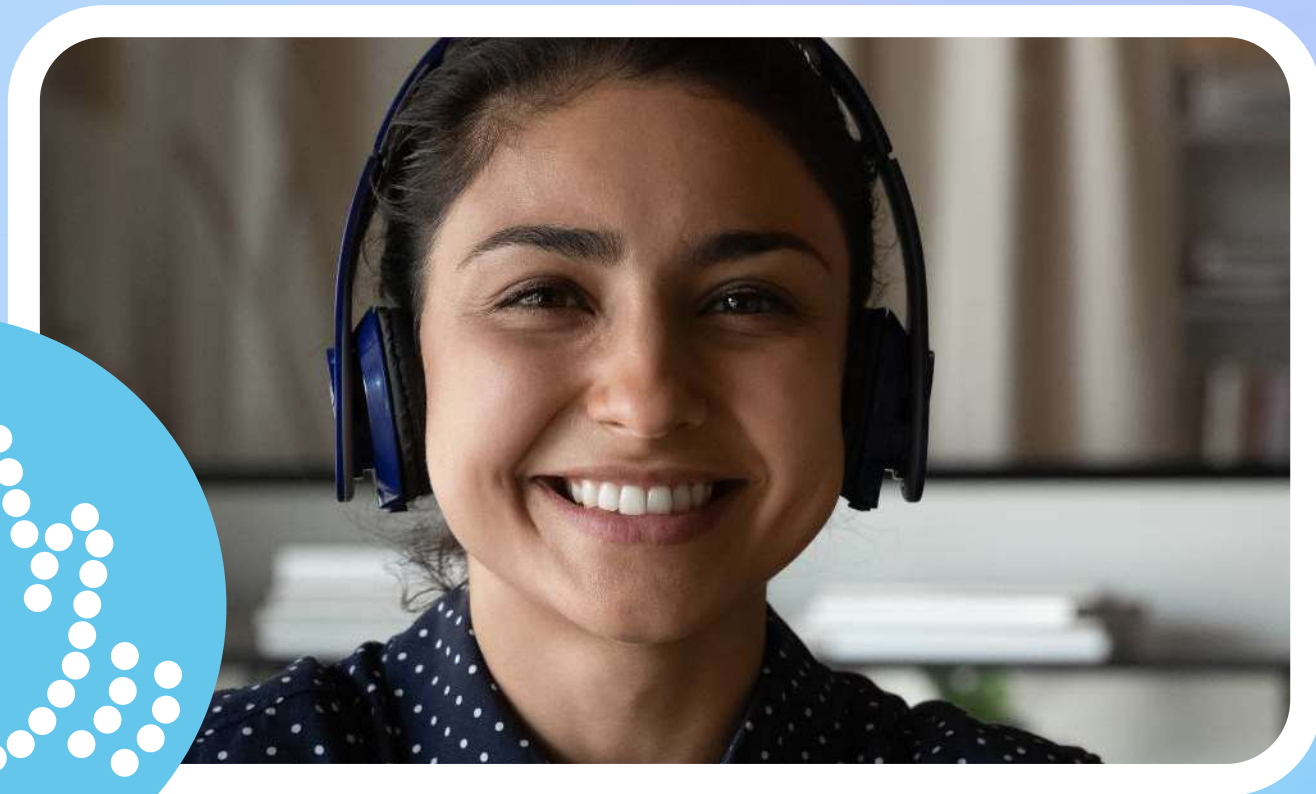


BOTS



SCALE

HUMANS



SELL

The art and science
of digital-first selling



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Foreword

“All selling organizations need automation, AI, and chatbots. But most importantly, you need people.” Sean Whiteley co-founder, Qualified.

Sales teams have persevered through, and thrived out of economic crises, pandemics, and adjusted to seismic shifts in buyer behavior. [Following 2020, 58% of sales reps expect their jobs to change permanently.](#)

This book outlines the plethora of sales technology available, a reps’ new role with buyers, and ways to optimize this new way to work while putting people (their experiences) and customer success first.

What You’ll Learn in this Book

- ◆ The sales tech boom: sales tools have never been more plentiful: understand how to find the right tools for your stack.
- ◆ The importance of chatbots: chatbots are a fundamental game changer for your sales’ teams productivity.
- ◆ The importance of delivering a human (and customer) centric sales experience.

CHAPTER 1

THE LASTING IMPACT OF THE SALES TECH BOOM

Gartner expects 80% of B2B selling to occur in digital channels by 2025. That said, organizations need to invest in the right tools, right now. An account executive's (AE) tech stack is critical to their job, and luckily, there's no shortage of tools that help generate pipeline, accelerate deals, analyze data, or help solve problems faster for customers.

80%

of B2B selling will occur in digital channels by 2025

Gartner

It's critical that sales leaders implement solutions that are beloved by their teams and that integrate with existing systems. According to [Gartner](#), the number one factor for successful sales technology is rep adoption versus tools that suit the needs of management.



CHAPTER 1 RECAP

Sales technology are applications and software used by sales professionals to make their job easier. Digital-selling is the future, but the key to success is rep adoption.

Sales technology makes selling easier...right?

CHAPTER 2

SALES TECH MAYHEM

There's always a 'but,' isn't there?

With the wealth of technology readily available, “many of the sales enablement, sales, and operations leaders we talk to cannot name all the [technology] solutions in their portfolio or explain how they are improving selling outcomes,” writes [Stephen Diorio](#), leadership strategist.



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In addition to Salesforce, I have about six tools in my holster that should help me build my qualified pipeline and accelerate my deal cycles. The problem is, I don't know what to use when!

Lindsey Benninger, Account Executive



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This problem is all too common. Sellers can automate their tasks and analyze their communications, but that doesn't always mean it's done correctly or adds efficiency to their days. Most things can be automated in our lives, yet those activities still require a nice dose of human judgment every now and again.

Technology should help humans be the best at our jobs; not hamstring deals, delay signatures, or throw wrenches into a sales cycle.

Selling can be a science, but it's imperative to prioritize real-time human connections.



CHAPTER 2 RECAP

A salesperson's tech stack should make them more efficient, but oftentimes there's tool-overload and reps spend more time figuring out their tools than closing a deal.

THE ROLE OF A CHATBOT



Salesforce's [State of Sales: Fourth Edition](#) clearly states that leaders who invest in tools win when they *increase* headcount. **Technology is additive to the role of a rep, not a replacement for a human in the seat.**

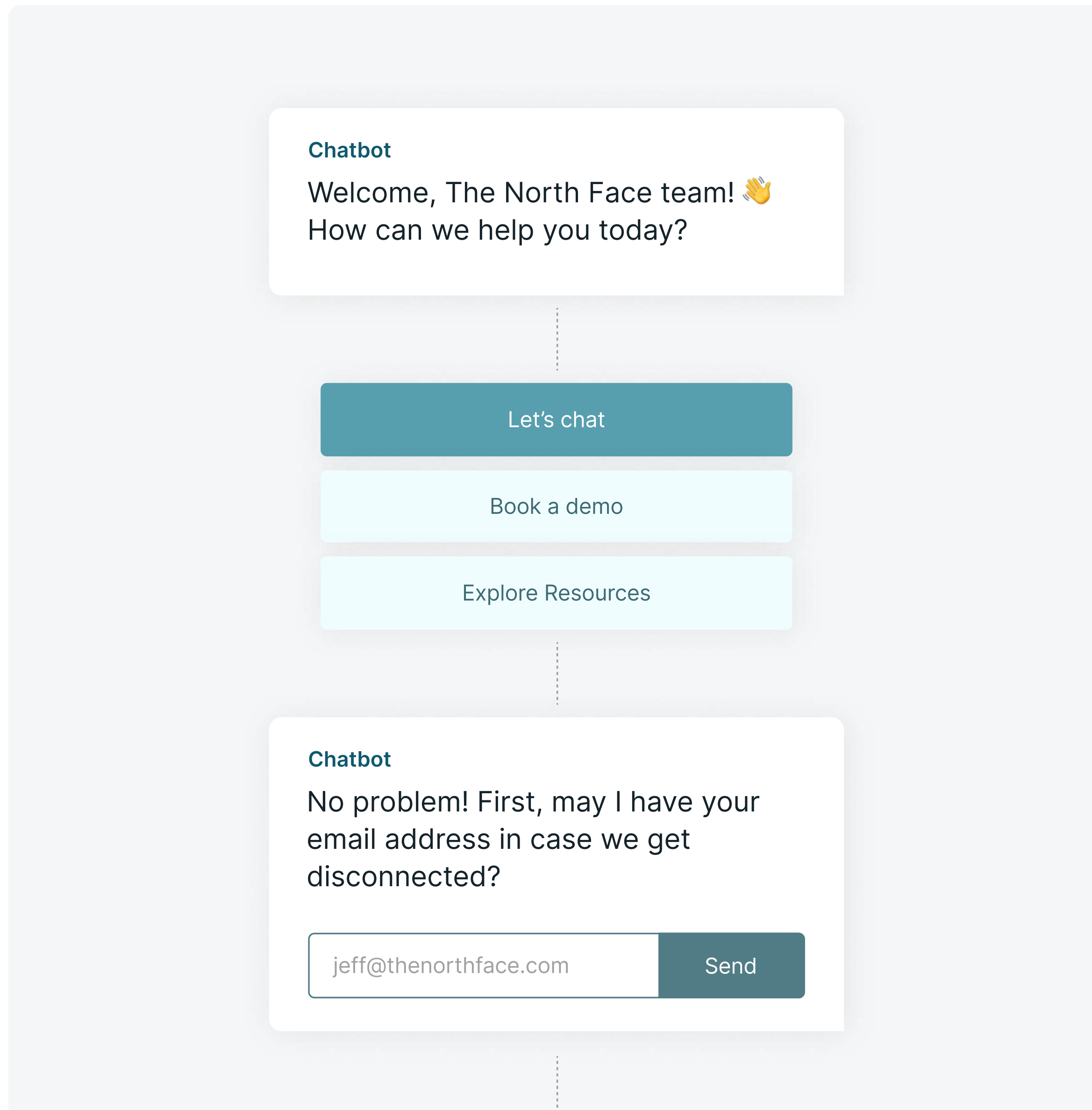
Arming sales teams with tools that make them more efficient and effective is absolutely imperative. According to Diorio, sellers using these tools can then “build buyer empathy, share more compelling content, ask smarter questions, and have conversations that build trust, communicate the financial value of their solutions, and reveal the nuanced differences between their competitors” when they have their discovery call or presentation.

We've all learned a universal truth in the shift to digital-first selling: nothing holds more power or value than a real-time conversation.

The most effective sales tools in a stack should help a rep understand a buyer's intent, glean insights into the buyer's position, and reveal information about a buyer that can help humans connect over a solution that works best for their business.

We know that buying behavior has changed—it's time our sales practices help our sellers meet buyers where they are, and map to their expectations.

Meet a chatbot. A chatbot is a computer program that processes conversations between a human and a computer. In the world of B2B selling, chatbots help make a corporate website more intelligent and can intelligently qualify sales opportunities when placed on high-intent or high-traffic pages.



With a smarter website comes a more efficient sales team. Chatbots proactively qualify potential customers and ensure their visit to your page is well worth their, and your sales rep's, time.

You should always build your chatbot experiences through the lens of human interaction. [82% of buyers](#) state they're willing to engage with a chatbot if it means eventually getting to a live interaction. If someone is coming to your site, the chatbot experience should provide contextually relevant information for the buyer who's visiting

82%

of buyers state they're willing to engage with a chatbot if it means eventually getting to a live interaction

nojitter

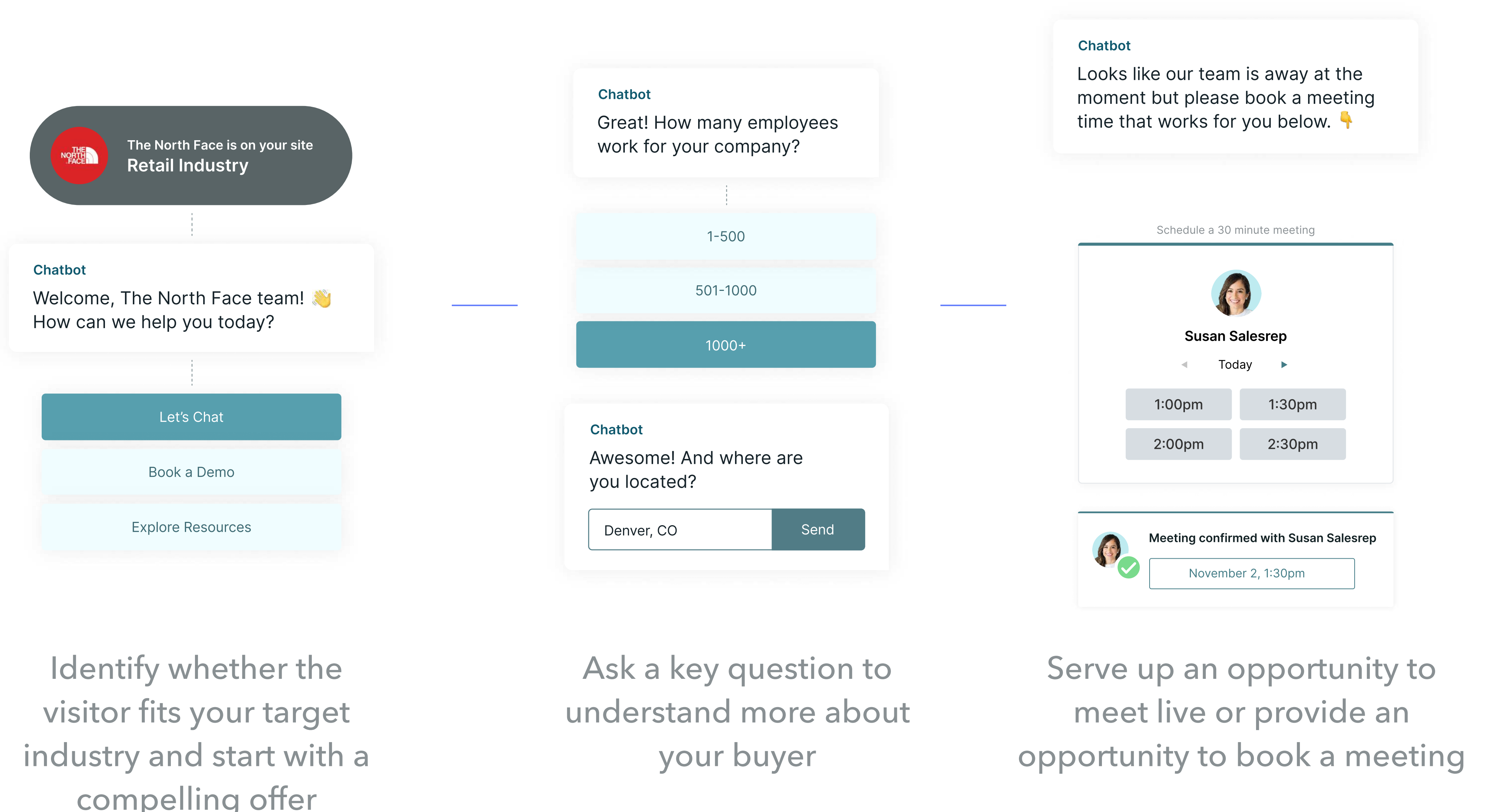
that time. Given the deep bench of sales tool technology at our fingertips, this is easily achievable. Chatbots should identify the [ideal inbound customer](#).

Pro tip!

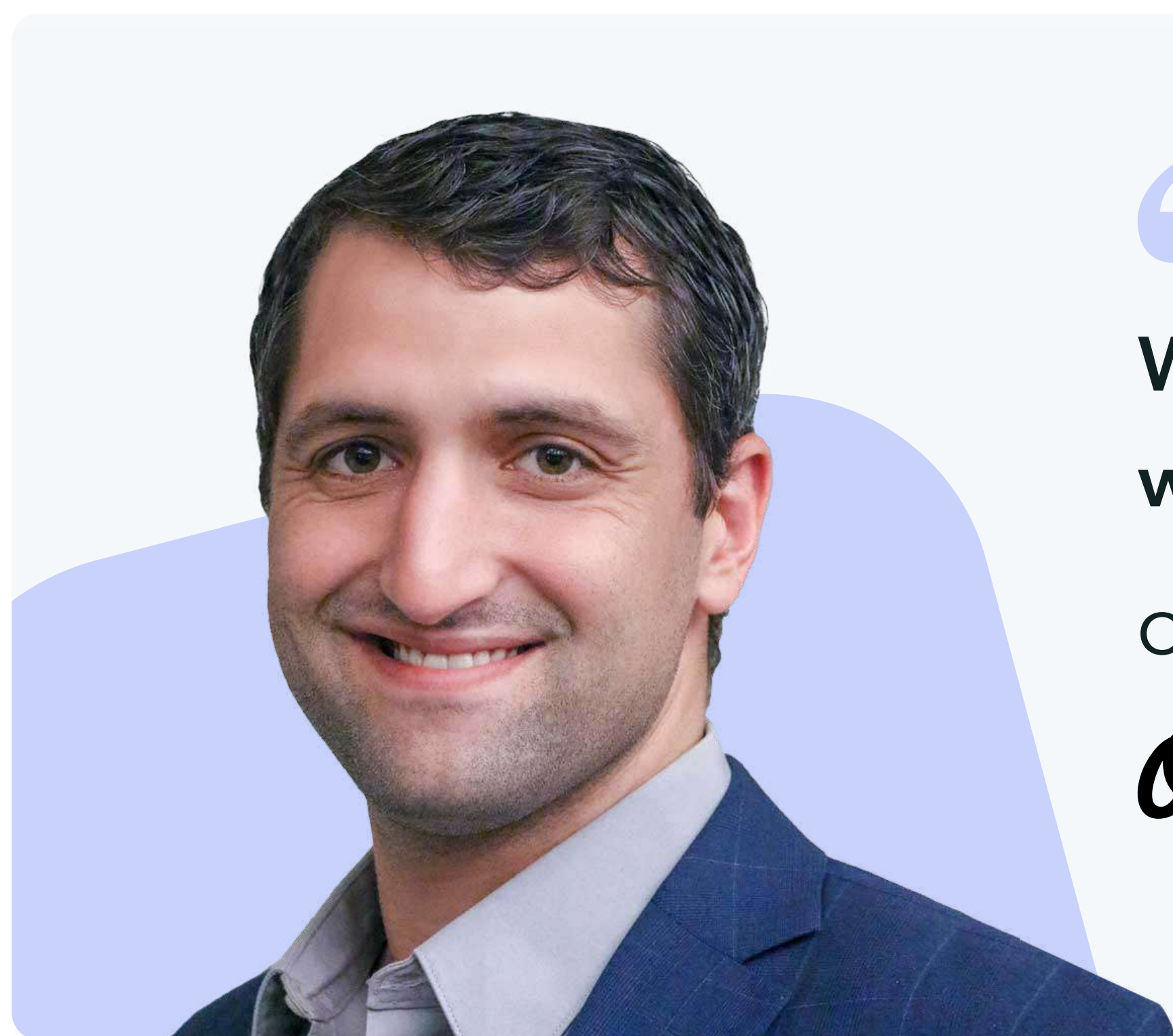
Understanding buying intent is critical to a successful chatbot program. Buying intent data serves as a critical foundation for a personalized buying experience.

Understanding buyer intent is one of the most important components to a successful chatbot experience. If you know what stage your buyer is in, you can automatically serve up content or opportunities to book a meeting to have a live conversation. The options are endless. Leading organizational consulting firm, [Korn Ferry](#), saw a 60% increase in web conversions and drove nearly \$4M in revenue... with a few simple chatbot experiences positioned on high-intent and high-traffic pages.

Build your chatbot experience



Voila! You just used a chatbot to qualify a customer nearly instantly—this can usually take 2-3 rounds of email and calendaring between a prospect and sales team. In other words, you've avoided a prolonged sales cycle.



“

Within months of putting chatbots on our site, we generated \$6M in pipeline. Always-on sales!

Ori Yankelev, Chief Revenue Officer

Own{backup}

The chatbot has done its job (and saved your seller time). Chatbots scale your business by delivering qualified opportunities straight to your sellers to engage with people who are in-market and ready to take the next step. The basics of a chatbot are simple: they engage website visitors, identify buyers, and can help convert website traffic into pipeline.



CHAPTER 3 RECAP

A chatbot is an excellent way to qualify prospects around the clock before a buyer connects live with a sales team.

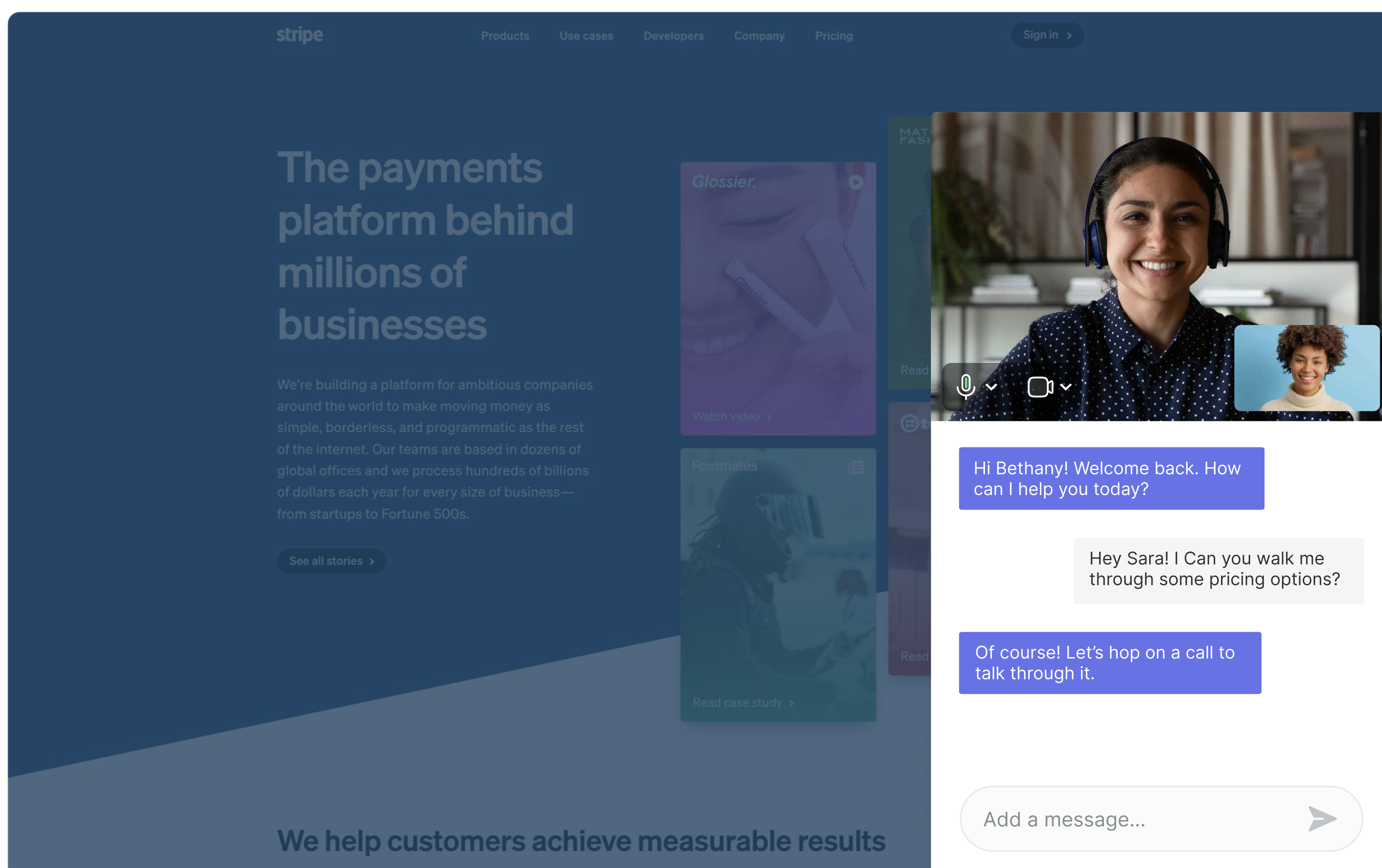
What a chatbot can't do, though, is understand the nuance of a deal cycle.



THE IMPORTANCE OF HUMAN EXPERIENCE



There is no arguing that when executed strategically, chatbots serve up more qualified opportunities to your sales teams. Scott Holden, CMO of Thoughtspot, saw a [10x increase in conversations](#) when his team implemented a chat experience on their corporate website. Buying intent from first-party website data paired with the data gleaned from a chatbot experience sets your seller up perfectly going into a first call with a prospect.



But even in this world of tools that help reps streamline processes and automate tasks, the human-to-human interactions and conversations simply can't be wholly replaced by bots. Leading B2B marketing expert opines, "humans crave connections and relationships with other humans." In the most automated of sales cycles, the most persuasive conversations occur live, on Zoom (or over the phone).

Sales reps are brand ambassadors—they sell with the values of your organization at the front, and are often the first-line of defense for questions about competitors and product features. Reps embody the personality of your brand, answering nuanced questions for buyers.

Of course, there's a homerun happy medium between humans and chatbots—and it comes down to how your organization implements them.

How to Build Human-Centric Conversational Experiences

STEP 1

Create Hot Routes

We know that chatbots are important because they can streamline getting qualified leads in front of your sales team. But did you know that you can architect your experiences to proactively kick off a conversation with a VIP? When a Target Account visits your website, configure custom routing rules to create an experience that “hot routes” a conversation directly to the account owner—ensuring a personal, contextualized, and helpful opportunity for conversation while you have your buyer's attention. Talk about a red carpet buying experience!

Hot Route

Create a custom routing rules to match visitors based on certain filter criteria that we know about them such as: Location, Target Account Information, Salesforce Ownership, and Data enrichment information provided



“

(Our) Qualified implementation manages incredibly complex routing rules based on unique data like business segment, employee count, multi-language Experiences, and regional requirements.

Web Marketing Director

 **Matterport**

STEP 2

Pursue the Perfect Conversation

The perfect sales conversation is hard to define, but there are certainly some tried-and-true tactics that fit the needs of today's buyer.

How to Perfect a Sales Conversation

1. It starts with personalization. Make sure your reps understand their buyer, where they're from, went to school, or are interested in. By knowing this information, they can tee up a friendly wager about a big game or engage in a conversation about their hometown pride.
2. Understand your buyer's digital body language. 3rd and 1st party data can paint a picture of what your buyer wants, when, and why. It's critical to understand why they visit specific pages, spend time on high-intent pages, and scroll through your website's terms of service.
3. If your reps are armed with the information from steps 1 or 2, it's a slam dunk opportunity for a sales conversation when they visit your website. You've already set up "hot routes" to get VIP visitors to sellers upon website arrival. Now, sellers have the chance to kick off a personalized, high-touch experience.

4. As the buyer gets engaged in the conversation, the seller can upgrade the chat to a phone call or video right on your website. If the buyer doesn't have the time right now, they can also use a meeting booker to get a calendar hold for a time that works later, better.

This is the anatomy of the perfect sales conversation—a strategy that leads to a 30% conversion rate from opportunity to stage one to crush your pipeline goals.

Dan Cordisco, director of sales at Qualified, has implemented chatbots to drive his team's pipeline. Yet, he understands that there are nuances of buyer's needs that cannot be digested by a chatbot. In the end, Dan's team's product expertise and account management skills are what closes the deal.

“

We're living through a seismic shift where the power has transitioned from vendor to buyer. It's a seller's responsibility to articulate and provide a powerful solution to any customer's problem.

Dan Cordisco, VP Sales



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Like the [State of Sales: Fourth Edition](#) from Salesforce says, technology requires more human horsepower than not. It's absolutely critical to have a sales conversation, human to human, where a seller articulates the solutions their product can help the provider.



CHAPTER 4 RECAP

Implementing chatbots is a great strategy to tee up your sales team with qualified pipeline. Building chatbots with the intention to lead to a human experience is paramount for a successful program.

Now imagine a world where your website harnesses the power of a buying intent, chatbots, and is equipped with a platform that identifies visitors, segments traffic, and facilitates timely, relevant conversations for your prospects.

Qualified is the pipeline generation platform that helps your revenue teams identify and understand in-market buyers and meet with VIPs using chatbots, live chat, voice-calls, and video.

Now imagine a world where your website harnesses the power of a buying intent, chatbots, and is equipped with a platform that identifies visitors, segments traffic, and facilitates timely, relevant conversations for your prospects.

Built for revenue teams that use Salesforce, Qualified sits on your website and hooks right into your Salesforce Sales Cloud instance so you know the moment Target Accounts, Open Opportunities, Leads, and Contacts arrive on your site. This intelligence is more than just a sales tool in a seller's stack— it's the power of a platform that grows your pipeline, makes your website smarter, and empowers your sales teams to solve customer problems through the power of human interaction.

Meet Qualified

The leading pipeline generation platform for Salesforce, designed to help you engage and convert your target buyers.

Trusted by the world's leading brands



The trusted enterprise platform

