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# The Four Pillars of End-to-End Sales

*Think sales are simply transaction-based?  
You're missing the opportunity to exponentially  
expand revenues*



**INTRODUCTION:**

## **Building Sales Begins with Building Relationships**

*Does the word “sales” bring to mind the proverbial used-car salesman cajoling hapless customers into buying something they’d later regret?*

Or the cold-sweating cold-callers of Glengarry Glen Ross, viciously competing to earn a fresh batch of hot leads? If so, it’s time to readjust, because in today’s world, sales is first and foremost about relationships.

In fact, end-to-end sales consists of four pillars: *Connect, Engage, Convert, and Retain.*

This guide will take you through each of these pillars so you can see how they work together to support a repeatable, scalable process—one that creates not just happy customers, but loyal brand evangelists.

### ***The Four Pillars of End-to-End Sales***

- Connect with potential customers online or off, via social media, advertising, events, email, and websites.
- Engage with prospects to understand their needs, inform them of the solutions, and position you and your organization as a trusted resource.
- Convert prospects into customers by establishing value, confirming specific needs, closing the sale, and connecting them to others within your organization who can add value.
- Retain customers with best-in-class customer service that keeps people coming back, and build brand enthusiasts.



## 1. CONNECT:

# Gathering Leads

*Here's the understatement of the year: Before you even start talking to your customers, it helps to have a good idea of who they are.*

By creating personas representing each customer profile, you can devise customized campaigns to target each one, and offer them solutions to meet their needs.

### **Create Customer Profiles with Questions, Not Answers**

To understand potential customers, you should be asking questions.

**Here are just a few:**

- Who is the customer? Identify company characteristics, such as size, industry, budget, etc., and individual customers.
- What are they looking for? What problems do they have (whether they know it or not) that you can solve?
- Where do you find them? What social media sites do they frequent? What professional organizations are they part of?
- Why should they consider you? How will your solution help their bottom line?
- When do they need it? Ideally, you want to catch your potential customer when they're in the process of seeking solutions.
- How do you reach them? There are many ways to reach customers: advertising, social media engagement, websites, and more. What combination works best?



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## Connect with campaigns

Once you have built and analyzed your customer personas and developed your approach, it's time to start capturing leads. This is best accomplished by creating campaigns. A lead-generation campaign is a plan to reach a particular market segment, and it addresses each of the questions you've asked above. Campaigns can include marketing programs such as direct mail, email blasts, webinars, conferences, and trade shows. The idea is to attract potential customers with an offer (such as a white paper, a demo, or a webinar) that leads to a sale. This is also known as "ka-ching!"

### *IfByPhone: Meet Marketing Mark*

IfByPhone, a provider of voice-based marketing automation based in Chicago, created five ideal customer personas, explains Cindy Pogrund, executive vice president, customer experience. Marketing Mark, for example, is a marketer manager, director, or vice president. Mark runs numerous types of marketing but is frustrated by his inability to include phone lead data in his reports because he can't track inbound calls back to specific ads and marketing assets—a problem IfByPhone's product can solve.

To reach Mark, IfByPhone created a white paper that addressed his core problem. The paper included a call to action to request more information with a unique, trackable IfByPhone number that ties any calls back to the asset. Several advertising initiatives promoted the paper: a pay-per-lead (PPL) campaign with third-party syndicators, a pay-per-click (PPC) keyword campaign, banner ads on display networks targeting Mark's profile, and sponsorship of third-party email newsletters that Mark reads. Meanwhile, IfByPhone marketers posted information about the paper on the company's blog and social media accounts. Every message included a call-to-action (CTA) driving readers to a download page that captured names and emails. "Of course, we can track all of this in Salesforce," Pogrund says. "We know who opened what content and when."



## 2. ENGAGE:

# Turning Leads into Prospects

*So far, we've really just considered leads in the aggregate, as a group—first as hypothetical personas, and then as real but, alas, anonymous people. But of course customers (and hence leads) are individuals.*

The process of transitioning a group of leads into individual prospects is known as qualifying. Simply put, a qualified lead is one that matches the most important criteria you established with your ideal customers—and that means learning everything you can about them.

### Qualifying Leads

Think of qualifying leads as panning for gold. You start out with a bunch of promising-looking rocks, and as you swirl that pan in the river, the less valuable stuff floats away bit by bit until you're left with pure, 24-karat goodness: customers who need and want what you're selling. **Here's how:**

- **Self-qualification.** If a customer comes to your site as the result of a campaign, you can ask them to provide some information in exchange for whatever you're offering them, (e.g., a white paper, email newsletter, trial software). Generally speaking, the more valuable your offer, the more information you can request.
- **Research.** If you have a company name for a promising lead, you can check out their website or profile on services such as Hoover's or Yahoo Business, or read press releases on PR Newswire. If you have an individual's name, you may find them on LinkedIn, Facebook, and Twitter.
- **Phone or email.** Let's say someone downloads a trial version of your software or white paper. Follow up within 24 hours by phone or email, and see if they have any questions. The more contact you have, the greater the opportunity to qualify them.
- **Meetings.** Set up virtual or real-world appointments to learn more about a customer's needs and how you can meet them.

***Do all this, and congratulations: You're engaged.***



## Nurture the Relationship

As we mentioned at the outset, sales is the process of building a relationship with your customers. While you were previously only able to learn about the customer and her company externally, now you can hone in on the customer's specific needs, which involves listening and offering solutions—in other words, nurturing. Nurturing is the process of building relationships with qualified leads and prospects before they're ready to buy. Research indicates that more than 50% of leads are not yet sales-ready, so by nurturing them, you're reminding them of your value. If instead you wait until they're ready to buy to interact, you may already have lost them to a more nurturing competitor. "The big deal is expertise," says Linda Richardson, author of *The New York Times* bestseller, *Perfect Selling*. "Instead of simply responding to an inquiry, you have to add value and help them make a better decision; you shape the opportunity."

### *Recommind: The Nature of Nurture*

Recommind, an information management and analysis company, has found it requires multiple marketing touches and sales engagements to close a sale, says Craig Carpenter, vice president, marketing & business development. "The period of time from that first marketing touch to creating an opportunity and closing revenue can be anywhere from a few months to several quarters."

For that reason, he adds, it's important to make sure Recommind's marketing campaigns can show a return on every marketing dollar spent, and resources are focused where they'll generate the highest returns.

"It has become increasingly difficult to identify all of the marketing efforts that ultimately influence revenue," he notes. "Salesforce integrates with our marketing automation platform, giving us the ability to track and automate every touch with prospects, as well as track cost per lead. We might meet a potential customer for the first time at a trade show, and they will subsequently download a white paper or attend one of our seminars. At this point, they are ready to start the sales conversation with us. That end-to-end visibility is critical to analyzing our marketing spend."



### 3. CONVERT:

## From Prospect to Customer

### Presenting your case

*When you're ready to offer your solution, it should be tailored to your audience, and you should do it as a trusted adviser.*

Hone your pitch to match the benefits of your solutions with the problems they face, and detail how your product's features make this happen.

And keep in mind that sales is a team sport. "When it comes to collaboration, I've always found the whole to be greater than the sum of its parts," says Andy Gole, president at New York-based management consultancy Bombadil. "You can collect testimonials and case studies from across the sales team to create proving kits, or on a more basic level, you can poll the team to uncover the most effective questions to ask prospects."

### ***All Aboard: A Closed Sale Is Only the Beginning***

***Congratulations.*** You've closed the sale, made the deal. Mission accomplished? Not quite.

In fact, you are only at the beginning. You still need to "onboard" the customer. ***Here are important things to consider:***

- ***Introductions.*** A critical onboarding step is making sure you've forged connections between your team and your customer's team.
- ***Timeline.*** Everyone should be clear about what happens and when.
- ***Knowledge transfer.*** Help your customer use your product successfully. Consider training programs, written manuals, implementation experts, and ongoing best-practice information.
- ***Follow-up.*** Avoid buyer's remorse by continuously underscoring your value proposition, and troubleshooting any issues that arise.



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- **Community.** Your customers can benefit from mingling with one another. Get them together with online forums, social-media groups, and even real-world meet-and-greets.
- **Process standardization.** Standardize everything possible, and automate what you can.
- **Appreciation.** Finally, don't miss any opportunity to say "thank you" to your customers.

## *IfByPhone: Maybe on Board*

At IfByPhone, revenue depends on usage, so successful onboarding means that customers are taking advantage of every benefit the product has to offer. "While our cancellation rate is very low, we did notice that some accounts terminated after 60 or 120 days following very low usage," Cindy Pogrund says. "It turns out that many times, the person buying the product was not the one tasked with using it. She was a c-level executive or VP, and assigned implementation to someone else."

Rather than rely on that internal transition, IfByPhone implemented an automated onboarding process within Salesforce. The process identified the end user, recorded customer needs, and prompted the onboarding team to follow up at regular intervals to make sure expectations were being met. The team also created an "At-Risk Customer" dashboard that flagged clients whose contact information had changed or who showed lower-than-expected usage rates. "This is all happening in Salesforce," Pogrund adds. "No matter who a customer speaks to here, everybody knows exactly what's going on."





#### 4. RETAIN:

## Turning Customers into Fans

*A sale doesn't end with a transaction. Now it's time to wow your customers with the kind of service that makes them want to continue to work with you, create cross-sell and up-sell opportunities, and most importantly, recommend you to others.*

There's a name for businesses that do this well: Customer-centric. Building a customer-centric company isn't easy, but it is straightforward. It just requires wowing your customers with best-in-class service.

### ***Wowing with Service***

As in the other pillars of end-to-end sales, retention depends on deep knowledge of your customer and real-time—or better, predictive—response to their needs. ***Here are a few things to keep in mind:***

- ***Immediacy.*** Arming your front-line employees, such as customer-service reps, with the authority to resolve problems to the customer's satisfaction right away should be priority number one. Establishing comprehensive and effective self-service processes, such as online tools, empowers customers to help themselves.
- ***Ubiquity.*** Customers want access to you through a variety of channels. You should be actively engaged on social media, online chat, email, and other means of customer communication.
- ***Transparency.*** Be straightforward in your communications, clear in your policies, and sincere on those (hopefully rare) occasions when an apology is in order.
- ***Teamwork.*** Everyone in your organization—whether or not they interact daily with customers—is in customer service.



- **Process improvement.** Customer-centric organizations focus on every step in the customer's journey. Don't just fix individual customers' issues, but uncover the sources of the problems for long-term solutions.
- **Knowledge.** Those who respond to service requests should be aware of a customer's history, to give them a true, 360-degree view beyond the issue at hand, to the customer as a whole.
- **Humanity.** Finally, don't forget to be human. That means genuinely apologizing for mistakes and, of course, showing gratitude.

## *Recommind: Closing the Loop*

Maintaining a great relationship with current customers has numerous rewards for Recommind, says Craig Carpenter. "The customer is at the center of our ecosystem, informing everything we do. We have an active and ongoing relationship that gives us good insights into what they see coming down the pike."

The company taps into customer user groups who weigh in on possible new features or functionality or even potential product launches. "We can ask them, how would you use it? What priority would you give something like this? How much would you be willing to pay for it? Would you prefer to purchase software or pay by subscription?" What's more, Recommind makes a point of connecting current customers with prospects in their area during the many local events it holds.

"We use Salesforce to identify when prospects can interact with customers of ours, and we go out of our way to get these folks together at the same table," he says. "Happy customers are much more effective salespeople than we could ever be."



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## CONCLUSION:

# It's About Relationships

*We'll say it again: End-to-end sales is a relationship.*

And like any relationship, it thrives on communication and understanding. It starts with a connection—a spark—and becomes more meaningful as you nurture it with respect and trust. (It also doesn't hurt to be a good listener, and keep things interesting.) The best relationships, of course, are in it for the long haul. And doesn't everyone want a happily ever after?

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