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Best Practices
for **Sales Engagement**

A ClearSlide Guide

Introduction

As the landscape of modern sales evolves based on global trends including mobility, fiscal responsibility, and need for predictability, sales people are finding themselves stretched to do more, sell on the go, and make quota faster.

Selling has become even more challenging in this competitive, connected world that requires sales people to adapt quickly and reach their prospects in ways that will grab their attention when attention is already spread so thin. For example, in 2012 only 63% of salespeople made quota. Sales leaders need solutions to increase productivity and reduce friction in the sales process.

Sales engagement platforms can help sales professionals cut through these challenges by giving them access to key analytics that provide insight into what their prospects want to see, when, and how effective their collateral is during ultimate deal closure.

Leading sales teams have begun using this type of technology to better predict their pipeline and forecast their numbers more accurately by looking at deals that have closed effectively and cloning the success of the salespeople who have closed the most business. ClearSlide has studied and analyzed hundreds of thousands of customer engagements to generate these five best practices for communicating more effectively with prospects and improve quota health.
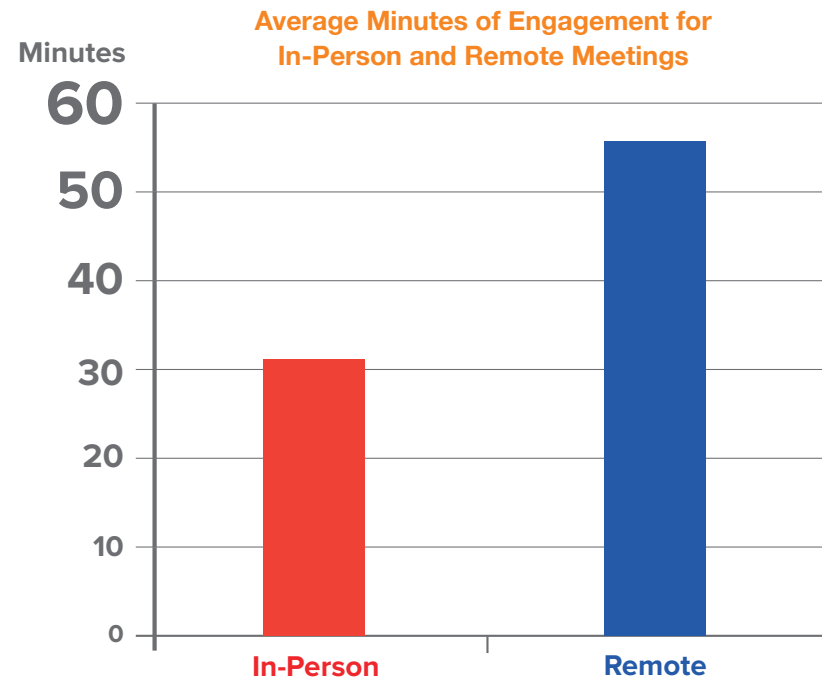
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Spend more time engaging customers ①

Not surprisingly, the first highlight from our customers' data is that greater customer engagement directly correlates to deal closure. The more time that a sales person can engage with his or her prospect, the more likely the deal is to close.

Surprisingly, sales professionals are likely to get more of their customer's time by engaging in a remote meeting, rather than in person—80% more time. Based on ClearSlide's data, on average, salespeople are getting fifty-six minutes per engagement when presenting remotely, but only thirty-one minutes in person. It can be inferred that remote meetings in which sales people are presenting over the phone allow prospects to multitask or save time to a meeting site. This statistic underlines the importance of having reliable technological systems in place that allow for remote selling and communications.

Megan Malone, Digital Director at Summit Media, spoke to the benefit of using a solution like ClearSlide to engage her customers. "With ClearSlide, my sales team was able to maximize their selling time on the phone," said Malone. "We save budget and time by not having to travel to client meeting sites for meetings, ultimately allowing us to shorten our sales cycle and speak with more prospects in less time." Malone's testimonial speaks to the necessity for sales teams to be nimble in their ability to sell remotely and reach their prospects in new ways.

While nothing can replace the human connection of a face-to-face meeting and handshake, focus on implementing technologies that will allow for quality remote interactions.

Average Minutes of Engagement for In-Person and Remote Meetings

Minutes

	In-Person	Remote
60		
50		▮
40		
30	▮	
20		
10		
0		

In-Person   *Remote*

> **We save budget and time** *by not having to travel to client meeting sites for meetings, ultimately* **allowing us to shorten our sales cycle and speak with more prospects in less time.**
>
> **Megan Malone**
> Digital Director - Summit Media

With content, less is more

②

Streamlining content has proven to be an essential element of a successful sales process based on the findings of our study. The data shows that on average, ClearSlide users send decks with 11 slides to prospective customers, although customers have proven to only look at 43% of the content. Data suggests that instead of presenting 11 or more slides to a prospect, make sure your most important content is in the first 5 slides for the greatest impact.

If a sales person's most important slides are after the 5th slide in the presentation, it's statistically likely that his or her prospect won't ever view the content. This represents a missed opportunity and the potential for a negative impact on lead conversion if essential content is not viewed. While trimming the number of slides included in decks sent to prospects, it's also necessary to look at the order of the slides sent to ensure that the most important content is in the first five slides of the deck.

View Time

1 2 3 4 5

5 Slides is the optimal amount for a presentation
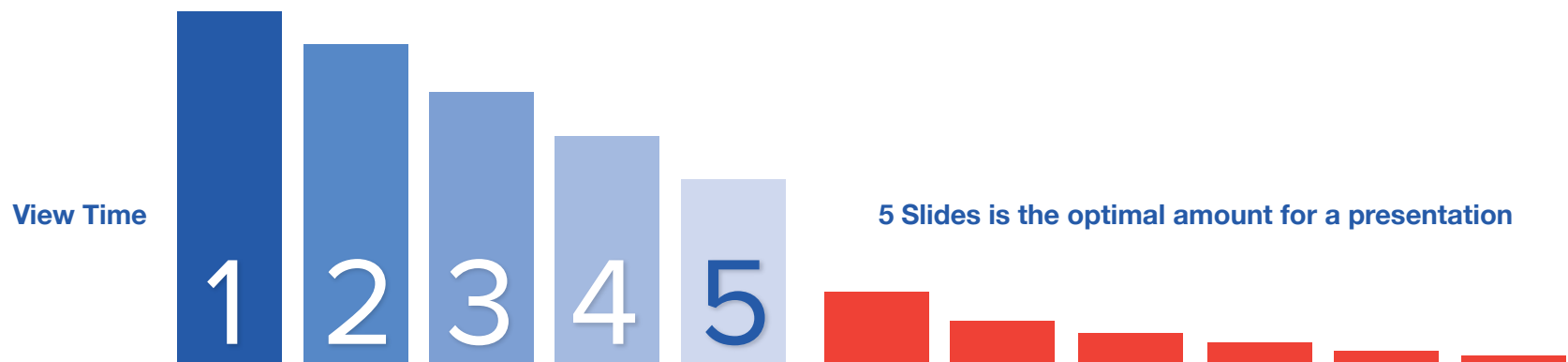
ClearSlide's own COO and Co-Founder Jim Benton speaks to the importance of sending fewer slides with more impactful content, after seeing the success of his corporate sales team, who are inside sales professionals. "I was surprised by the data that most prospects weren't looking past the tenth slide of the break-in deck that my team uses to contact new leads," said Benton. "Most prospects were completely missing the pricing information that was listed on the last slide."

Benton was able to make an impact in the effectiveness of the content being sent to ClearSlide's corporate team prospects with some simple reorganization. "Using ClearSlide's analytics, I was able to coach my team to reorganize the content and move the pricing information to the first half of the deck, which ensures that it's seen much more often. This has resulted in a marked increase in lead conversion for my team."

Get Organized

3

When it comes to sales enablement content, our data suggests that one critical need for sales teams is the organization of the myriad pieces of content that are used during the sales process. Content is shared between teams, between offices, and sometimes even globally. Without an organized repository for this content, sales people waste time trying to find the correct presentation for their prospects and sometimes can even miss the window of opportunity with a prospect if they need to follow-up with the correct content at a later date.

In order to effectively answer customer questions and objections during a meeting, a good sales person needs easy access to his or her content. A chaotic content library can be challenging for even the most seasoned sales professional.

Percentage of material actually used

9%

91%
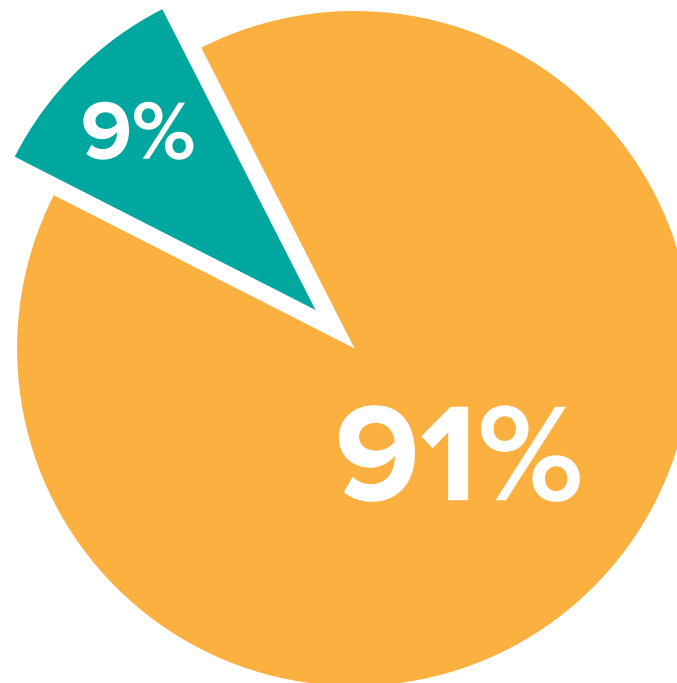
A Look at The Data

Our data has shown that less than 10% of sales materials are actually used. The average ClearSlide customer has over 650 pieces of sales content, but uses only 63. By leveraging data about which content is most and least used, and organizing the content library accordingly, sales managers and marketing teams can see an increase in productivity, as spending less time digging through messy content libraries allows for more time to actually sell and interact with prospects.

Get Organized

3

Michelle McCulloch, Director of Marketing for the West Division at Comcast Spotlight speaks to the way in which having an organized content library has impacted sales teams at her organization. "The marketing team started to use ClearSlide as we create the base content for the sales team to use," said McCulloch. "They can easily grab it, customize it for their client, and get it back up into the ClearSlide platform quickly and efficiently," she said.

Both speed and agility are vital for busy sales professionals, and being encumbered by difficulties in accessing the right content can present a roadblock in client communications and negatively impact deal closure. "From a marketing perspective, it's great when sales teams can use materials faster, assemble them quicker, and get them to clients quicker," said McCulloch of the benefits of organizing the sales content library at Comcast Spotlight.

To make sure your sales content library is optimized for quick and simple access, be sure to do regular culls of materials that are not being used. Replace old documents with new content, and remove any pieces that are out of date or no longer accurate. The time it takes to keep your content organized is worth the amount of time you'll save in the sales process.

> *They can easily grab it, customize it for their client, and **get it back up into the ClearSlide platform quickly and efficiently**.*

Michelle McCulloch
Director of Marketing
Comcast Spotlight

COMCAST SPOTLIGHT®

Change your Content Strategy

4

Most used content type

- PPT
- PDF
- DOC
- KEY
- VIDEO

1% 4% 2%

34%

59%

Our customer data has shown that, sales people rely heavily on PowerPoint and PDF's in their selling cycle. However an analysis of all the content types uploaded into ClearSlide revealed that only 59% of the content is comprised of PowerPoint slides. Sales teams are mixing it up and using many different types of content to drive higher engagement.

That said, only 2% of the content used by ClearSlide customers in their sales process is video. Video is underutilized as a sales tool and can drive much higher engagement. A study by Sunday Sky revealed that video can increase email open rates by as much as 5x, as well as increase the level of engagement with your email by 44%, just by using the word "video" in the email subject line and including a video in the email.
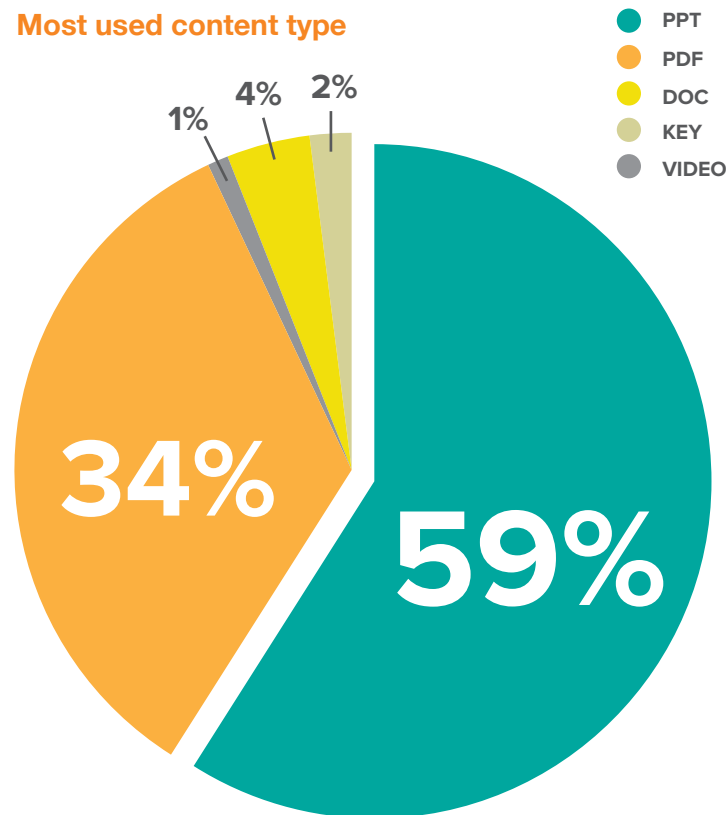
ClearSlide's internal teams have taken these findings to heart and embarked on an internal video project and have noted an impact in email open rates when using video. ClearSlide COO Jim Benton weighed in on the subject, "We have seen a huge increase in our email open rates since kicking off a video project. Our team has shown an impressive increase of 60% month over month in their email open rate," Benton said. "We plan to continue to use video as a medium for reaching out to our prospects and customers and hope for continued success."

Video Vault

With the ubiquitous nature of webcams, sales people can test video with their prospects by recording their own messages on their laptop or mobile device and sending them out to prospects. Or, if more budget is available, set up a small studio in a conference room in the office to record a number of videos at a time and use them across your team. A message from the CEO or sales leader may make the difference between getting a prospect's attention, or missing it.

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Focus on the Human Connection

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While the advent of email has had an undeniable effect on the streamlining of the sales process, our customers have shown that while easy to send, and quick to accomplish, an emailed presentation has less of an impact on a prospect than a presentation that is given live. Live presentations result in spending 7x more per slide than emailed presentations.

Admittedly, prospects and sales professionals alike are all extremely busy. It's tempting to email out sales materials in rapid fire and follow up electronically. However, according to our data, your prospects will be more focused on your content and messages when you are presenting to them either in person or on the phone.

Time per slide (in seconds)

Emailed Presentation

Live Presentation

| 0 | 50 | 100 | 150 | 200 | 250 | 300 | 350 |
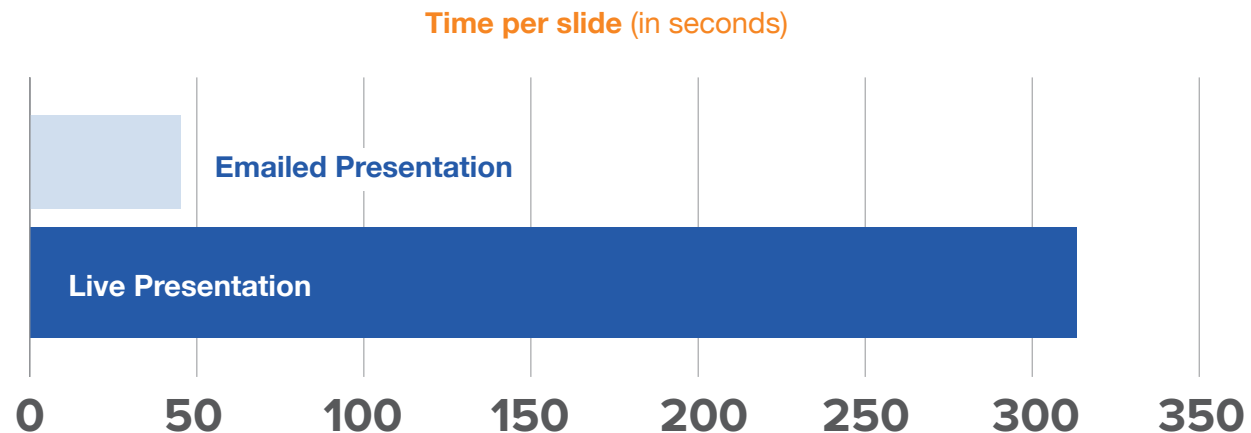
CS▶ Keep it Live

While it's tempting to go on a blitz of emailing content out to one prospect after another, taking the time to reach them on the phone or in person to present your content will have a bigger impact in gaining their attention, and ultimately build a healthier pipeline and positively impact closure rates.

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Conclusion

While the environment and landscape for sellers has changed throughout the years, some things have not – ultimately, the ability to have effective and impactful conversations with prospects and customers is still the cornerstone to a sales person's success. As technology continues to give sellers more tools and change at a rapid pace, it's important to focus on the things that will ultimately positively impact a prospect's experience and merge the art and science of selling.

The selling process is complex, but there are simple things that can be done that will have a large impact on the process. Focus on spending more time engaging with customers, adopting the less is more approach to content, getting your content organized, utilizing video, and driving for more live conversations. These best practices will have a positive impact on your customer engagement and drive higher productivity for your sales team, resulting in more closed deals.

Sources:

CSO Insights

ClearSlide customer data ranging from Sept 2012- October 2013

SundaySky 2012 State of Online Video Report

Embedded Email in Video: Exploring its Viability as a Marketing Tactic; The Relevancy Group June, 2013

Contact Us

About ClearSlide:

ClearSlide improves customer-facing interactions (web, email, face-to-face) by providing real-time visibility and analytics for both salespeople and managers.

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