

digital sales transformation

a blueprint for modernizing
your sales organization

the digital *divide*

It's hard to believe now, but there was a time when people doubted whether the internet would ever be a trustworthy sales channel—whether consumers would use it enough that digital ads would be viable, or whether people would trust online channels to make purchases.

While those doubts now seem laughable, the underlying reasoning still holds: **People struggle to let go of conventional sales wisdom and embrace leading-edge practices.**

In the past, conventional wisdom was that B2B buyers followed a linear, predictable, and controlled path. You can probably picture the funnel right now—from awareness to consideration to purchase and then advocacy.

Until recently, organizations continued to rely on the traditional funnel as the de-facto model for their sales process.

Pre-pandemic, they invested primarily in field sales and face-to-face meetings to drive revenue, while digital selling took a back seat. Organizations might have experimented with digital channels, but there was no impetus for company-wide transformation. It wasn't ideal, but the old model still worked. So businesses saw no reason to change.

Until, quite suddenly, they were *forced* to change.

Post-pandemic, the buyer's journey could not be less predictable. They're doing research, forming opinions, and narrowing their options at their own pace. And they're using digital channels with nearly equal frequency as they contact your sellers. None of these digital interactions—with your content or with your sellers—happen in a linear order.

All of this is creating the digital divide: Organizations continue to cling to sales practices that don't match how buyers today behave.

In this e-book, you'll see how one Fortune 500 company bridged that divide by moving from primarily field selling to a digital selling model, what lessons they learned, and the staggering results of their digital transformation.



Frank Pinder

EVP Digital Transformation Services
Corporate Visions



buying behaviors have *changed*

Today, **two out of three buyers prefer a digital self-service buying experience over traditional sales communications.**

Industry data also shows that digital sales motions are more effective than field selling motions. And companies are starting to wise up.

In fact, 74 percent of B2B decision makers now believe that new digital selling models are as effective as or more effective than pre-COVID models, according to McKinsey.

Additionally, 63 percent of Fortune 500 executives say they expect their field sales revenue to decrease, while 80 percent expect their inside/digital sales revenue to increase, according to Boston Consulting Group.

So, the message is clear: **If you aren't already embracing digital sales, the need to change has never been more urgent.**

But it's not enough to simply start sending messages on digital channels. Buyers are digitally savvy and well-informed. They're also inundated with texts, robocalls, sales emails, and ads, so they're hard to reach. And when you do reach them, they're skeptical of anything that smells like a sales pitch.

You can no longer expect your buyers to pick up the phone and call you with questions. You need to reach them where they are—on digital channels—but you need to do it well.

How would you prefer to interact with sales reps from your company's suppliers?

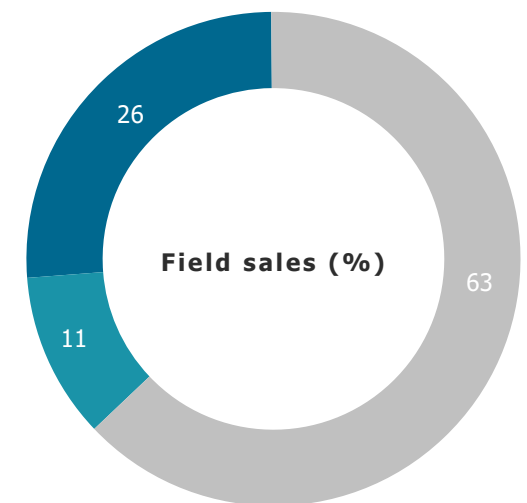
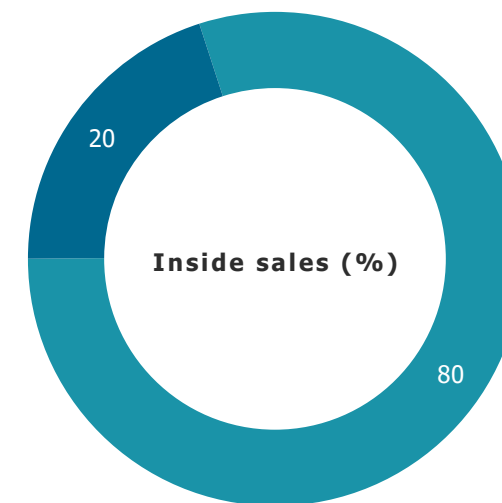
Traditional channels Remote/digital channels



~70-80 percent of B2B decision makers prefer virtual conversations or digital self-service interactions, according to McKinsey.

Share of revenue: inside sales vs. field sales

Increase No change Decrease



63 percent of Fortune 500 executives say they expect their field sales revenue to decrease, while **80 percent** expect their inside/digital sales revenue to increase, according to Boston Consulting Group.

transformation case study

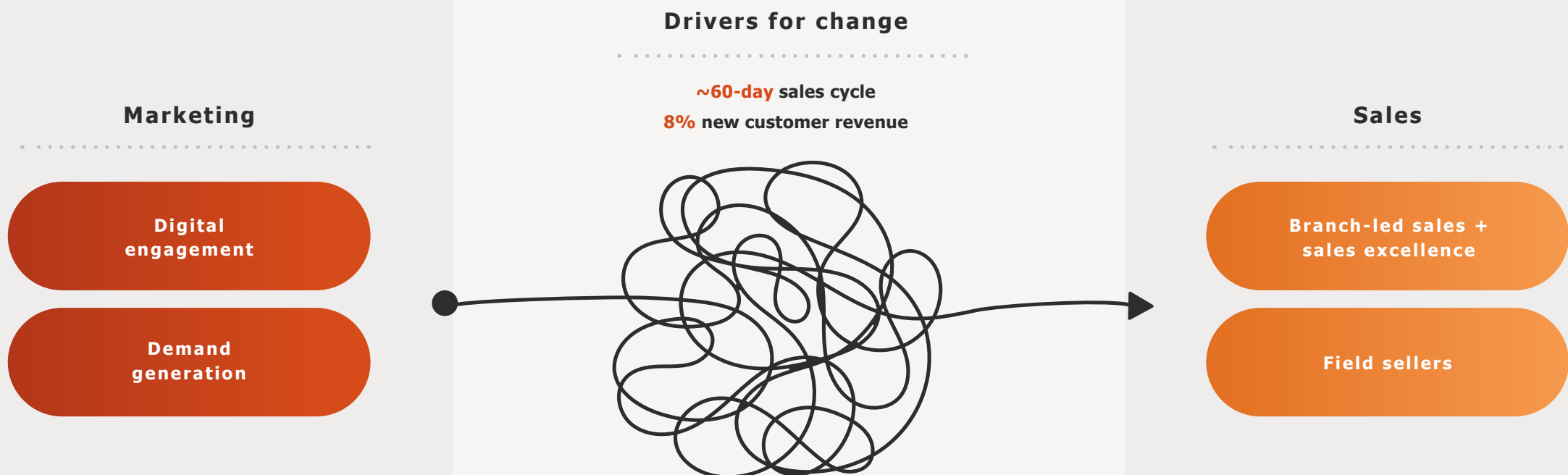
In 2021, we began a **six-month pilot with a product group within a Fortune 500 company to move from a primarily field sales model to a digital-first approach.**

Like so many other revenue teams, they realized they needed to better meet the needs of buyers. That meant moving from the entrenched branch-driven field sales motion to a digital-first strategy.

For years, their field sellers had been taking a free-form, self-led approach to engaging with buyers, most of whom were existing customers. As a result:

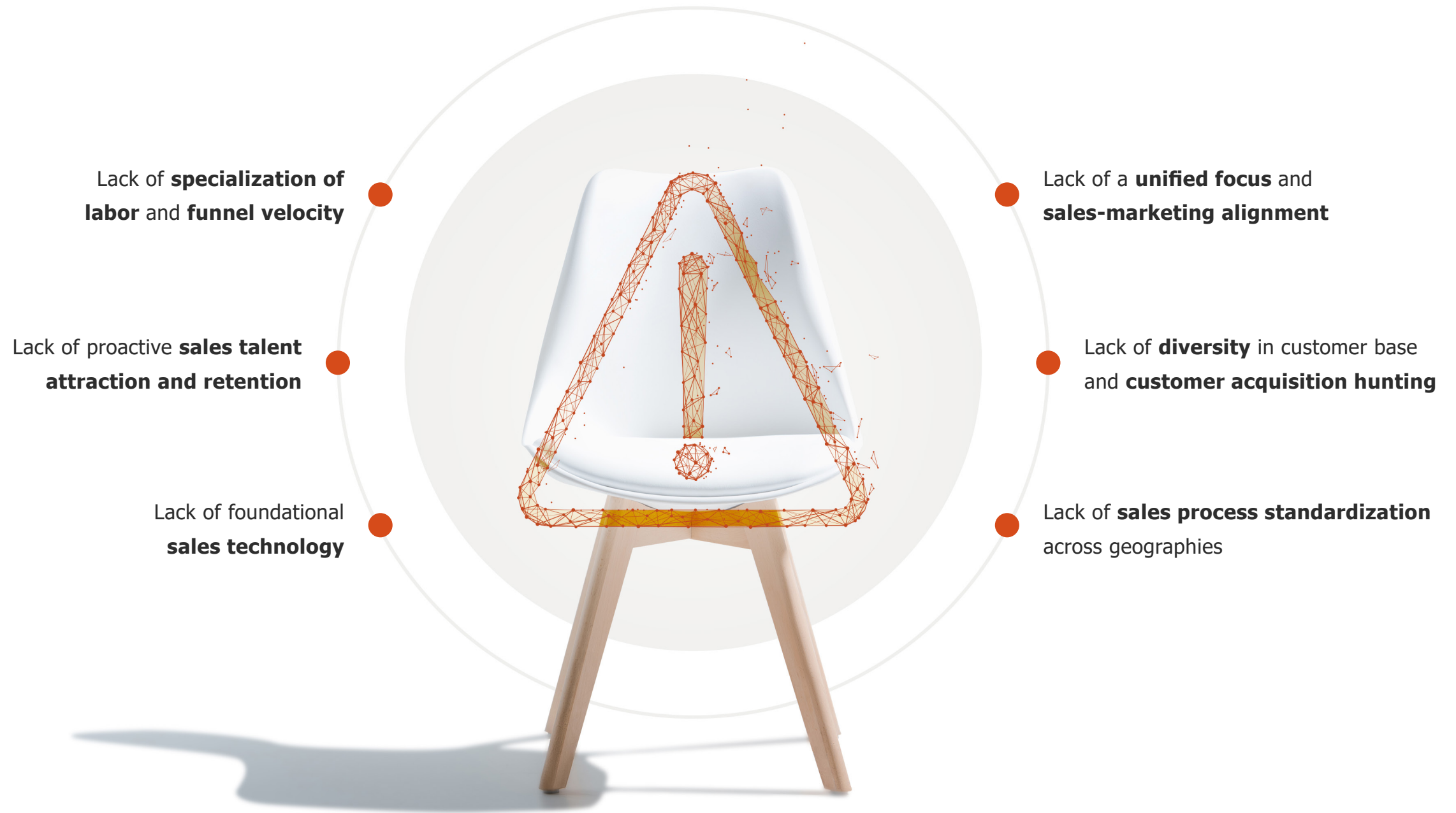
- 90 percent of their revenue came from **20 percent** of their customers
- Only **32 percent** of their customers returned annually
- A mere **eight percent** of their revenue came from new customers
- **31 percent** of their customers were dormant

Their multi-line-of-business portfolio required sellers to be generalists. Sellers also managed their sales process manually, which meant they struggled to find time to focus on bringing in new logos. When they did have time, the process of getting a first meeting, closing, and winning new business felt slow and clunky.



transformation *symptoms*

Underlying the most urgent drivers for change, the organization was showing many of the common symptoms that signal the need for digital transformation.



astonishing results

The company chose a single product offering for a six-month pilot program, and temporarily converted seven sellers to dedicate one-third of their time for digital activities.

After only six months, the organization saw an astonishing lift in activity, pipeline creation, and bookings.

Pilot test conditions

7 inside sellers

1/3rd of their time

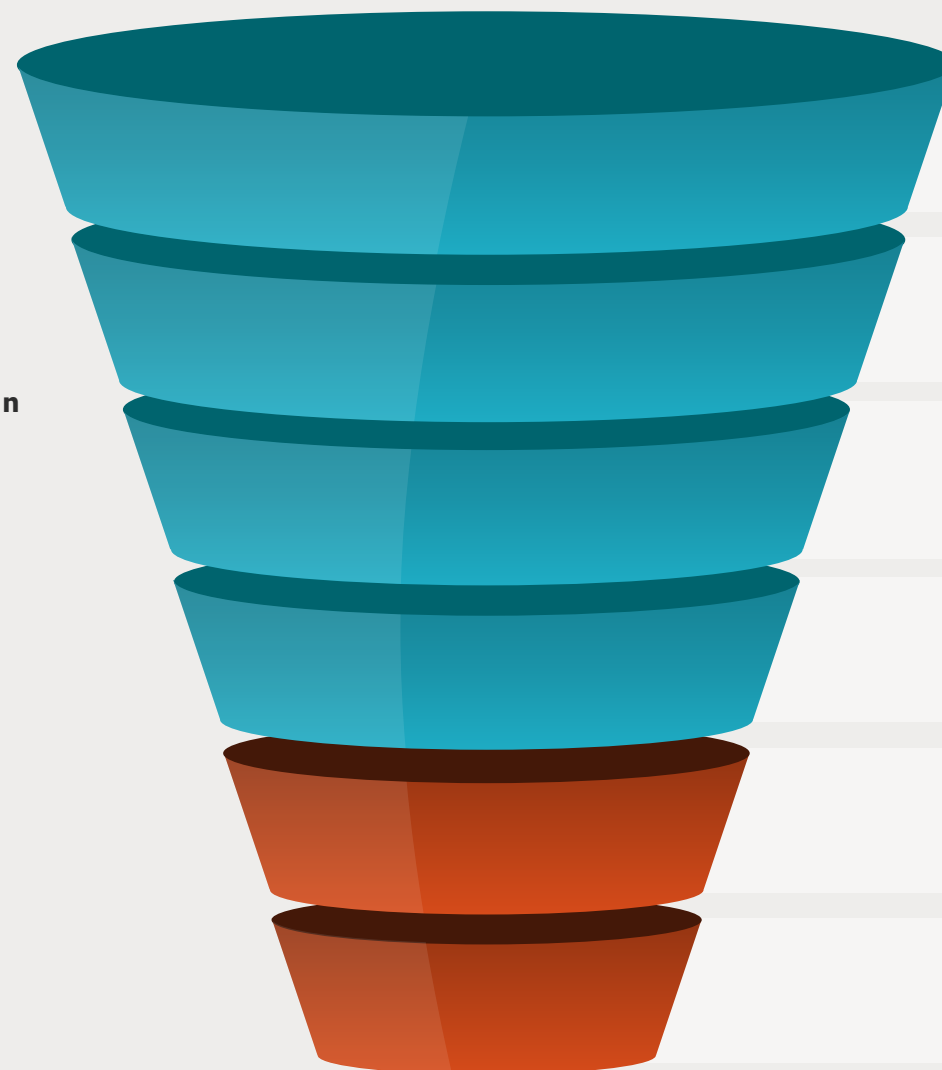
6 months test duration

Pre-test benchmarks

~60-day sales cycle

\$399K total pipeline

\$26K bookings



Pilot test results

2,717 prospects worked

20.6k digital sales activities

2.5k digital sales conversations

125 digital customer meetings

▲ 137 | \$7.5M funnel

▲ 75 | \$1.3M bookings

transform your sales organization for the *digital buyer*

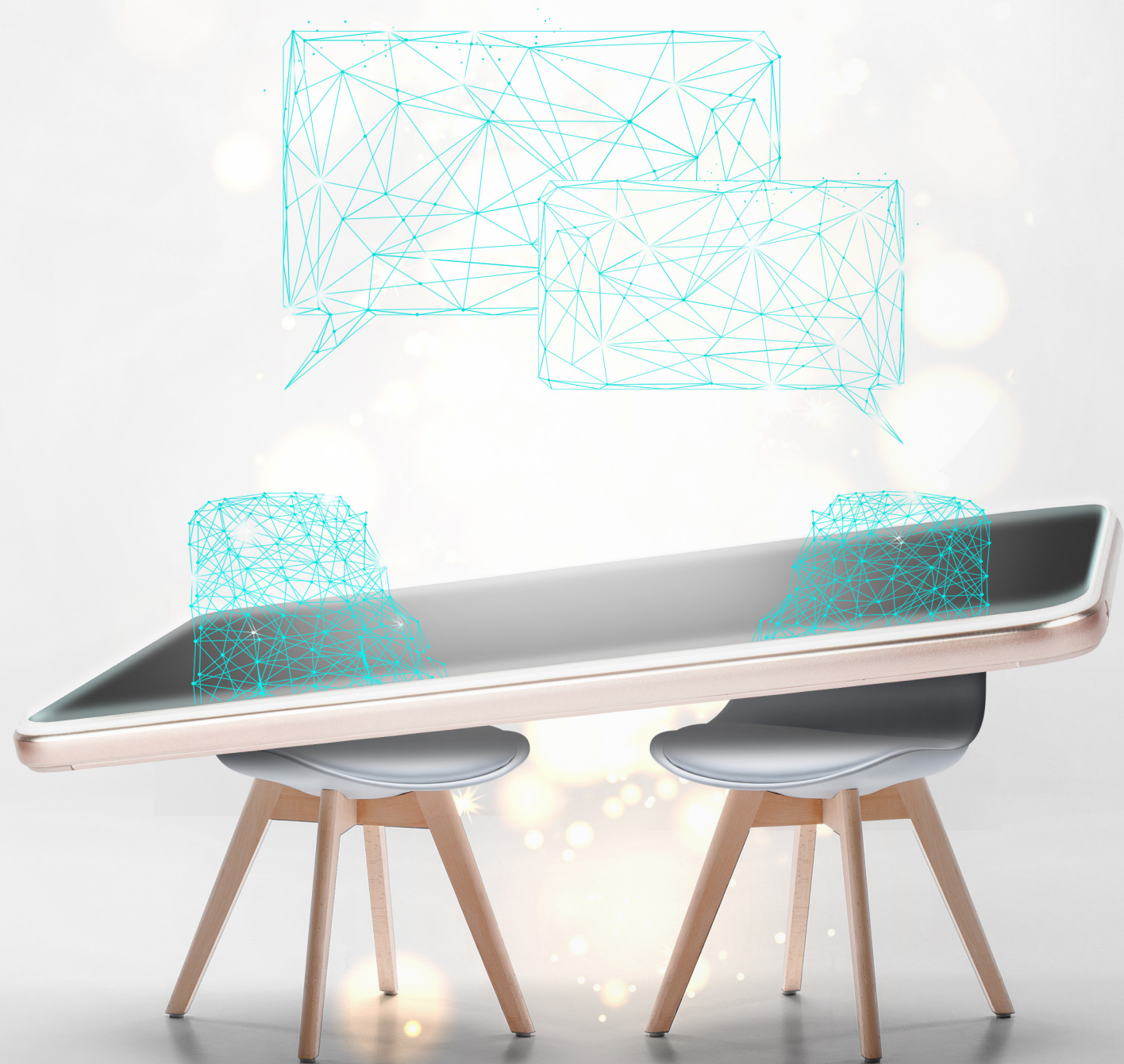
Based on the data and experience with this organization's shift to digital sales, we have identified three key components for successful digital transformation.

► MODERNIZE YOUR INFRASTRUCTURE

► EVOLVE YOUR TEAMS

► ENABLE WINNING CONVERSATIONS

In the following pages, you'll see how to transform your sales organization in each of these areas.



transform your sales organization for the digital buyer

modernize the *infrastructure*



technology is the glue



2,717 prospects, 20,600 activities, 2,500 conversations, and 125 meetings.

How is it possible that only seven sellers, utilizing only one-third of their time, achieved all of that?

The only way to achieve that level of activity is to choose and implement the right technology.

Building the right tech stack can feel overwhelming—there are countless platforms to choose from, all with different features available. When these systems are implemented poorly, teams adopt their own tools, data becomes scattered across too many platforms, and the technology that was meant to improve efficiency only serves to slow it down.

The goal is not to invest in *more* tools, but to intentionally choose the *right* tools to support your goals and then implement them the right way.

In addition to your CRM, here are a few tech stack staples to consider:

- **A prospecting tool** to collect and manage lead and contact data.
- **Sales engagement software** to build and manage automated cadences.
- **Sales enablement software** to organize and support your enablement content.
- **Conversation intelligence software** to provide detailed coaching feedback.
- **A personal video tool** to enable asynchronous video engagement.

With the right tech stack, implemented well, you can realize the power of data-driven insights and automation and your sellers can execute faster and with greater precision.

the case for *automation*

Your lead routing process—getting the lead from marketing to the right seller—is vital for improving response times and maximizing your opportunity with every lead.

The problem is, many organizations struggle with:

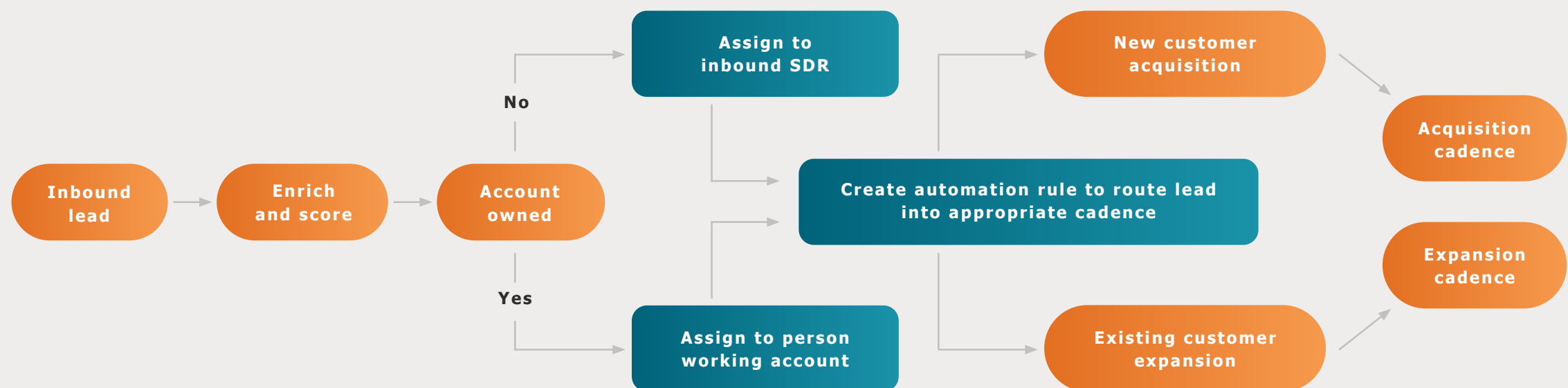
- **Low accuracy** due to routing the lead to the wrong person or queue.
- **Long lag time** in routing a lead to the right person or queue.
- **Leads disappearing** into places where no one is looking.

Most organizations still assume there's a handoff between marketing and sales, and the two teams keep separate goals. Marketing is primarily concerned with demand gen and MQL creation. Sales is focused on lead response and SQL creation.

But buyer behaviors demand a more seamless experience between marketing content and sales conversations. Otherwise, potential opportunities get lost in the gaps, and manual reporting on both sides is unreliable.

That's where automation can help. Building automation rules to route leads can significantly improve your consistency and response times. Processes that would otherwise take someone hours or days to manage manually can potentially happen in seconds.

Sample inbound lead routing process



the need for *analysis*

When leads started coming in during the pilot, the leadership team was surprised at how well those leads converted. But perhaps more surprising was the granularity of the metrics they could track in the newly implemented sales engagement platform. That kind of visibility was previously unheard of.

Unfortunately, a lack of analytics and insights is all too common in B2B sales organizations.

Companies often rely on busy sellers to log their own data in the CRM and then manually build reports based on the inputs. Not only is the manual process overly time consuming, but the data is unreliable at best. Small mistakes and inconsistencies can create big gaps in your reporting dashboards.

By contrast, the digitally automated approach used in this pilot took little to no effort for the sellers.

Sales engagement software provides a range of analytics, including:

- Email opens and response rates
- Call duration and frequency
- Meeting scheduling and attendance
- Pipeline velocity
- Deal conversion rates

When you're running tens or even hundreds of different sales cadences at the same time, you need a sales engagement platform to help manage and measure those conversations. By tracking and analyzing these metrics continually, your digital sales teams can gain valuable insights into how their activities are performing and make data-driven decisions to improve their results.

transform your sales organization for the digital buyer



evolve your teams

one seller *can't do it all*

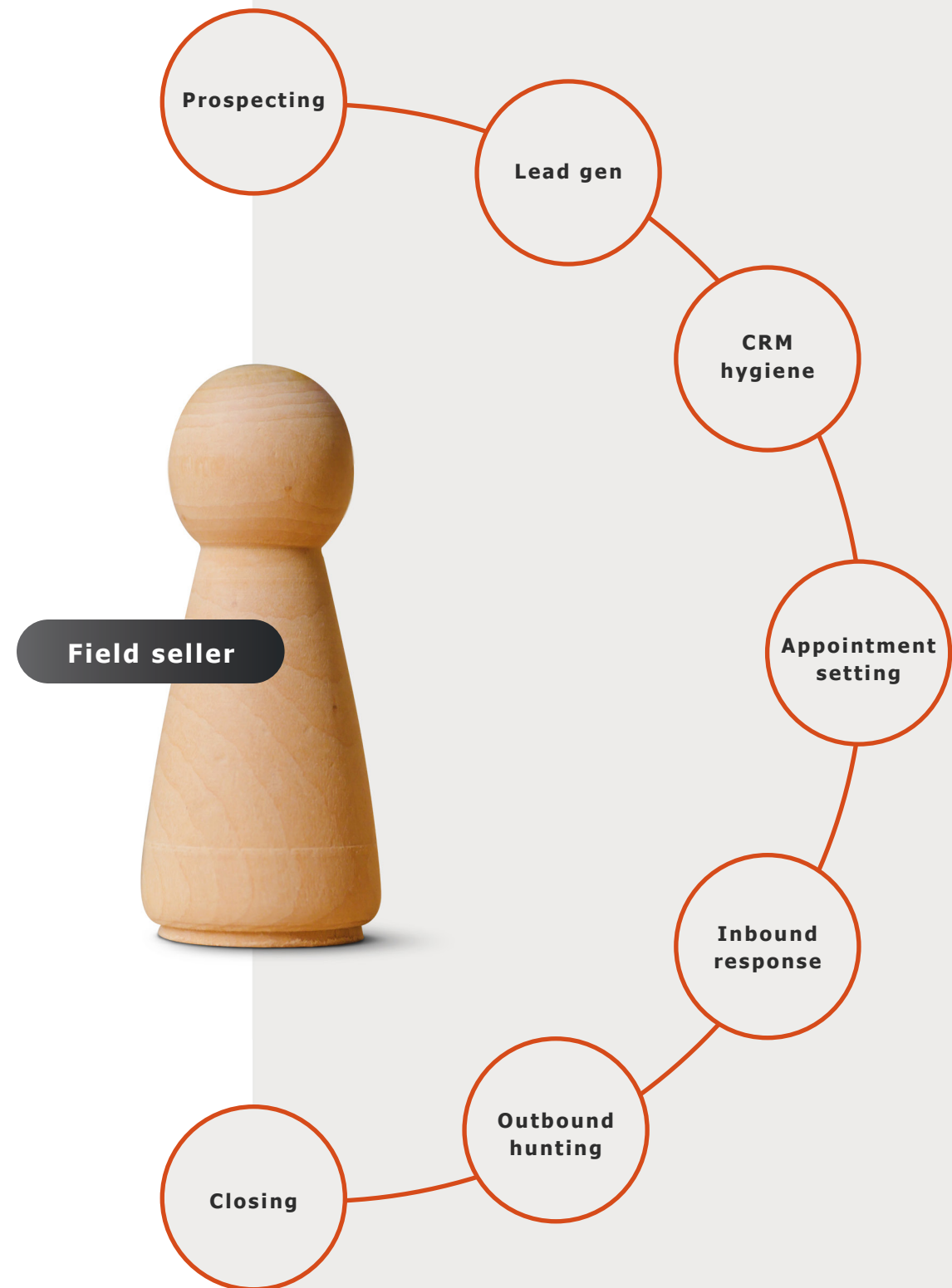
Research from Boston Consulting Group indicates that over the next three years, 63 percent of organizations expect their field sales revenue to decrease, while 80 percent expect their inside/digital sales revenue to increase.

Forward-thinking organizations are giving digital sellers bigger roles and more autonomy to compensate for this shift.

The challenge is that digital selling requires a unique set of skills and competencies—one seller can no longer fulfill every need.

The traditional field seller might have managed every activity—including prospecting, CRM hygiene, appointment setting, inbound response, and closing conversations—all on their own.

But in a digital sales model, many of those activities should be supported by more specialized roles.



specialized *supporting roles*

Your field sellers' time is valuable. So instead of asking them to take on every selling activity, they should be focused on the most valuable tasks.

That means bringing in more specialized talent to manage the supporting activities. In this model:

- **Field sellers** direct the activities of the team and have face-to-face conversations with qualified prospects and customers.
- **PQRs** (pre-qualification rep) are primarily responsible for lead cleansing, CRM hygiene, and gathering intelligence on leads.
- **SDRs** (sales development rep) respond to inbound leads and qualify them for sales conversations.
- **BDRs** (business development rep) are outbound-focused, hunting for new opportunities and qualifying them for sales conversations.
- **Inside sellers** conduct virtual conversations with qualified prospects and customers.

Every role on the team is vital, and they all have different skills and strengths.



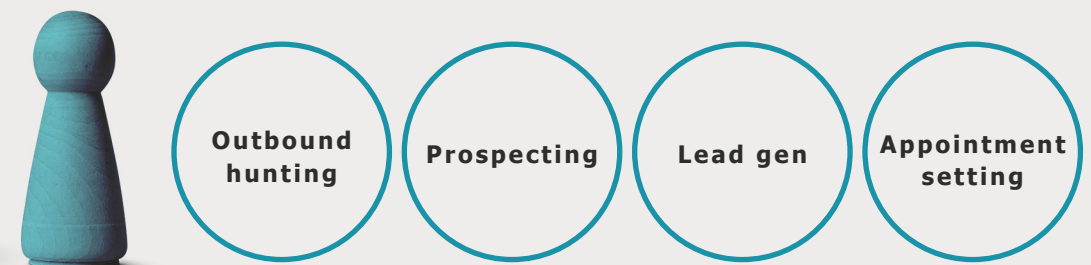
PQR (pre-qualification rep)



SDR (sales development rep)



BDR (business development rep)

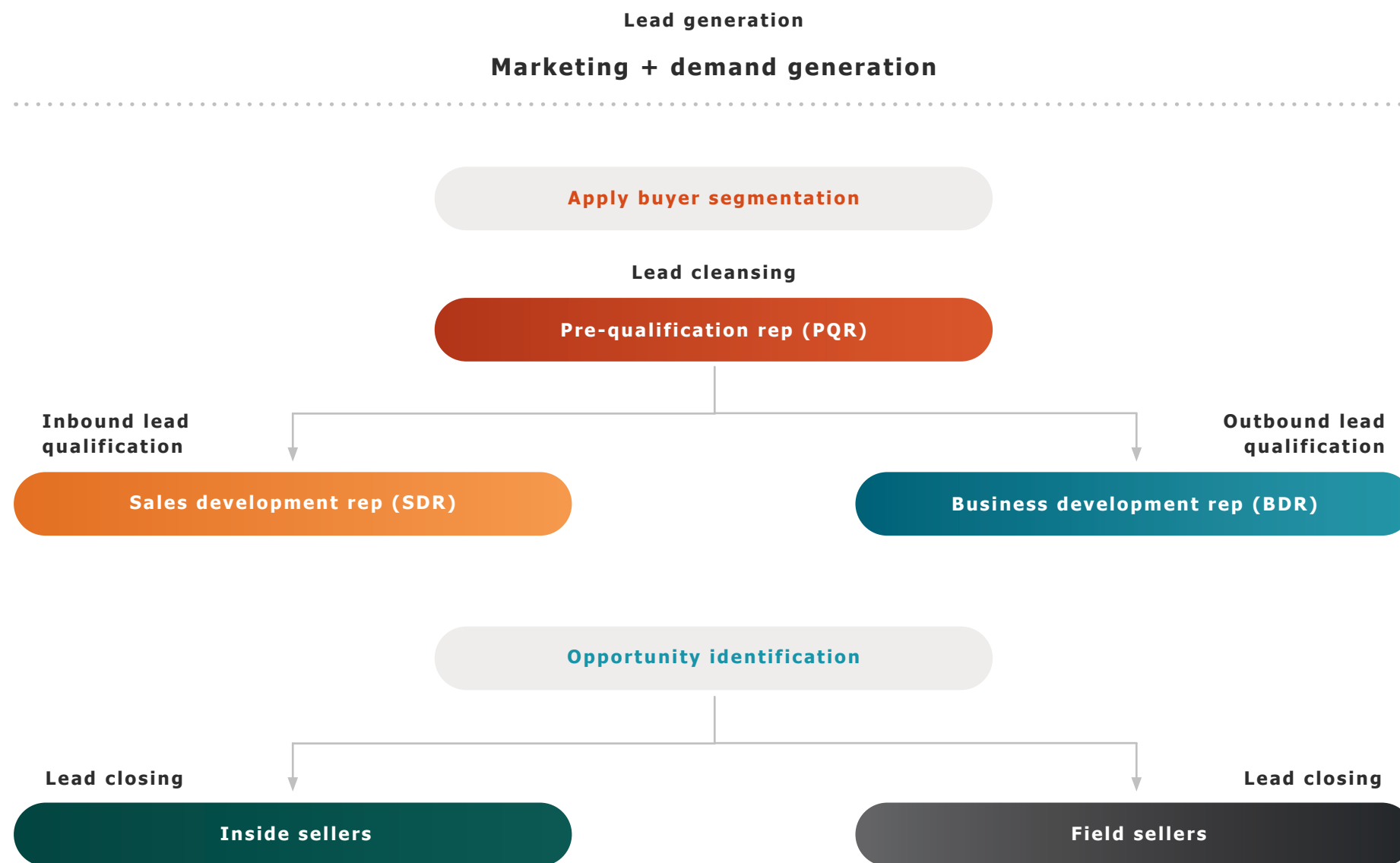


Inside seller



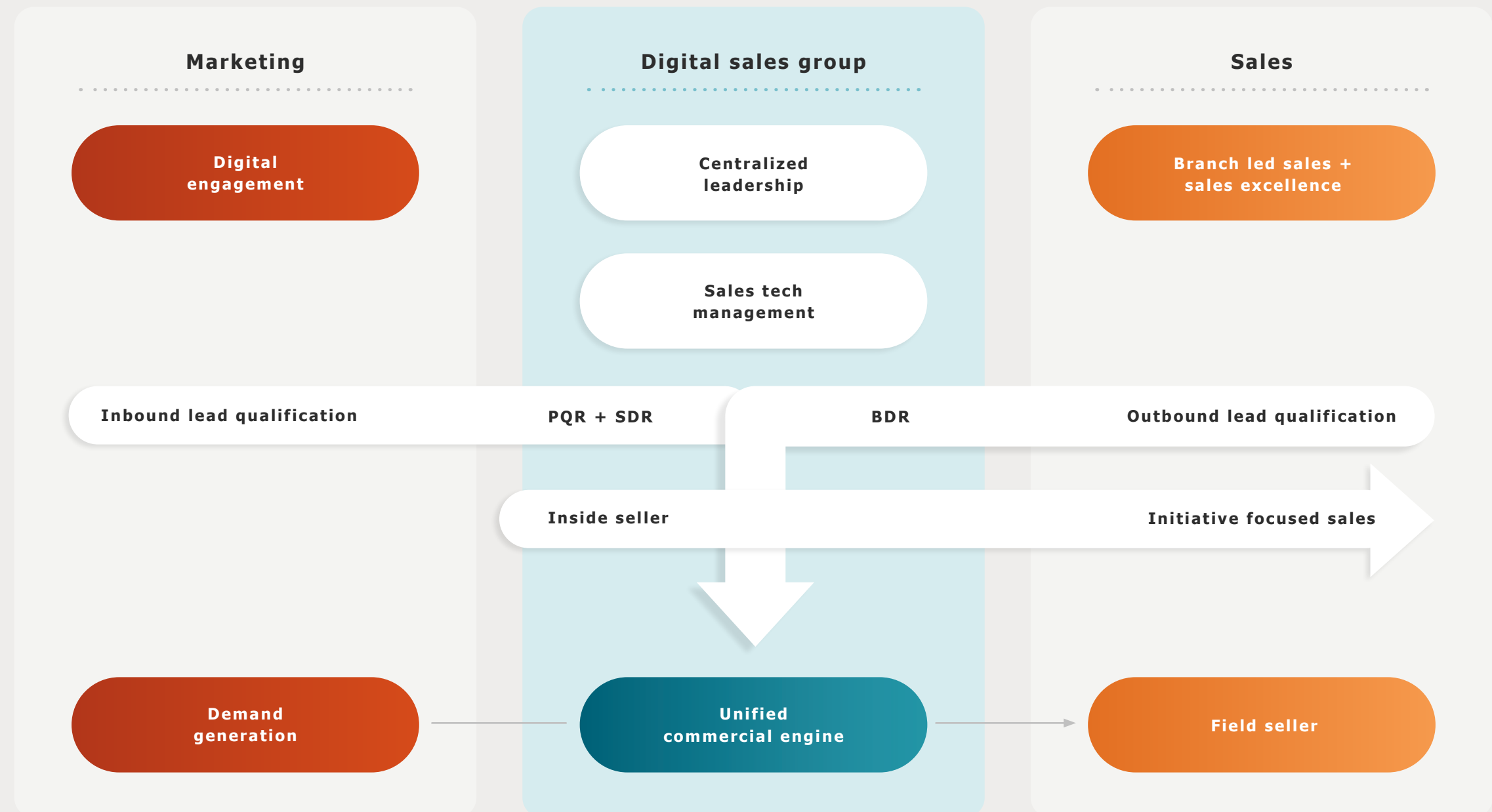
digital sales team *structure*

Here's how all your digital sales roles work together, alongside marketing and demand gen, through the sales process.



a *unified* commercial engine

At the beginning of the pilot, marketing and sales were working in silos. But the new digital sales group acts as an essential bridge—bringing centralized leadership, processes, and tech management to unify the commercial engine.



transform your sales organization for the digital buyer

enable winning *conversations*



creating your *cadences*











To get a digital buyer engaged with your sellers, you need a proactive way to begin and sustain that conversation. That's where sales cadences come in.

A sales cadence is a personalized series of touchpoints that sellers can use to reach prospects through emails, phone calls, and social media interactions.






Different cadences have different goals. Your SDRs can run a “get a meeting” cadence to get inbound leads interested in meeting with your sellers. Your BDRs can run outbound cadences to qualified prospects to drive engagement. You can also run cross-sell or upsell cadences to existing customers.

In every case, the cadence includes tailored messages, content, and call scripts that speak to your buyer’s situation and sparks interest in your solution.

“Get a meeting” cadence

-  **Step 1 | Day 1:** LinkedIn Research
-  **Step 2 | Day 1:** LinkedIn: connection with note
-  **Step 3 | Day 3:** Email #1
-  **Step 4 | Day 3:** Call with voicemail
-  **Step 5 | Day 5:** Call without voicemail
-  **Step 6 | Day 7:** Email #2: first content asset
-  **Step 7 | Day 10:** Call without voicemail
-  **Step 8 | Day 11:** Call without voicemail
-  **Step 9 | Day 14:** LinkedIn: profile view
-  **Step 10 | Day 16:** LinkedIn: message or InMail
-  **Step 11 | Day 20:** Email #3: second content asset
-  **Step 12 | Day 25:** Call without voicemail
-  **Step 13 | Day 30:** Call with voicemail
-  **Step 14 | Day 31:** Email #4

A cadence is the series of actions you take in a sales motion with a prospect or customer. Every cadence consists of these five parts:

-  • **Attempts:** Total number of touches
-  • **Channels:** Types of communication methods used
-  • **Spacing:** Timing of the touches
-  • **Content:** Messages, content, and scripts for each touch
-  • **Duration:** Total length of the sequence

persistence pays off

In a recent field trial, we found that **3.5x more opportunities were created after the sixth touch in a "get a meeting" cadence.**

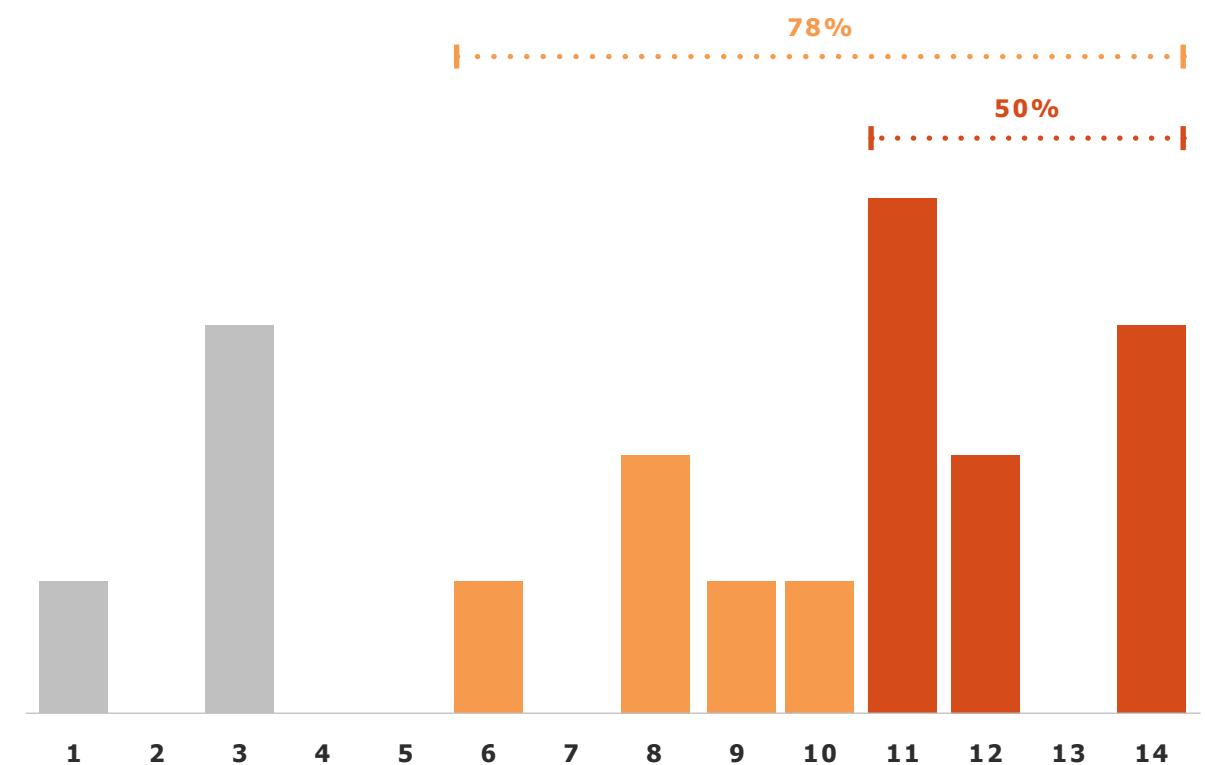
Out of 18 total opportunities, 14 of them (78 percent) were created after step six, and nine of them (50 percent) were created after step 11.

Clearly, sellers can't give up after only a handful of emails and phone calls.

Longer cadences with more attempts will get you exponentially more opportunities. But what you choose to include in your cadences can change your results. You also need to send the right messages and the right content at the right time.

Total opportunities by cadence step

■ Steps 1-5 ■ Steps 6-10 ■ Steps 11-14



In a recent field trial, we found that longer cadences led to more opportunities. 78 percent of opportunities were created after step six, and 50 percent were created after step 11.

using the right content

Each step within a cadence includes messages, content, and call scripts to guide the seller on what conversation needs to happen and when. That means your sellers can deliver more touches in less time, without having to think about which message to use, what content to include, or how they should deliver them.

How will your choice of content affect your results?

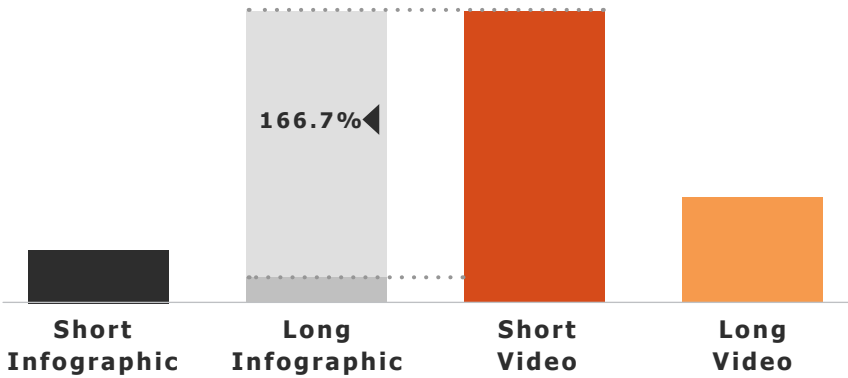
In the field trial mentioned on the previous page, **we tested four different combinations of content:**

- 1. **Short infographic first**, followed by a short video
- 2. **Long infographic first**, followed by a long video
- 3. **Short video first**, followed by a short infographic
- 4. **Long video first**, followed by a long infographic

Results show that prospects who received the video first booked more meetings than those who received the infographic first. And the shorter versions of the content assets led to significantly more meetings.

In fact, **64 percent of all opportunities** resulted from prospects who received a short video first, followed by the short infographic.

Opportunities created by group



Prospects who received a short video first, followed by a short infographic, booked significantly more meetings than other groups in a recent field trial.

Opportunities created by cadence step

Step	Short Infographic	Long Infographic	Short Video	Long Video
1. LinkedIn Research			5%	
2. LinkedIn: connection with note				
3. Email	5%		5%	12%
4. Call with voicemail				
5. Call without voicemail				
6. Email: first content asset			5%	
7. Call without voicemail				
8. Call without voicemail		5%	5%	5%
9. LinkedIn: profile view			5%	
10. LinkedIn: message or InMail			5%	
11. Email: second content asset			22%	
12. Call without voicemail			15%	
13. Call with voicemail				
14. Email	5%		5%	11%

83 percent of all opportunities were created when a video was sent first.

win the *virtual presentation*

Once you get your buyer's attention, build their interest, and book the meeting, it's time for your sellers to deliver a memorable and persuasive sales presentation.

That can be a challenge in a virtual setting. Your buyers can get distracted by their surroundings. Your presence is a tiny image in the corner of their computer screen.

Your sales deck is now the most visible and visual part of your audience's experience. Which means your story and your slides are the focus of attention—or not, depending on how well they do the job.

According to our ongoing research, your virtual sellers need to:

- **Introduce compelling insights**, backed by data, that show your buyer why they need to change from their status quo.
- **Identify one main message** you want your buyer to remember and repeat that message often throughout your presentation.
- **Include a lot of animation and movement** on your slides to draw attention to specific information at the right time.
- **Draw on your slides** like a virtual whiteboard to keep your audience engaged as you talk through the information.

With these techniques and others, your virtual sellers will be better equipped to convert the leads your SDRs and BDRs bring in.

building persuasive presentations



Dr. Carmen Simon

Cognitive Neuroscientist
and Chief Science Officer

When your buyer attends your sales presentation, they often have a goal in mind. They need to solve a business challenge, and they hope you can provide a solution.

As they watch your presentation, they're trying to understand what your solution offers, and how it applies to their situation.

Your buyers can and will pay attention if the information is stimulating and rewarding. But will they remember it when they decide to buy? And will your message affect that decision?

Building and delivering a persuasive virtual sales presentation requires more than just winning attention.

From a neuroscience perspective, it means focusing your buyer's attention on the right information, building precise memories in their mind, and ultimately persuading them to take action in your favor.

transform your sales organization for the *digital buyer*

Buyers want and prefer digital buying experiences. But most sales organizations don't know where to start in their digital transformation journey.

This Fortune 500 company provides a prime example of how you can successfully navigate the change. When you move from primarily field selling to a digital selling model, you too can see better alignment across your commercial teams, higher conversion rates, more revenue, and greater efficiency overall.

► MODERNIZE YOUR INFRASTRUCTURE

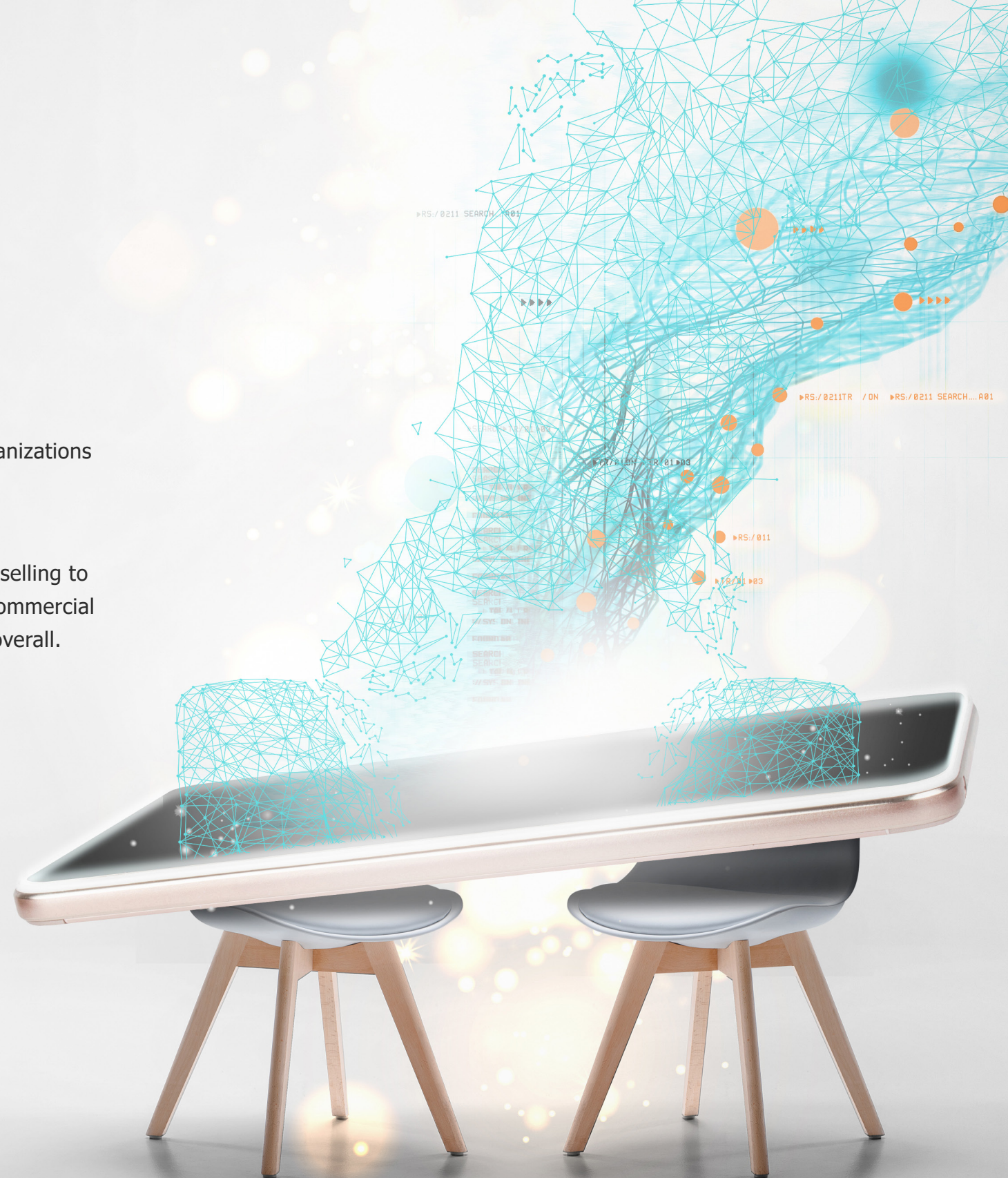
Create a tech stack that emphasizes automation, supports robust performance reporting, and standardizes as many processes as possible.

► EVOLVE YOUR TEAMS

Hire and develop specialized digital talent, build an organizational structure that supports digital-first selling, and align all your commercial teams.

► ENABLE WINNING CONVERSATIONS

Equip your teams with digital selling skills, content, and cadences that spark productive sales conversations through digital channels.



about Corporate Visions

Corporate Visions the leading provider of science-backed revenue growth services for sales, marketing, and customer success. Global B2B companies work with Corporate Visions to articulate value and promote growth in three ways:

- **Make Value Situational** by distinguishing your commercial programs between customer acquisition, retention, and expansion.
- **Make Value Specific** by creating and delivering customer conversations that communicate concrete value, change behavior, and motivate buying decisions.
- **Make Value Systematic** by equipping your commercial engine to deliver consistent and persistent touches across the entire Customer Deciding Journey.

Only with Corporate Visions will your revenue teams get science-backed training to articulate value in every critical conversation with prospects and customers.

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Frank Pinder is the EVP of Digital Transformation Services at Corporate Visions. He has created a field testing methodology and framework that have improved inside sales teams' performance around the globe. Frank has extensive experience working with small and large organizations alike to provide top-notch testing environments directly linked to business growth and overall success.

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