BRIEF

How to Harness Data to Improve Your Sales Enablement Strategy

Most sales organizations have no shortage of data. Readiness and CRM systems generate it nonstop, and the total amount can be overwhelming for sales leaders. If you're responsible for sales enablement at your organization, you're likely wondering how to harness the data to drive strategy and improve overall team outcomes.

In this brief we will walk you through some key questions sales enablement leaders have asked, and provide input on the best ways to take your company's data to the next level. We'll share details on how reporting tools work, and what you may want to consider adding to your sales enablement toolbox. You'll see how to leverage personalized, in-depth, real-time and actionable reporting to improve sales enablement in your organization. Why? Because winning sales enablement is the first step in winning deals.

What about CRM Reporting?

If you are one of more than 150,000 companies with Salesforce, the first thing you're probably thinking is – can't I just use that? I already pay for it. The data is rich, and my team is used to it. It's true, Salesforce stores a massive volume of well-organized data and built-in reporting. On the surface, it can seem easy to find a quick snapshot and share.

The real problem with Salesforce reporting is that it isn't as easy to combine multiple data points across the entire organization. Users are frequently limited in the data they are able to pull in one single report. To truly gather all the necessary data, users often need to generate multiple reports, export them and then build spreadsheets in order to develop any sort of actionable insights. This manual process is prone to human error, version control issues, and quite often stale data.

> *For example, if you are looking to see if a BDR has a good call to meeting ratio, you'd have to create one report for how many phone calls each of the BDRs made and another for how many meetings they booked. You would then need to either pull both of those reports into a spreadsheet and perform some basic math, or I eyeball it. Unfortunately, as soon as you pull that data and merge into a spreadsheet, it starts aging. Potentially before that next 1-on-1 meeting when you're set to discuss!*

Ultimately, Salesforce like any other CRM excels at its primary purpose, capturing and storing your organizations in a large database, but falls short in providing contextual information for the specific problems sales managers are looking to address.

Salesforce dashboards allows users to consolidate several reports into one single page, often using visual displays. While helpful to check multiple data points **there are still limitations** in what data you can present.

Do I need a Business Intelligence (BI) tool?

Many organizations today have jumped on the BI bandwagon, hoping it is the key to unlocking their data. BI is great for gaining insight into high level busines objectives and metrics. All well and good if you are a C-level executive looking to report on data at the organization or team level. But what if you really need a tool for your front-line sales managers to use day in and day out? Probably not the right strategy.

Power of Scorecards – Harnessing the Data You Need

Scorecards are different in that they take massive amounts of data and streamline it in a way that's easily digestible and available in real time. For example, Scorecards combine a sales rep's training courses, curriculums, coaching challenges, and enhance it with performance data from your CRM... all tied specifically to the individual. This makes it possible for sales enablement teams and sales managers to focus their energies on what really matters, which is whether the reps are prepared for success and how to improve individual outcomes.

Scorecards fully automate all the data manipulation so sales leaders can focus on the rep-centric context that matters. Specifically, with Scorecards, you and your sales managers can see:

1. All your readiness data organized by sales reps/ team members
2. All your reps relative to their peers on a sales team or in an onboarding cohort
3. Different sales teams or onboarding cohorts compared to one another
4. Standard efficiency metrics including opportunities created, pipeline created, opportunities won and bookings
5. Standard effectiveness metrics including average selling price, close rate and sales cycle

"Scorecards will be able to show not only how reps are doing and what we're doing in a rolling period, but we can marry it with sales production."

Gary Milwit, Executive Director,
Learning & Organizational Development

J G WENTWORTH

Curriculum | Controlling the Sale

Enterprise Sales East team	Buyer Personas		Buyer Ecosystem		Practice: Selling Value		Procur
Passing Score Completed / Enrolled	75 2/4		0 4/4		82 2/4		
Reps [4]	Status	Score	Status	Score	Status	Score	Statu
GG Gino Gradkowski (3/5)	◒	75	✔	50	✖	71	◒
PD Patrick Donlon (5/5)	✔	75	✔	50	✖	68	✔
TJ Taylor Jordan (5/5)	✔	75	✔	75	✔	85	✔
TM Teresa Martinez (3/5)	◒	75	✔	100	✔	94	✔

Scorecards in Action

Scorecards take the guesswork out of managing a sales team. Sales managers are able to harness the data to understand where the gaps are and how to improve their reps.

All Enrollments - By Rep

Last 365 Days

Sales Reps	All Enrollments	Completed	Incomplete	Overdue	Completion %
TOTALS	143	99	51	7	64%
Gino Gradkowski	31	16	15	0	52%
Alex Marino	28	29	6	0	79%
Michael Washingt...	21	14	7	2	67%
Garry Braverman	21	18	3	1	86%
Joan Matthews	21	10	11	3	48%
Teresa Martinez	21	12	9	1	57%

Showing 10 entries

Coachable Data

Unlike CRM and BI, Scorecards put data into a coachable context. That means scorecards help sales enablement leaders and sales managers do three things:

- Diagnose problems with sales reps and sales teams
- Motivate sales reps to improve
- Hold sales reps accountable in weekly 1-on-1s

Diagnosing the Individual

Scorecards help the sales enablement team diagnose the reps who are not completing programs or struggling to master certain subject matter. They also make it possible to easily share information with sales managers and collaborate with reps to ensure they are getting the training they need.

> *For example, if a rep is struggling to generate opportunities and pipeline, then they probably need help with early pipeline skills, such as identifying pain points or finding a sponsor. If they are struggling with winning opportunities and bookings, then it is likely that they need help with later stage skills such as negotiating for power.*

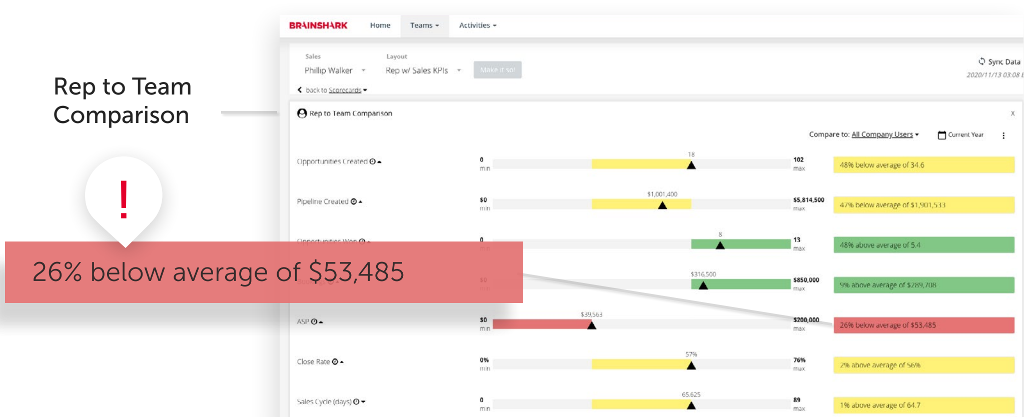
Accountability

Using Scorecards during weekly 1-on-1s is a great way for sales managers to hold reps accountable for completing their training. Managers can add notes directly to the Scorecards in order to set weekly targets and then follow up at the next session. Sales enablement teams can also use this data to hold themselves accountable for continuous improvement of their programs.

> *For example, by comparing the performance metrics of sales reps from different onboarding cohorts, the enablement team can assess whether programs are improving or need work.*

Motivation

Scorecards make it easy to see how reps are performing relative to their peers. No rep likes to finish in last place. Reps will be highly motivated to seek out the training and coaching needed to improve. Instead of seeing training as a chore to get done, reps will see it as an enabler of success.



Are you using the right tool?

CRM	• Massive volume of well-organized data • Basic reporting functionality • Dashboards help visualize data • Deeper insights require manual, error-prone efforts • When combining reports, data can become stale
BI Tools	• Used by C-level executives to gain insight into high level business objectives • Reports not specific to individuals, reflects data at the org or team level • Data is used for leadership and board meetings • Requires a dedicated admin • Significant setup and maintenance overhead
Scorecards	• Built for daily use by front line Sales Managers • Data can be shown from Segment, Team, Manager, or Rep level • Data can be used for leadership, board meetings, Weekly team standups, or 1x1s • Data is in real-time • No need for an in-house admin

Summary

CRM, BI and Scorecards do share some of the same functionality in their ability to capture and report on data. Each is built with a specific purpose in mind and are most effective when used for that purpose. Together, they can each play a role in providing a holistic picture of how your business is doing.

Scorecards provide the most personalized, in-depth, real-time and actionable way to improve sales enablement in your organization. Scorecards automatically put readiness data into a coachable context and enhance it with CRM performance data. This ensures sales managers have everything they need to diagnose problems, motivate reps and hold reps accountable for results. Let Scorecards help you win sales enablement!

About Brainshark

Brainshark's data-driven sales enablement and readiness platform provides client-facing teams with the knowledge, skills and resources they need to perform at the highest level. With best-of-breed solutions for training and coaching, as well as cutting-edge insights into sales performance, customers can ensure their sales reps are always ready to make the most of any selling situation.

With Brainshark, companies can: enable sales teams with on-demand training that accelerates onboarding and keeps reps up-to-speed; validate readiness with sales coaching and practice that ensure reps master key messages; empower teams with dynamic content that can be created quickly, updated easily and accessed anywhere; and use powerful scorecards to visualize sales performance trends and make real connections from improved readiness to increased revenue.

Thousands of customers – including more than half of the Fortune 100 – rely on Brainshark to close performance gaps and get better results from their sales enablement initiatives.

Learn more at www.brainshark.com.

Want to learn more about sales readiness technology?

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