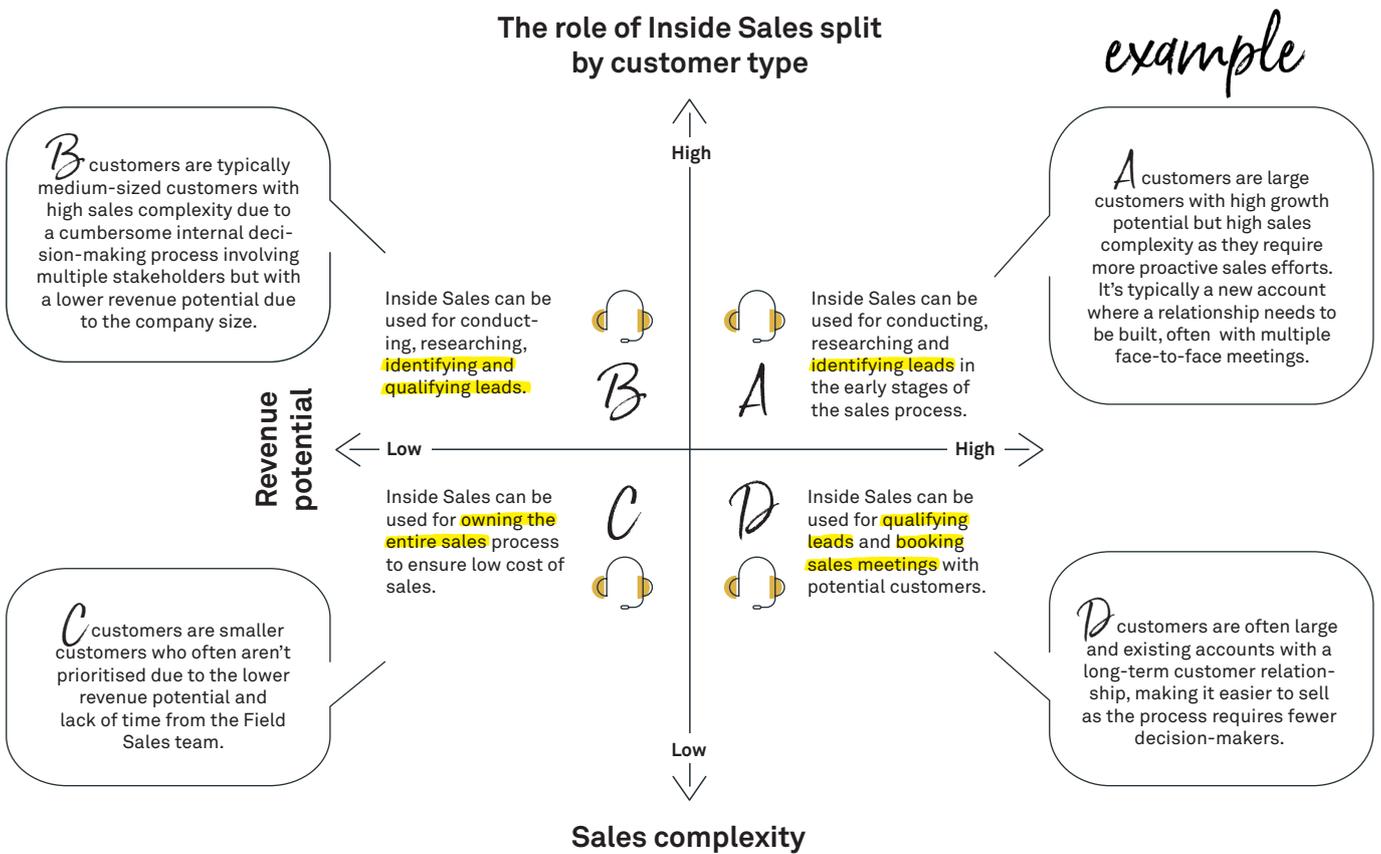
- Call flow model implementation
- Inside Sales efficiency boosters
- Coaching and training (virtually and physically)
- Performance visualisation

# Get started with segmentation and targeting

Start by understanding your customer segments and aligning roles and responsibilities between Field Sales and Inside Sales teams. Since the role

of Inside Sales will vary dependent on the customer type, revenue potential and sales complexity, a comprehensive overview of your customers and their

sales potential is key to identifying where and how Inside Sales can help drive growth.



Please note that the way you segment depends on your market dynamics, customer types and current sales setup.

#1	#2	#3
<b>Segmentation and targeting</b>	<b>Operating model</b>	<b>Acceleration</b>
Customer segmentation	End-to-end lead process mapping	Call flow model implementation
Customer service model for targeted customers	Organisational setup	Inside Sales efficiency boosters
<b>Customer overview</b>	Build virtual capabilities	Coaching and training (virtually and physically)
Growth potential estimate	Systems and performance dashboards	Performance visualisation
	Design the Inside Sales funnel	

# Aligning roles and responsibilities between Field Sales and Inside Sales

A traditional B2B sales funnel is typically an optimal way of aligning roles and responsibilities between Field Sales and Inside Sales and ensuring strong collaboration to align roles and responsibilities between Field Sales and Inside Sales and ensure strong collaboration. Inside Sales can be used in different areas of the sales

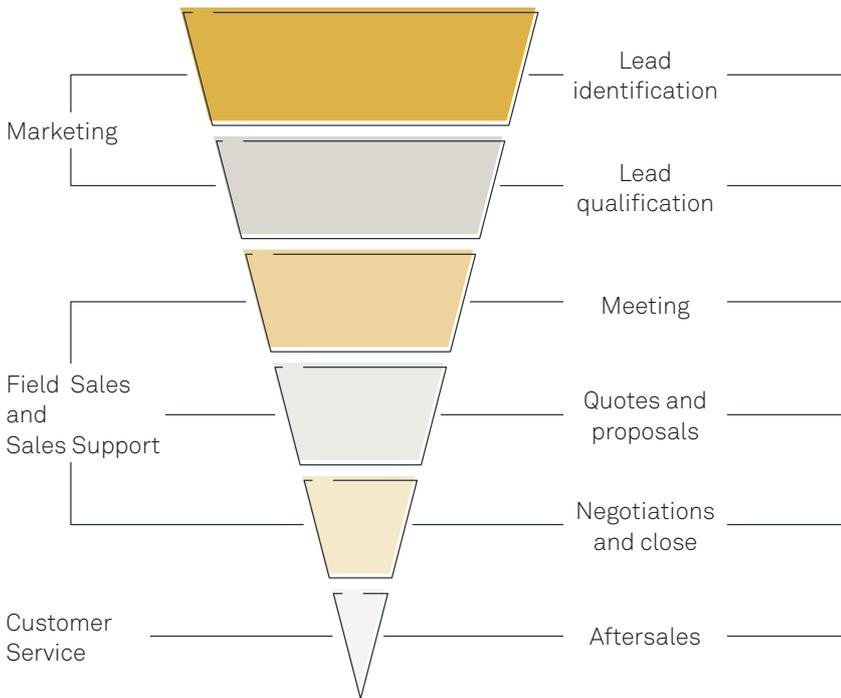
process, depending on the customer type. But some customer types are more suited to Inside Sales than others. In this example, Inside Sales can take customer type C all the way from the initial marketing campaign to the after sales call. For other customer types, Inside Sales can act as a collaborative tool for Field Sales and other functions

by providing key customer insights in the beginning of the process. Please note that the use of Inside Sales varies from company to company and depends on the current setup, market dynamics and how large you define its role.

*example*

## Traditional B2B sales funnel

### Current setup



Inside Sales can be used in most areas of the sales funnel, dependent on the customer type

	A	B	C	D
Lead identification	✓	✓	✓	✓
Lead qualification	○	✓	✓	✓
Meeting	○	○	✓	✓
Quotes and proposals	○	○	✓	○
Negotiations and close	○	○	✓	○
Aftersales	○	○	○	○



# Start building the Inside Sales operating model

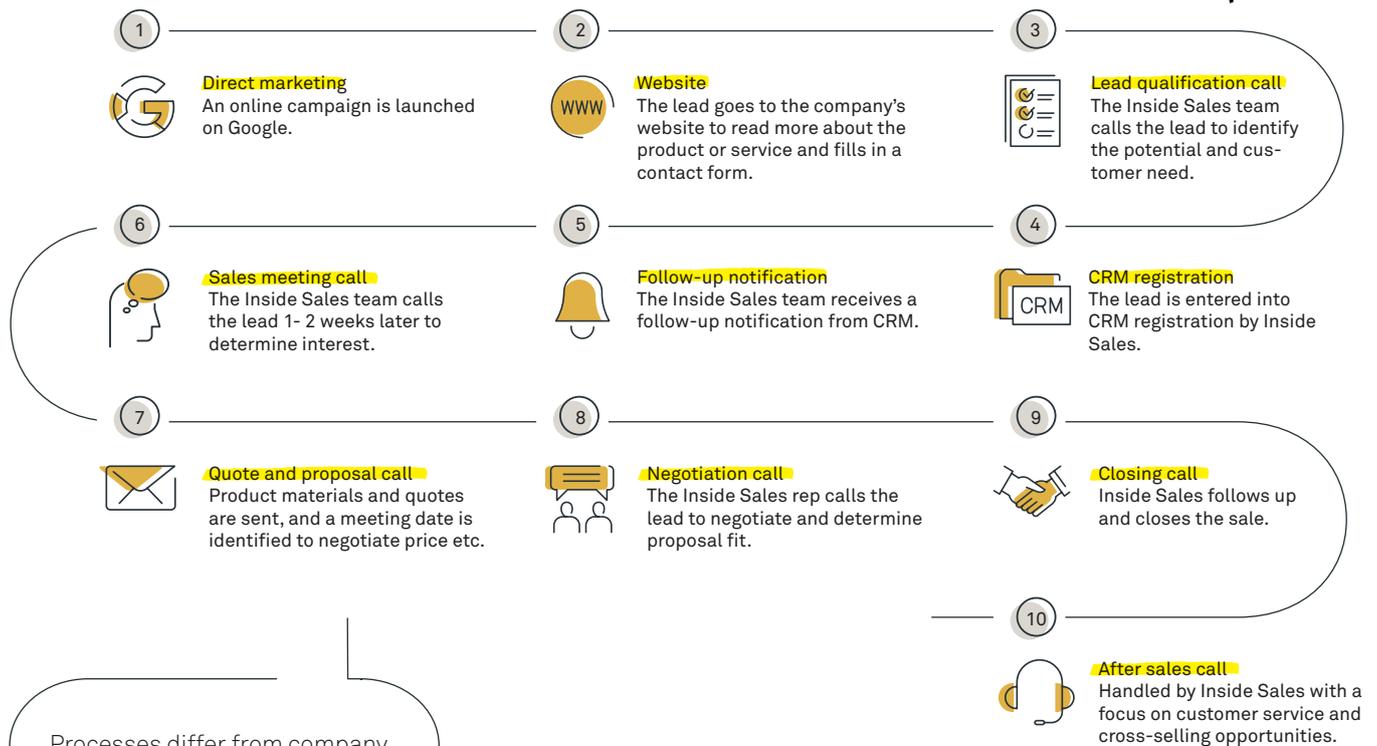
Mapping end-to-end processes that reflect the new sales funnel is a key first step in setting up your Inside Sales operating model. Clearly outlining end-to-end processes for

each customer type ensures a strong customer experience and eases the internal responsibility change process between Field and Inside Sales. This also provides a step-by-step guide

for the role of Inside Sales for each customer type through the sales journey, while also highlighting areas for collaboration between Field and Inside Sales.

## Example based on a case company with C customers

*example*



# Establish the Inside Sales organisational blueprint

Once the end-to-end process is mapped out, you can start creating an organisational blueprint for Inside Sales. This will enable you to build a new unit within your organisation – a

kind of additional sales force that will contribute to and collaborate with the existing Field Sales setup. With a clear split between the competencies and tasks of Inside Sales, Customer Service

and other internal teams, it is vital that Inside Sales is established as its own unit and not simply treated as an add-on function.

## Four design principles are needed to establish a strong Inside Sales function

### 1. Clear roles and responsibilities

To enable Inside Sales as a sales channel and to avoid the team being split between too many responsibilities, create a clear division from other inbound teams like Customer Service, Complaints, Orders etc. and define Inside Sales as a sales unit that primarily focuses on conducting outbound sales calls.

### 2. Regionalised

This varies a lot from company to company, but it often helps if you mirror your team structure with that of Field Sales. If Field Sales is structured by regions and territories, Inside Sales should do the same. This helps create a one team mindset between Field Sales and Inside Sales, and it will significantly accelerate your internal change process.

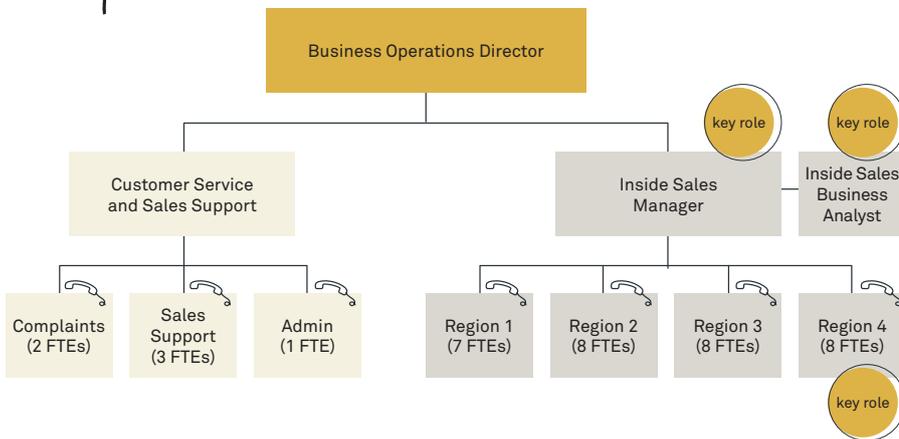
### 3. Sales incentive structure

Incentivising your team as a sales team with targets and a bonus structure will help you create a strong performance mindset and enable you to drive Inside Sales as a sales unit.

### 4. Sales-minded people

To become a sales unit you need to get the right sales-minded people in your team. Since this will be an outbound, performance-oriented unit, you need people who thrive doing exactly that.

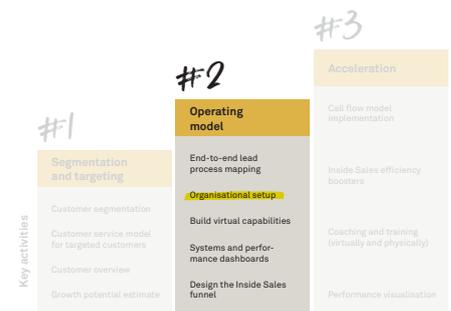
*example*



## Customer Service and Inside Sales calls are very different

Customer Service support is typically an inbound function with people who strive to help customers with Q&A and complaints.

Inside Sales calls are typically an outbound function with people who strive towards high performance and sales.



# Cultivate your virtual selling capabilities

Virtual selling skills are a key driver for selling in an increasingly digitalised world where physical meetings are not always possible – and it is a must-have

for any sales organisation. Establishing a strong foundation for conducting virtual selling sessions in your team by selecting the right technical platform, installing

new software and hardware and designing new kinds of customer meetings is key to ensuring a strong customer experience when selling remotely.



## Choose a virtual platform

Getting the right technical vendor is vital to achieving high quality interactions from the Inside Sales team. The right vendor will provide the team with the necessary functionalities to increase call efficiency.

### Examples

- Define your technical requirements
- Identify user and functional needs
- Initiate a vendor selection process



## Enable technical capabilities

For the team to fully utilise the technical platform, a rollout and onboarding plan needs to be in place. This will also keep employees on track and stop them from reverting to old ways of working.

### Examples

- Create a rollout plan
- Install new tools and methods
- Onboard employees to new ways of working



## Design meeting types

Sales teams need call scripts that are tailored to the type of meeting they are conducting. Fitting agendas and key selling points to the customer's situation will result in more effective meetings.

### Examples

- Design prospective meetings
- Design re-negotiation meetings
- Design key account manager meetings

## Examples of virtual meeting types



Basics	Prospecting	New sales	Account management	Sales management
#1 Create engaging virtual meetings	A Virtual prospecting messaging	D Virtual inspiration meeting	G Virtual onboarding meeting	J Virtual sales team meeting
#2 Craft an engaging virtual storyline	B Social selling	E Virtual RFP meeting	H Virtual value capture meeting	K Virtual opportunity coaching meeting
#3 Build engaging virtual presentations	C Virtual seminars	F Virtual demo meeting	I Virtual business development meeting	L Virtual performance and pipeline meeting



# Accelerating your Inside Sales team's performance

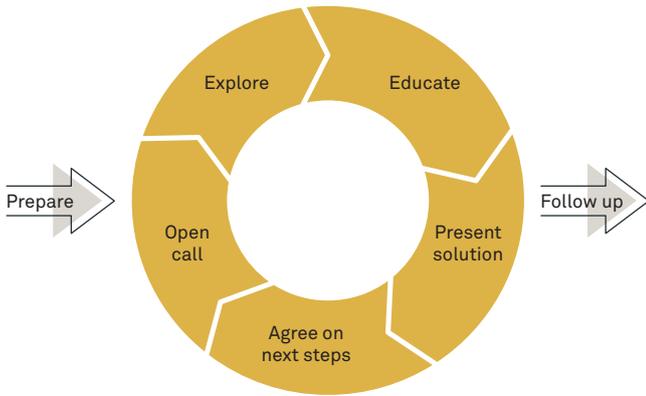
The third and final step of building an Inside Sales function is about rapidly increasing sales performance in your team. Acceleration drivers such as

sales models, lead prioritisation, sales coaching and performance visualisation can be installed to push performance forward. These examples are

typically the easiest to implement and provide the highest impact for Inside Sales teams.

## Introduce a common customer interaction model

(Five-step call flow model)



This creates a common end user interactive platform, enabling the sales team to develop their sales skills via feedback, training and coaching.

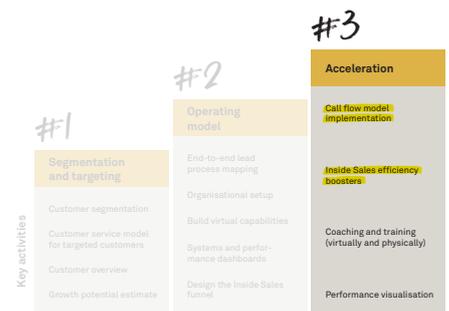
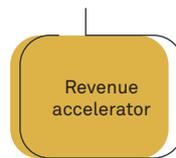


## Implement a simple lead prioritisation matrix

(Lead prioritisation)

Lead type	Lead priority	Lead follow-up call (#of call attempts)	Demo/ quota call (#of call attempts)	Negotiation/ Closing call (#of call attempts)
Competitor	Medium (4)	3	1	1
Competitor user	High (1)	5	3	2
Unknown	Medium (3)	3	2	1
Accessories: existing customer	Low (6)	N/A	N/A	Email
Accessories: competitor user	High (2)	N/A	3	2
Accessories Unknown	Medium (5)	N/A	2	1

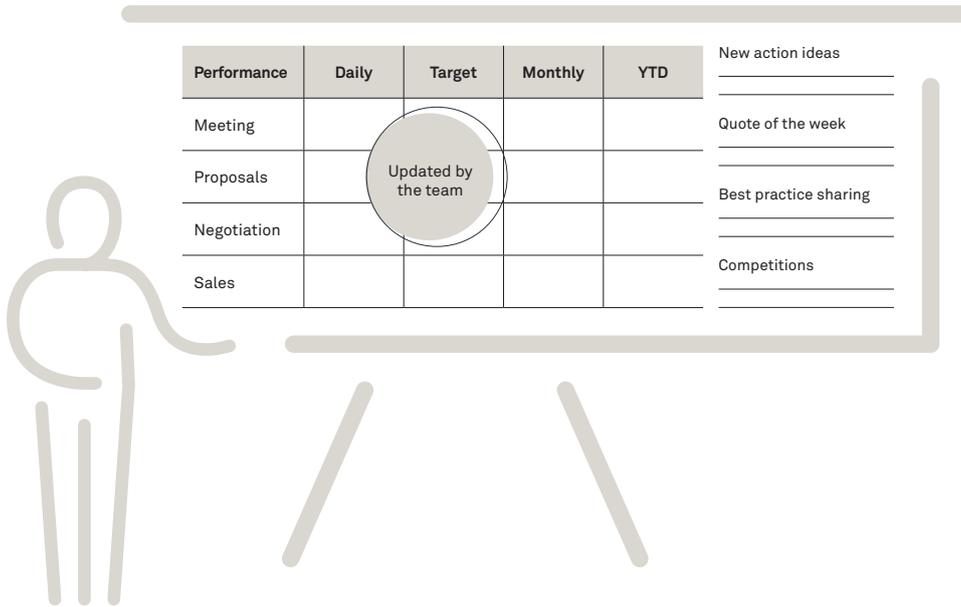
Clearly assessing the importance of leads enables the team to prioritise high value leads in periods of backlog, thereby helping to drive revenue.



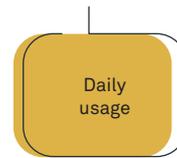
## Accelerating your Inside Sales team's performance (continued)

### Visualise your team's performance

(Winboard)



Visualising daily performance with a winboard creates excitement and enthusiasm within the team to increase sales.

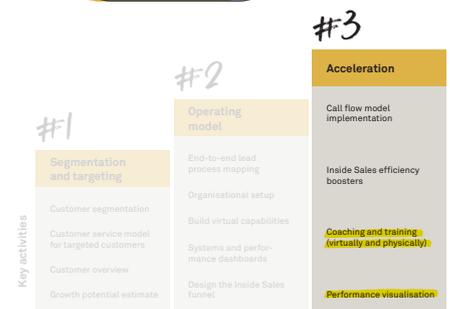


### Establish a fixed cadence for coaching and training

(Virtually and physically)

Meeting type	Minimum standard (frequency)	Coaching duration	Total time spent (rep per month)	Interaction style
<b>Pre-call coaching</b> # of pre-call coaching sessions with Inside Sales rep	Twice per month (bi-weekly)	15-60 minutes	1-2 hours	1. Face-to-face 2. Skype (with video) 3. Phone
<b>Call listening and post-call coaching</b> # of call listening and post-call coaching sessions	Twice per month (bi-weekly)	60-90 minutes	2-3 hours	1. Face-to-face 2. Skype (with video)
<b>One-to-one coaching</b> # of skills and coaching sessions with Inside Sales rep	Once per month (end of the month)	30-60 minutes	0.5-1 hour	1. Face-to-face 2. Skype (with video) 3. Phone
<b>Team huddles</b>	Daily	5-10 minutes	1.5-2 hours	1. Face-to-face

Structured training and coaching on a continual basis helps develop the team's skills, taking their sales capabilities to the next level and accelerating their performance.



# Six considerations before embarking on your Inside Sales journey

Building a successful Inside Sales team requires an in-depth understanding of your customers, a clear overview of your operating model and implemen-

tation of acceleration drivers to ensure high performance. Before embarking on your Inside Sales journey, you should ask yourself six key questions.



How do we get **management support and buy-in**?

Global and local management teams are strong change drivers and need to be on board.



How do we ensure the **right set of competencies**?

Almost 70% of all companies do not have dedicated Inside Sales resources and capabilities in place, meaning that there is huge untapped potential in sales efficiency.



How do we ensure the right division of **roles and responsibilities**?

Most companies have Inside Sales support or a Customer Service function, but the people on the phone often have too many roles and responsibilities.



How do we **encourage collaboration** between Field Sales and Inside Sales teams?

Most companies do not encourage collaboration between Field Sales and Inside Sales with clear alignment of roles and processes.



How do we cultivate a **performance mindset**?

Inside Sales is typically not driven as a sales unit in terms of clear targets and incentive structures.



How do we **foster trust** between Field Sales and Inside Sales teams?

Most companies experience low levels of trust between the Field Sales and Inside Sales teams, challenging the synergies between the two teams.

## Implement at a glance

With 850 employees and a large team of marketing, sales and commercial excellence experts, we are ready to help you get started with B2B Inside Sales.

**77** people with commercial excellence experience

**+500** commercial, sales and marketing projects

**+40** FTEs working with sales optimisation



### International experience



## How to get in touch

The world is begging for change. Let's go make it. We are ready to work alongside the world's most ambitious clients, taking on their toughest challenges.

### **FAST FACTS ABOUT IMPLEMENT**

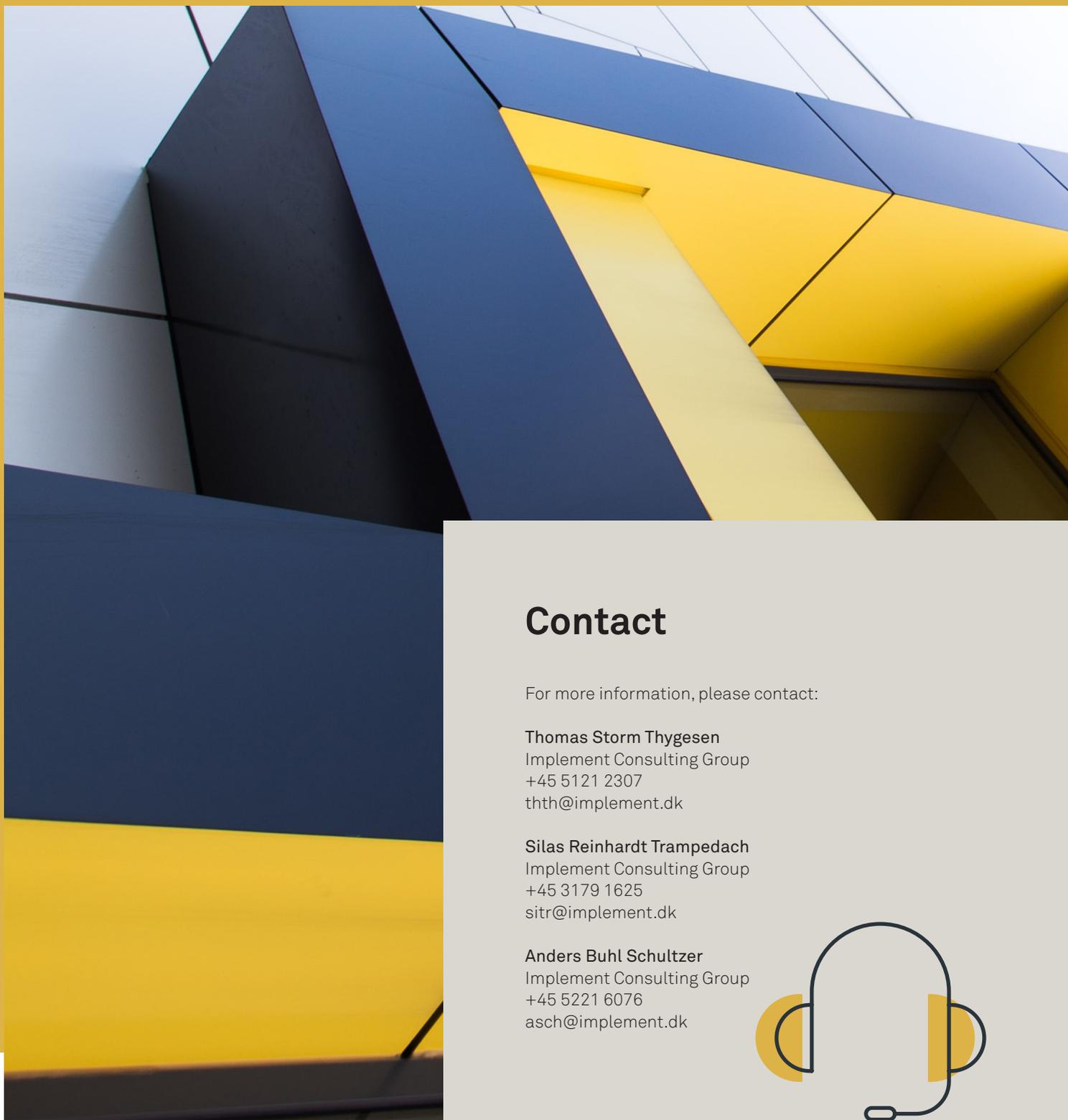
Founded: 1996

Number of employees: 850

Headquarters: Copenhagen

Offices: Aarhus, Stockholm, Malmo, Oslo, Zurich and Munich

[implementconsultinggroup.com](http://implementconsultinggroup.com)



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