

Tips and Tricks - Sales and Marketing Skills Needed In this Downturn

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At Portage Sales (www.portagesales.com) we offer a range of custom training units designed to accelerate the success of sales and client teams. See below for some of the tips and tricks we like from third-party publishers, that help spark thinking around sales and marketing in the time of COVID.

#1 Sales and Marketing Alignment

“Well-aligned sales and marketing teams have a *major* impact on your business' bottom line. In fact, companies with well-aligned sales and marketing teams generated 208% more revenue from marketing efforts.”

Tips for Aligning Distributed Marketing and Sales Teams:

- Ensure your goals are aligned across distributed marketing and sales teams.
- Have your marketing team listen to sales calls or join Slack conversations.
- Create both formal and informal opportunities for sales and marketing to collaborate.
- Ask your marketing and sales team to create a buyer persona together.
- Document content gaps along a buyer's journey
- Keep track of every interaction your customer has with your company.
- Be customer-centric with your language.

<https://blog.hubspot.com/marketing/remote-smarketing>

“Organizations with tightly aligned sales and marketing teams experience 36% higher customer retention rates.”

“Sales and marketing alignment can help your company become 67% better at closing deals”

<https://blog.hubspot.com/marketing/sales-and-marketing>

#2 Skill for Sales

Skills for salespeople during COVID and virtual sales:

- Creating and delivering engaging virtual presentations
- value selling - providing client financial justification to purchase your services
- Learning remotely through continuous micro-lessons to be more prepared for the sell
- Don't get rid of marketing - create or offer relevant content for every step of the buyer journey



- Understand the opportunity cost of hesitating to make changes or implementing new processes

<https://blog.hubspot.com/sales/transition-to-remote-selling>

Skills for Sales Managers

- Establishing clear communication norms with your sales reps so they know the best way to get ahold of you and one another via the proper channels.
- Create consistent routines and schedules.
- Set measurable goals and KPIs.
- Make time for remote team-building.
- Look for creative opportunities to build relationships.
- Create “how to work with me guides”. You can include: *What qualities I value, Current focus or goal I’m working on, My work hours and time zone, The best way to communicate with me over non-urgent issues (for example, specify if you prefer to be contacted via email, Slack, phone, etc.), How I give and receive feedback, Things I love to talk about, My DISC Style*
- Catalog and optimize sales content — Make sure your reps have access to the information they need when they need it. For remote teams, this often means having a clear electronic asset management system.
- Utilize video for training purposes — Although a rep can’t swing by your desk with their laptop to get help with a CRM function, they can share their screen with you on a video call to quickly resolve their question or learn a new skill.
- Refine the sales process — Review your current sales process to ensure there isn’t any unnecessary friction for your reps. It is worthwhile to periodically walk through the steps a rep took to close a recent deal and to work with them to identify areas of simplification.
- Empower your reps to find their individual workflows.

<https://blog.hubspot.com/sales/managing-remote-sales-team>

#3 Virtual Negotiations (with implications for effective virtual meetings)

1. **Assign clear roles to your team.** Calls or video conferences with four or more parties can quickly go off track. Be sure to ask: Who will open the meeting? Explain a proposal? Answer questions? Summarize next steps? How will we communicate with one another offline?

2. **Specify – and practice with – offline methods for chatting.** There are many cringe-worthy stories of “private” messages accidentally showing on everyone’s screen. To avoid this, use different hardware or programs for chatting. If you are using a computer to Zoom, for example, use your phone and a separate application to chat or text with teammates.

3. **But keep chatting brief.** Messaging during negotiations can be important, but [one study](#) found that multitasking on a smartphone while negotiating led to lower payoffs and being rated as less professional and less trustworthy by counterparts. When communicating with teammates during a negotiation, brevity is a virtue.

4. **Video is best; the bigger the better.** Charles Naquin and his colleagues [found](#) that negotiators communicating by video performed better than negotiators using email or texting. And those using a large computer screen performed better than those using a small one. The easier it is to see your counterparts, the less effort your brain will waste.

5. **Short and sweet.** While video and telephone conferencing are “richer” media than email or text, they are also more cognitively taxing. Human brains are prediction machines, and they must work extra hard to understand gaps, glitches, time lags, and other ambiguities in the interaction. Short, structured video and teleconferences can help keep parties engaged and at their best.

Leading Virtual Negotiations

1. **Connect at the outset.** Taking a few minutes to schmooze or make small talk at the start of a meeting can help set the stage for a more collaborative interaction. Research by Michael Morris and his colleagues found that when emailing, subjects who were randomly assigned to make small talk for a few minutes before negotiating achieved better financial and social outcomes than those who began negotiating immediately. In [another experiment](#), starting a negotiation with humor led to better economic outcomes and better feelings between parties. Particularly in the stressful world of quarantines, making a personal connection can have a powerful effect on what follows.

2. **Clarify constraints and assumptions.** Video meetings and teleconferences can often have “ragged” starts where parties join at different times. After taking time to connect, make sure to quickly clarify the meeting purpose and the time to be committed. If a key party will have to leave early, for example, reshape the agenda as needed at the outset.

3. Westerners: hide your self-view? For Americans and others from more individualized cultures, [evidence suggests](#) that seeing yourself during a video call tends to increase self-consciousness and self-criticism. Particularly if you already have these tendencies, you might want to turn off the self-view when video conferencing.

<https://hbr.org/2020/06/how-to-negotiate-virtually>