



Lessons From The Accounting Office:

How The SALT Group Doubled Its Sales Performance & Hit Aggressive Goals

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Carrie's Texas Love Story

- Retired from Dell.
 - >\$80 Billion in revenue
 - Tons of Processes and Infrastructure
- Then I met Harlan
- Love ensued.
- “Move to San Antonio. We need you.”
- Negotiation commenced.
- Outcome – I moved and we got married.
- New job. New objective. — Triple revenues in 3-5 years.



Getting to Work

- To meet growth goals, we needed infrastructure!
 - Sales Processes
 - Customer Onboarding
- Existing systems were inadequate
 - Goldmine
 - Homegrown job tracking system
- Changes to systems required expensive, custom programming.
- #hostage



Infrastructure Requirements

- Must be **User Friendly**
- Must be **Easy to Customize**
- Must be **Affordable**
- Must **Scale for Future Requirements**
- *#BalancingAct*

“What do I need to build now, to manage that future sales number?”



The Evaluation & Decision

- Considered Salesforce.com
- Considered Microsoft Dynamics
- Considered VanillaSoft
- Purchased
 - VanillaSoft for Sales Engagement
 - Appointment Setters
 - Insides Sales
 - Salesforce.com for Customer Relationship Management
 - Customer Onboarding
 - Job Management

“The biggest problem with other tools is they weren’t plug-and-play. They needed huge development efforts to customize them, additional 3rd party components, and external consultants.”



Why Not SFDC Across The Board?

- No out-of-the-box inside sales offering
- Extensive customization would be required
- No concept of:
 - Intellective Routing
 - Geo-Mapping
- It was Task-centric vs Result Codes
- Too big for a vendor/client partnership
 - Was able to work hand-in-hand with VanillaSoft leadership & engineers
 - VanillaSoft was extremely receptive to capability requests
- *#partnership*



Where to Start?

- Minimal measurements, limited to high-level numbers
- No ability to measure performance of appointment setters or inside sales people
- Couldn't answer questions like **“How often is an agent having an engaging conversation?”**
 - *Agent makes 150 calls per day*
 - *Talks to 10 people*
 - *80% of 10 conversations say “Go Away!”*
 - *20% of 10 conversations will be meaningful and require next steps*
 - *Did we know this detail? NOPE!*
 - *But we knew they made 150 calls per day.*



Implications

- How do we know what process improvements to make?
- What do we need to provide for training?
- What tactics and processes generate positive outcomes?
- Who are the good reps?
- How do I track and trend our progress?

*“If you can’t measure it,
you can’t manage it!”*



Introducing Results Codes

Result Codes are a standardized list of pre-defined actions, used by agents, to denote:

- 1. What happened on a specific Contact engagement and,*
 - 2. Automate the next steps (i.e. routing, follow-up, etc.)*
- These are the opposite of Tasks, such as used in SFDC / CRM
 - Everything is pre-defined — allows for standard reporting and analysis
 - Unable to progress to next contact — ensures agent records every activity
 - Doesn't rely on Agent determining next engagement — standard cadences
 - One-click disposition — increased agent productivity



Contact Engagement

Result Code

Lead Management

Follow-up

Automatically establishes call back cadence

No Answer

Automatically sends email and establishes call back cadence

Call Back

Opens calendar to set specific call back date/time

Set Appm't

Opens calendar to set specific appointment date
Routes lead to appropriate sales rep

Not Now

Automatically sets up email drip campaign

No Interest

Sets call back date 6 months in future

Do Not Call

Removes contact from calling queue

Reports: date, call duration, agent, result, comments



Optimizing Our Activity

- Defined our Result Codes to tell us what happens on every call
- This allowed us to understand:
 - Agent effectiveness
 - Where to improve training
 - Where to route the lead for the next touch point / contact engagement
- Intelligent Routing, based on the Result Code, ensures the lead is contacted again tomorrow, next week, two months from now, never, etc., using pre-defined channels (phone, email, etc.)
- Advanced routing options using geo-locations
- Result Codes force-feed behaviors & action in a few keystrokes
- Lead Status defines pipeline contribution and progression



Driving Growth

- We now have standardized insights, metrics, and outcomes
- Appointment Setters & Inside Sales engage leads continuously with defined cadences. No more one-and-done.
- Each agent is now accountable to progress defined number of leads
- Weekly review of pipeline progression
- Process changes and refinements implemented in VanillaSoft quickly — it's a blank slate that adapts to you.
- Our sales performance has more than doubled as a result.



Lessons Learned

- Study and identify user behaviors that are impacting your ability to have standard metrics, KPIs, behaviors, lead engagement, etc.
 - Tasks vs Result Codes
 - Cadences vs Agent-led follow-up
 - Process flows vs ad hoc lead management
 - Nimble processes adaptation vs expensive and manual customizations
- Eliminate negative human behaviors (i.e. cherry picking)
- Establish a baseline prior to deploying new solution to track your impact
- Contact every lead, in a defined cadence, at least 6-8x
- Follow-up new leads quickly (< 1 hour)





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Encore

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