













4 Reasons Why Your Sales Methodology is Failing (And How to Fix It)

Introduction

As a Sales or Operations leader, deploying your new sales qualification methodology as Fields in Salesforce on the Opportunity is tempting. On paper, this approach is a quick and easy configuration change. So why does adding fields to track your methodology fail? And why is it so hard to measure the success of your sales methodology?

Here is a side-by-side comparison of how sales methodologies typically perform alone and when People.ai Opportunity Scorecards are utilized.

Expectation	Typical Sales Methodology Fields on Opportunity	People.ai Opportunity Scorecards
 Configure the correct deal size and complexity to the scorecard		
 Understand gaps and potential deal risk		
 Seamlessly make multiple revisions to a scorecard template		
 Easily report on scorecard metrics alongside opportunity engagement		

Let's break down why this is true.

1 Apply the correct deal size and complexity of the scorecard based on deal size, regions, etc

With static sales methodology fields, you are stuck with one version of the fields, that may be a fit for one team but not another. This is very limiting even for small companies let alone large global enterprises. For example, enterprise vs. small business may have very different questions, complexity, and deal length.

The screenshot shows a form titled "Before Scenario" for "Opportunity A". It features a section for "MEDDPIC" with a dropdown menu. Below this, there are several rows of fields, each with a label and a status field. The fields are: "MEDDPIC Last Reviewed Date", "Metrics", "Economic Buyer", "Decision Criteria", "Decision Process", "Paper Process", and "Identified Pain". Each of these has a corresponding "-Status" field. The form is static and does not allow for customization based on the opportunity.

Sales methodology opportunity fields are static and limiting

With People.ai Opportunity Scorecards, the correct scorecard can be configured to load automatically based on any field on the Opportunity; for example "Opportunity Type". Multiple fields can be combined for complex filter logic.

The screenshot shows the "Filter Settings" interface in People.ai. It includes a search bar at the top. Below, there is a section for "Enable Filters" with a toggle switch. Underneath, there are three filter settings: "Filter 1" (Picklist (Single)), "Filter 2" (--None--), and "Filter 3" (--None--). A dropdown menu is open for "Filter 1", showing a list of account types: "-- None --", "Prospect", "Customer - Direct" (highlighted), "Customer - Channel", "Channel Partner / Reseller", "Installation Partner", "Technology Partner", and "Other". At the bottom, there is a "Filter Logic" section with a default value of "1 AND 2 AND 3". "Save" and "Cancel" buttons are at the bottom right.

People.ai Opportunity Scorecards allow you to customize based on any field on the opportunity

2 Understand (and visualize) gaps and deal risk if the champion or economic buyer is not being engaged

With static sales methodology fields, you are relying on the rep to tell you anecdotally whether they are engaging the champion or economic buyer. This is because their engagement data with these contacts are often almost always missing in CRM, and difficult to report on.

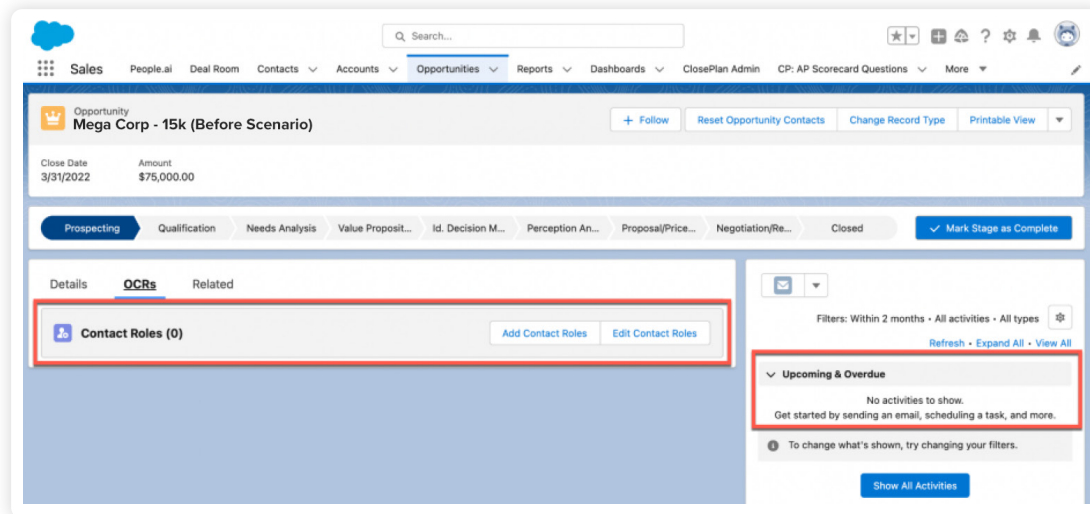
People.ai Opportunity Scorecards are dynamic snapshots of the overall health of each opportunity which can be customized to adhere to any sales methodology. Available directly within any Salesforce opportunity page, they easily and intuitively guide reps to provide robust data about

each opportunity, with each question and category pre-selected by sales leadership.

Those activities are then measured automatically to highlight the strengths and weaknesses of each deal, identify gaps, and inform next best actions. For example, it will flag when an identified economic buyer or champion has low engagement. It can also recommend who might be additional candidates for these roles based on engagement levels.

A single dashboard view of all opportunities in the pipeline offers unparalleled visibility into the health of every deal for more accurate forecasting. Opportunity Scorecards also create consistency across the organization by helping every rep easily adhere to your sales methodology.

Watch this video to learn more about [Opportunity Scorecards](#)



When reps have to update the CRM manually, data can be missing and it's hard to understand engagement levels and deal risk

3 Seamlessly make multiple (old and new) revisions to a scorecard template to manage change without disruption to the business

Managing multiple revisions of a sales methodology template using static Salesforce custom fields is impossible because you have limited custom fields in Salesforce. You quickly run out of fields as you manage multiple templates and multiple versions.

Custom Fields Allowed Per Object

The number of custom fields allowed per object varies according to your Salesforce Edition.

PERSONAL EDITION	CONTACT MANAGER	GROUP EDITION	ESSENTIALS EDITIONS	PROFESSIONAL EDITION	ENTERPRISE EDITION	UNLIMITED AND PERFORMANCE EDITION	DEVELOPER EDITION
5	25	100	100	100	500	800	500

There is a 900 maximum hard limit on the total custom fields per object allowed. In addition to the limits listed above, you can install fields from the AppExchange for a total of 900 custom fields. For example, for the Unlimited Edition, you can create 800 custom fields on an object plus install 100 fields from a managed package and 100 of the fields are limited to specific objects. For the Enterprise Edition, you can create 500 custom fields on an object plus install 400 fields from a managed package and 100 of those fields are limited to specific objects.

Static form fields limit the number of custom fields per object

People.ai has built-in version control in the scorecard template administration process, giving you unlimited flexibility in the number of templates and versions you can manage without running into any field limitations.

Opportunity ClosePlan Template
Your Sales Methodology v5 LOCKED

Clone New Version Edit Back

Detail Playbook Scorecard Scoring Tiers Relationships Export Presets

Template Information
Name: (DK) MEDDICC
Description:

Version Information
Version Name: v5
Version Description:

Status: Active
Deploy Status: Deployed

Deployment Settings
Playbook Timing: Playbook will end with Close date
Filter Criteria: Edit Filters

Enabled: ☒
Filter 1:
Filter 2:
Filter 3:

Versions

- v a054W00000hKq57UAE COPY Draft
- v a054W00000hKdKkUAE COPY Active
- v a054W00000hKdKkUAE COPY Archived
- v a054W00000ZqT1hUAF COPY Active
- v a054W00000ZqTjgUAF COPY Active
- v a054W00000Zq8OaUAM COPY Archived

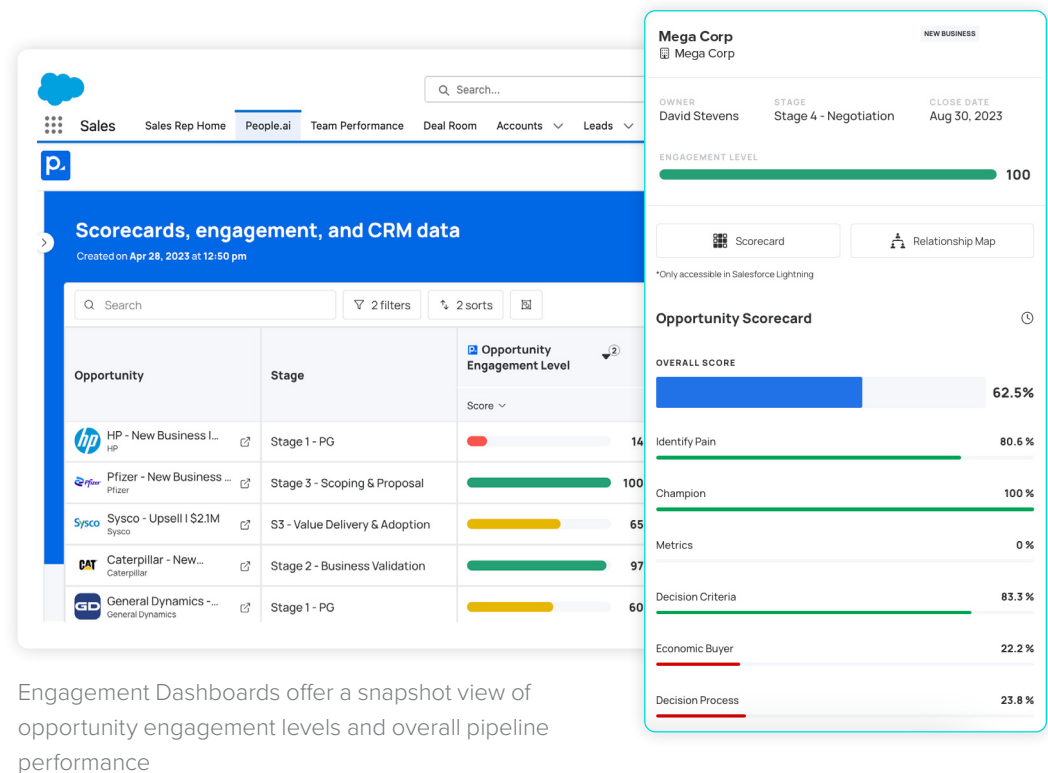
People.ai offers unlimited flexibility in the number of CRM templates, versions, and fields

4 Easily report on scorecard metrics and opportunity engagement at multiple elevations (CRO, Front line manager, Rep)

Reporting on static sales methodology fields can be frustrating. While it may be appropriate for the individual rep, it becomes very hard to report up and through different roles in the organization, including Sales Leaders, Operations Leaders, CROs, and Frontline Managers.

Using People.ai, sales leaders can pull data directly from Opportunity Scorecards into their easy-to-use, native Salesforce reporting. This introduces efficiency into sales processes and unifies GTM teams, resulting in more predictable growth (no engineering or data science skills required).

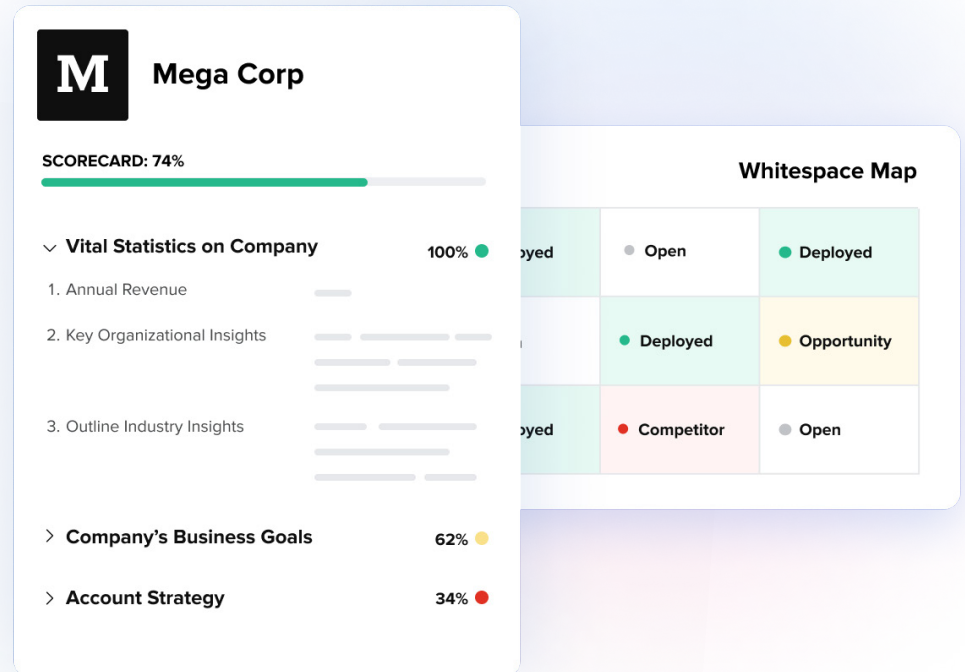
For more robust reporting capabilities, a powerful complement to Opportunity Scorecards are Engagement Dashboards. People.ai Engagement Dashboards offer powerful data-driven insights into the performance of GTM teams embedded right within the CRM. Engagement Dashboards can be customized for the right roles - Rep, Operations Leaders, CRO, and Frontline Managers. Each customized view provides 360-degree views and reporting capabilities into the pieces of the team's GTM motion that matter most for their role.



Engagement Dashboards offer a snapshot view of opportunity engagement levels and overall pipeline performance

People.ai Opportunity Scorecards (and Engagement Dashboards) don't replace your sales methodology. They help make your sales methodology work for you by offering flexible customization, unprecedented visibility into each opportunity, easy risk mitigation, and customized reporting capabilities. Use Opportunity Scorecards directly inside your Salesforce to correlate measurable scores with sales activity to ensure consistent, efficient processes and increased pipeline conversion.

Sign up for a demo to learn more [Opportunity Scorecards](#)



Are you ready to meet your new revenue co-pilot?

Learn more about how People.ai's solutions can transform the productivity and culture of your GTM teams.

[Learn More](#)

[Request a Demo](#)

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