Sales Leader - Persona Identification

Sally Saleson
VP, Sales

Review & Bonus tied to:
- Revenue Generation
- Budget Control

Who: Sally is someone who has been with company a few years, worked her way up to a sales leader position, or has been in the market for several years. She understands the market and customer needs. She is well educated and highly competitive.

What: Sally need to help her sales team reach their quota each quarterly and year. She has a specific sales process that her team follows and needs a CRM tool that enables the team to follow this cycle and crush their quotas.

Biggest Challenges/Goals:
Hit sales and revenue goals
Shorten sales cycles/increase conversion rates
Enable the sales team with the right tools, content, and training
Maintain pipeline health and forecast accuracy
Develop automated dashboards to track quota achievement and report to leadership
Partner with marketing to align on messaging and drive conversions
Partner with customer success for smooth sales to service hand-off

Sales Leader - Journey Map

Buying Cycle Stage →	Awareness	Consideration	Conversion
Doing	• Finding info on how to better utilize current CRM • Beginning to research different CRM solutions • Making notes about the functionalities that their team needs that they don't currently have • Spending too much time building and managing reports - wishing they had a more time-effective and easy way to do this • Spending too much time customizing their CRM to better meet sales team needs • Listening to sales reps complain that they don't like the current CRM because it takes time for them to complete admin tasks	• Searching for comparisons of different CRMs and creating a list of top CRM platforms and their pros/cons as they relate to their business needs • Signing up for demos of top CRM solutions that made their list • Looking for sales resources: how to improve efficiency of sales team, how to make sales process smooth, how to use CRM to their benefit, how to choose a CRM • Sales reps likely know about the possibility of switching, they may be making a lot of requests and sharing ideas - the Sales Leader needs to take this into consideration and manage expectations • Meeting with internal stakeholders to discuss which CRM is best for entire company - they have to be the voice for sales in these meetings and make sure the sales team gets what they need	• Narrowing down CRM options to top 1-2 vendors • Beginning to research implementation vendors who have specific experience with CRM shortlist, asking the CRM vendors for implementation vendor references, and searching online for implementation vendors • They may be fighting for a certain CRM solution vs. another top contender based on other department (support, marketing, IT, etc.) opinions - they feel pressured to make the case for their favorite CRM • Communicating with their sales reps the process and proposed timeline for rollout and go-live
Thinking	• They know they need a better CRM tool to improve their team's productivity (especially if they are a growing team whose CRM is not scaling with them). • How much would it cost to switch CRMs? (CRM price, process of switching, training costs, etc.) • Does the team have time to be trained on a new platform - will they even use it/will it make a difference? • How will it work with our other sales tools? • Would a new CRM actually fulfill our needs better than our current one?	• Which CRM platforms meets my needs best? • Do we need an external partner to help us implement / provide ongoing support? How do we select this partner? • Looking forward (daydreaming) about how the new platform will help save them time and resources • What financial resources do I need to have/request in order to make the entire process go smoothly?	• Which CRM is the best for the sales team? • What will the process look like? Timeline? Who will all need to be involved? How long will implementation take and what will it require from me and my team? • What will we do for ongoing CRM support and troubleshooting?
Feeling	• Apprehensive: I don't want to spend much money, or too much time training/migrating • Confused: Which option is best? Which option works with my team's processes? How do I compare my options? • Nervous: how would this impact my team's ability to meet their quotas? How will this impact current deals? • Anxious: What if I push this through and it's a disaster?	• Overwhelmed: There are so many options for CRM platforms, and even more options for implementation partners. • Relieved: They understand the process of purchasing through implementation better and they have looped in other key stakeholders from the company to help make the decision	• Relieved: They have finally chosen/are very close to choosing which CRM they want to purchase • Excited: They can't wait to implement the new solution and save time (for themselves and their team) • Worried: There's still a lot to do a lot that can go wrong. They are nervous about the implementation process and how it will disrupt sales rep time and their own time

Sales Leader - Campaign Content

Buying Cycle Stage	Content Types	Content Topics
Awareness	• Blogs • Videos • Guides • Business case templates • RFP templates • Infographics • Quizzes/calculators • Thought-leadership webinars	• What functionalities you should look for in a CRM • Average timelines/budgets/ROI of CRM systems • How CRMs help tracking/driving attainment of quotas • How sales should align with other teams to decide which system is best for them • How-to: get insight from your team about what features they need + set expectations • MasterSolve specific resources: CRM Readiness Assessment, Sales & Marketing Alignment Tool, CRM Requirements Roadmap, and CRM Business Case, CRM System RFP Guide
Consideration	• Reports • Quizzes/calculators • Client success stories • Guides - tool to download to help them understand what time/effort will be needed from the sales team to implement a new CRM system • Product webinars and demos	• Sales-specific comparison of top CRM platforms based on specific things (price, easability of use, average time to implement, scalability, sales-specific features) • ROI/benefits of having an implementation partner/Managed Services • What to look for in implementation partner • MasterSolve specific resources: CRM Vendor Evaluation Guide, CRM Vendor Matrix
Conversion	• Client success stories • Sales talk track & demo scripts • Demos/Free trials • Webinars and Events	• Implementation and user adoption of new CRM systems • How to minimize sales team interruption because of a new CRM • ROI/benefits of having an implementation partner/Managed Services • How to prep yourself and your sales team for CRM implementation • How to quickly get your sales reps over the Salesforce/Zendesk/Pipedrive learning curve (provide best practices and common tips for each) • MasterSolve specific resources: CRM Consultant RFP Guide, CRM Implementation Guide, CRM Implementation Timeline One-Pager