people.ai

Drive Higher Sales Methodology Adoption and Record Win Rates With AI and CRM-Native Tools

The annual sales kickoff is over and your team is flying home. Based on your sales plays and breakout sessions, it seems like your reps are committed to the new sales methodology your organization has spent a significant amount of time and budget on. You're optimistic that numbers will beat expectations and that your CRM will see more action than ever before.

Fast forward one quarter: why do managers now seem exasperated with an entire team of reps who have abandoned the new methodology?

One reason could be that your sellers aren't logging important qualification data into your CRM. Instead, deal details are scattered across spreadsheets, post-it notes, and emails between your sellers and prospective buyers. As a result, sales managers can't easily validate that reps are properly qualifying opportunities and following the sales methodology in the first place.

Why is this problematic? According to a recent study, an astounding 82% of B2B decision-makers think sales reps are unprepared to make a sale[1]. When sales managers don't have a clear line of sight into qualification details, they can't coach their reps on next steps, nor can they project close dates or reset expectations on overall pipeline health.

This lack of visibility into the adoption and impact of your sales methodology has a cascading impact on your business: at-risk deals, wasted time, revenue slippages, and missed forecasts. Meanwhile, the new sales methodology is quickly abandoned, CRMs continue to be underutilized, and reps and managers return to old habits.

PREPare for sales methodology success with this checklist:

Every sales methodology has a memorable acronym: MEDDIC, BANT, SNAP, or SPIN. Follow the steps in this checklist to add other sales acronym to your vocab: PREP

- [ ] **Predict your pipeline confidently** using a consistent sales qualification methodology that is easy to execute and track from your CRM.

- [ ] **Reduce sales cycle time and late stage losses** by identifying strengths, weaknesses, and blind spots in opportunity qualifications.

- [ ] **Execute and close larger deals, faster** by understanding which decision makers need to be involved in each conversation and by increasing visibility within buying groups.

- [ ] **Produce predictable revenue** by improving rep onboarding, adoption, and adherence to the methodology.

1. State of Saas Sales: Challenges, Skills, and Tech

A CRM-native, process-agnostic software that helps reinforce and measure the impact of your sales methodology

Regardless of the sales methodology you're using, your organization hired salespeople to build pipeline, qualify deals, and close business. People.ai can help you execute, track, and measure your sales methodology with a rich set of scorecards, dashboards, and insights.

CRM-native Capabilities
Capture qualification details, ensure stage entrance/exit criteria are met, and outline next steps – all in a single place. By keeping reps in your existing CRM, we take tool fatigue out of the equation to increase methodology adoption and compliance rates.

Customizable Opportunity Scorecards
Track deal qualification and progression using out-of-the-box or custom scorecards. Ensure your methodology is followed in an easy, repeatable way, and give sales managers the insights to quickly track adoption at the rep, account, and opportunity level.

Relationship Maps
Use handy organizational charts that link contact and lead records in one place. People.ai uses your defined sales methodology to capture potential buyer personas and add them to the map. Behind the scenes, the maps can be easily enriched and maintained as new sales activities are captured in your CRM or as contact details change.

Stakeholder Insights
These data-driven profiles provide a clear understanding of how well your reps have engaged key contacts such as champions or economic buyers. Engagement scores are calculated based on how much activity and time is spent with decision makers, and can also pinpoint which contacts will have the largest impact on a given opportunity based on historical activity with similar accounts and deals.

Customer experience tech group TTEC went from offline spreadsheets to seamless data automation and record win rates

"Our sales team possessed highly skilled resources that we wanted to ensure were applied to opportunities that we had a high propensity to win. We knew improving our current structure was our first priority for qualified opportunities to come through to our teams. People.ai was exactly what we needed to achieve this."

Jonathan Gray
Senior Vice President

ttec™

Outcomes Included:

- Centralized deal qualification to one tool

- Increased rep satisfaction and productivity by eliminating manual tasks

- Achieved higher win rates using AI-powered insights

Read the full case study

Prepare for sales methodology success with People.ai

Learn more about how to measure and validate the success of your sales qualification methodology by downloading our workbook or by requesting a demo.