# THE CMO'S GUIDE TO SALES ENABLEMENT & CRM: ADVICE FROM TOP B2B MARKETING LEADERS.

**From working with lots of CMOs, we know one thing: You are on point when it comes to blazing new trails and mastering digital strategies. You have a ton on your plate and yet you're still pushing to be on the cutting edge of inbound, digital and content marketing. Huge high five to you—you're our heroes.**

Yet there's one place we sense you're feeling a little insecure.

Yep, it's your mastery over the sales stuff.

How do we know? Well, a question we've been hearing a lot lately is:

**"DO YOU HAVE ANY LITERATURE ON HOW TO USE [INSERT CRM HERE]?"**

We hear this all the time from some of the smartest, most fabulous CMOs we have the pleasure of working with.

And we get it. Customer relationship management is so many things. It's the way you prove your marketing is working. It's an ongoing negotiation with your sales team. It's something you have to personalize to your preferences.

***That's why we created this eBook—to offer you a little advice as you figure it all out.***

So, back to your question:

# "HOW SHOULD I USE MY CRM?"

We think that's actually a big question with a lot of little questions bundled up inside it.

*Questions like:* »

*"Who should get notified when we get a new MQL?"*

"WHAT WILL IT LOOK LIKE WHEN IT'S WORKING?"

"Am I doing this right?"

*"How should I set up my CRM?"*

"HOW ARE OTHER CMOs DOING THIS?"

"How can I get my sales team to actually use this thing?"


**Whether you're loyal to HubSpot, Salesforce or another CRM, there are steps you can take to make sure your platform is working smashingly.**

We think, when a CRM is working smashingly, it means it's ***enabling sales to prioritize leads and close more of them, faster.*** Hence the ever-popular jargon-y term "sales enablement."

You probably know this already, but sales enablement (as defined by SiriusDecisions) is a relatively new function that works to "ensure that every seller has the required knowledge, skills, processes and behaviors to optimize every interaction with buyers."

What might sales enablement look like at your company? Often, it starts with three little letters.

# CRM

# THE PERFECT CRM...

**Let's picture what a perfect marketing automation/CRM setup/sales enablement trio looks like in an ideal world where everything is fabulous.**

It's Monday morning. You log into your marketing automation platform and find that ...

**Traffic is up?** #winning / **Leads are up?** Woo-hoo! / **Landing page conversion rate is over 50 percent?** AMAZING!

Even better, the leads you're nabbing are automatically logged into your CRM, giving you a crystal-clear view of how well your campaigns are working.

Because your CRM was so perfectly customized, your new leads automatically get routed to either a lead nurturing campaign or a sales rep, depending on the triggering action.

Your reps get notified when a lead is ready for contact and the connection gets made right away, with no intervention necessarily from you.

Once your sales rep calls that hot new lead, he either moves the lead to the next deal stage or re-enrolls him back into the nurturing funnel, making sure to note any useful information he learned during the qualifying conversation into the CRM.

Best of all, your CRM helps you figure out the number of qualified leads and closed sales for each of your campaigns. That means you can look back on all the things you did right that made it easy for your reps to land that big sale—and you can replicate your magic formula.

That's definitely your reality, right? If it's not, you're not alone.

***To make your situation match up to the one described above, here are some things you can do.***

# PREP YOUR CRM FOR GREATNESS

*To keep it simple, we're going to use the HubSpot CRM in all of our examples.* If you're not a HubSpot CRM user, the general advice we give will still apply, but some of the specific steps will differ.

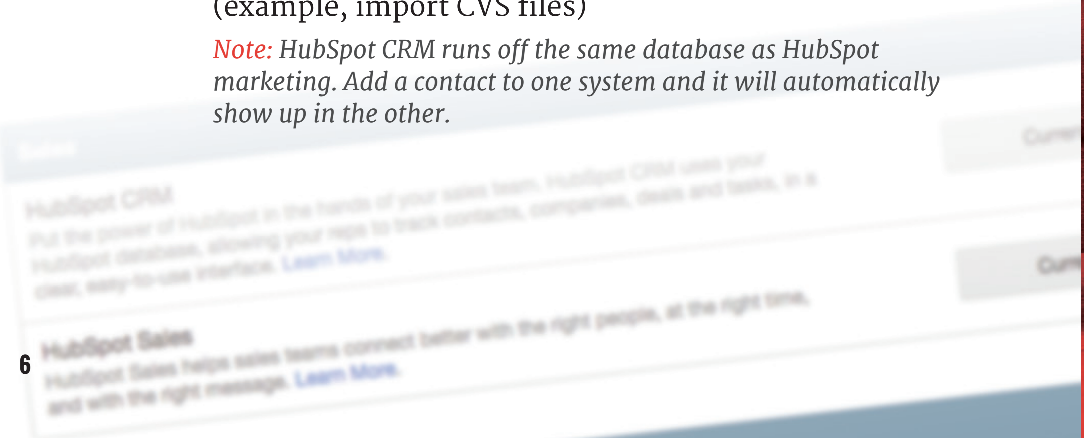
## HUBSPOT USERS:

# SET UP YOUR HUBSPOT CRM

**If you don't have the HubSpot CRM yet, you can create an account here.**

*Then, take the steps below.*

1. Go to **Settings > Products & Add-Ons**
2. Click the link to activate HubSpot CRM
   *Only administrators have access to this setting.*
3. Once activated, you'll see a new dropdown menu appear in the upper left corner of your screen
4. Log in via that dropdown menu
5. Go to **Settings > Users** to invite as many users as you'd like
   *Each invitee will receive a welcome email with instructions on how to set up their account.*
6. Install HubSpot Sales (formerly Sidekick) to integrate email
   *If you use Gmail in Chrome or Outlook for Windows, HubSpot Sales will share prospect/customer information between your CRM and email platform.*
7. Add contacts and companies to database (example, import CVS files)
   *Note: HubSpot CRM runs off the same database as HubSpot marketing. Add a contact to one system and it will automatically show up in the other.*



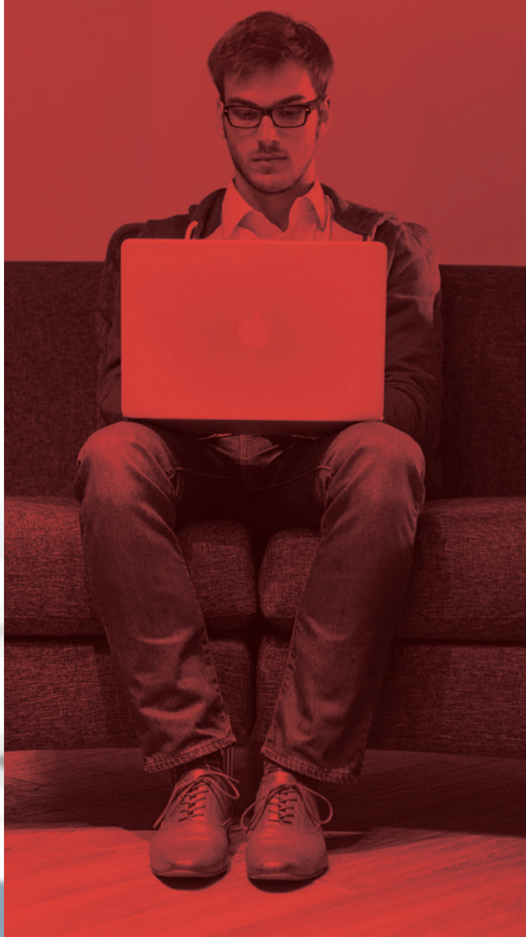
### CRM CHALLENGE:

"My contacts won't sync."

**WHAT'S GOING ON:**
Issues syncing contacts between your CRM and marketing platform.

**LIKELY CAUSE:**
The sync list. If a contact isn't on the list information, it won't get synced.

**QUICK FIX:**
Set up this list using Lead Score or Lifecycle Stages. Dictate which contacts you want to sync (MQL, SQL, Customers, etc). Anyone not listed in this lifecycle stage will not be synced between the two systems.



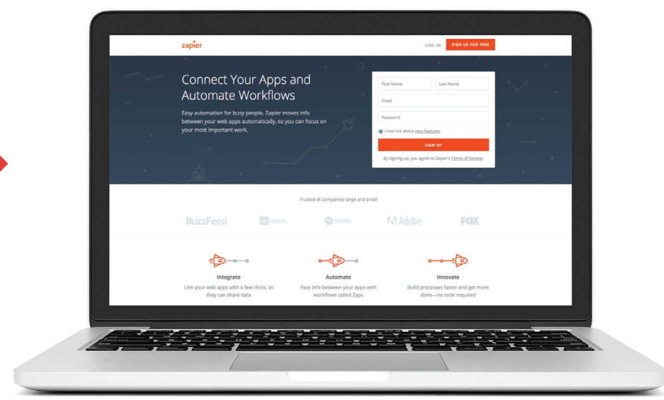
# THE JOYS OF INTEGRATION

**You already know your CRM should integrate with your marketing automation platform.**

***Let's take a look at how this works with the HubSpot CRM.***

HubSpot's CRM natively integrates with HubSpot Marketing and doesn't require any kind of setup. As soon as you start using HubSpot's CRM, information about contacts becomes visible from HubSpot Marketing (and vice versa).

If you don't use HubSpot but want to try the CRM, it's possible to build a basic integration with other marketing software providers through Zapier. Or, with some technical expertise, you can use one of HubSpot's open APIs to integrate HubSpot CRM with virtually any system.




## CRM CHALLENGE:

"My data isn't getting updated in the CRM."

**WHAT'S GOING ON:**
Data isn't accurately updating between your CRM and marketing platform.

**LIKELY CAUSE:**
There's a discrepancy within the update rules for your property types.

**QUICK FIX:**
First, determine which system will be the primary record and which will be the secondary. Next, determine how you want the data to be updated between the two systems (at the property level). HubSpot offers four options.

## Most CRM systems will organize your contacts into different types.

The HubSpot CRM calls them "object types" and uses the following three categories:

CONTACTS | COMPANIES | DEALS

"Objects" can be associated with one another by adding "properties." Each object will also have its own timeline where sales reps can log calls, emails, tasks, notes and other activities.

### CRM CHALLENGE:

# "I'm over my API call limit."

**WHAT'S GOING ON:**
Notifications of API Call Limitations.

**LIKELY CAUSE:**
CRM solutions generally have a limit to the number of API calls you can log within a specific time period.

**QUICK FIX:**
Avoid overages for large list syncs by syncing records in batches. Note: If your CRM is attached to other platforms, calls from those platforms will also count toward your total. Setting a limit to HubSpot API calls per day will help you manage usage and avoid overages.

### CRM CHALLENGE:

# "My property types won't map."

**WHAT'S GOING ON:**
Non-compatible property mapping types.

**LIKELY CAUSE:**
Often, the definitions for properties can vary between two systems.

**QUICK FIX:**
To sync properties between two systems, make sure the data types in both systems are consistent. This will vary depending on which systems you use.

# USING YOUR CRM IN REAL LIFE

**Once you have the CRM up and running, with fields mapped and lists synced, here are some everyday actions you'll want to take when you log in.**

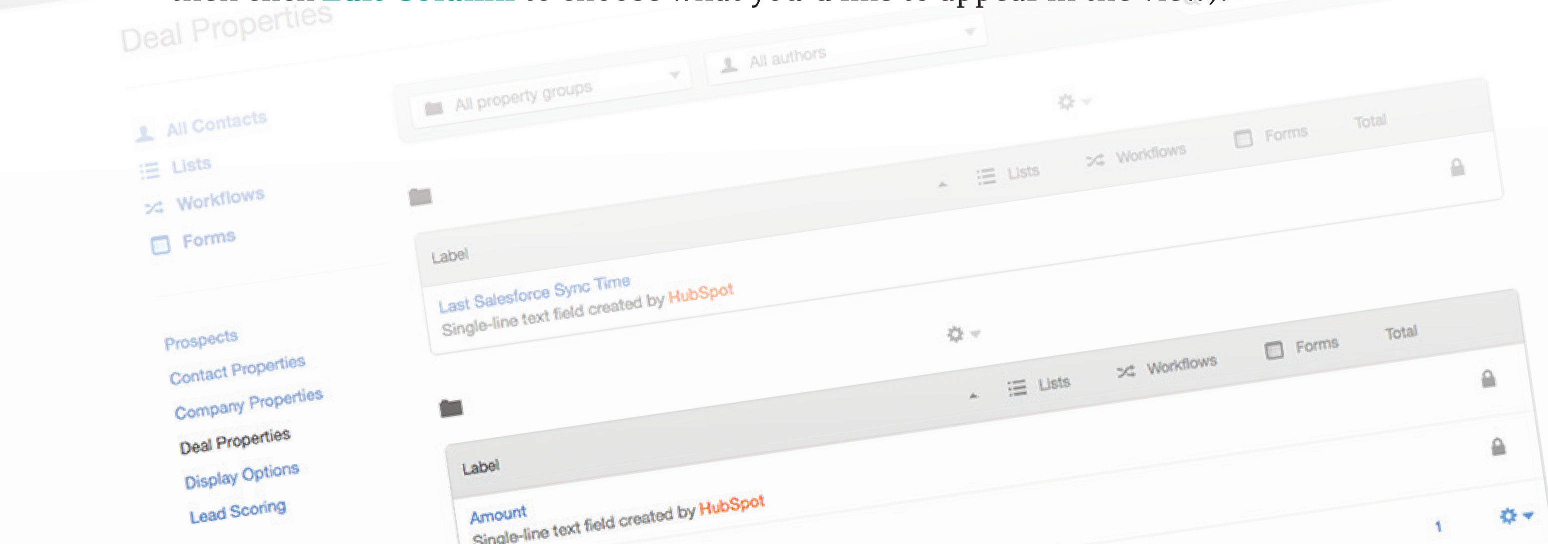
## CREATE 'VIEWS'

Views come standard or can be customized to **help you manage your leads**.

> ***List view*** is the default layout HubSpot CRM will create for your objects. You'll see an overview of contacts, companies, deals and tasks listed in table format, and you can customize which property columns are included in the view.

> ***Board view*** will specifically showcase information related to deals and tasks. What's neat about this view is the ability to change a deal stage or update a task's status by dragging and dropping the item to a new column.

Toggle between these two views, or customize other views by filtering contacts, companies and deals using any property (click the **Settings** cog in the top right corner, then click **Edit Column** to choose what you'd like to appear in the view).



## CREATE TASKS

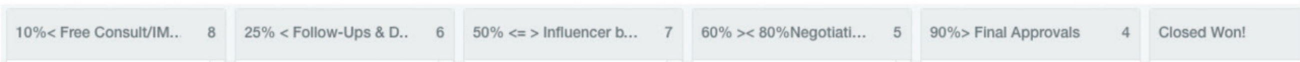
As your reps work a lead, tasks can be created to keep them on track. Use the given fields to define the task (status, due date, assigned to, description) and associate tasks with specific contacts, companies or deals.

## STANDARD & CUSTOMIZABLE DEAL STAGES

Deal stages are a default property of HubSpot's CRM, and will ensure that marketing sees when contact is made, and whether the lead was qualified during the initial contact. You can use the standardized deal stages, which include:

- Appointment scheduled
- Initial contact
- Qualified to buy
- Presentation scheduled
- Decision maker brought in
- Contract sent
- Closed won
- Closed lost

Or you can customize your deal stages by going to **Settings > Deal > Edit, Delete or Add New**. If adding a new deal stage, give it a name and probability score to indicate how likely it is that a lead will buy at this stage. This will help with lead flow and lead management. Once finished, click out of the box and drag the new deal stage to the appropriate spot on the stages list.




### CRM CHALLENGE:

"My reps aren't adding contacts to their opportunities."

**WHAT'S GOING ON:**
Opportunities are created without a primary contact attached.

**LIKELY CAUSE:**
Many CRMs allow sales reps to create an opportunity without a primary contact, but HubSpot does not.

**QUICK FIX:**
Before integrating CRM opportunity records, it's essential that each opportunity is attached to a contact record in your CRM. This might require a process change for your sales team, but it will ensure that HubSpot can assign the correct contacts to opportunities.

## CREATING LEAD FLOW

Now you need to prep the system to support a healthy lead flow from the top of the sales funnel to the bottom (without leads bottlenecking, getting lost or becoming miscategorized).

### *Why does lead flow matter?*

1. Poor lead flow results in lead saturation, which will overwhelm your reps, causing them to miss the real opportunities in their midst.
2. A messy lead flow makes it harder for reps to follow up in a timely manner.

Two stats that show **how important lead flow is:**

**50%** Buyers are 50 percent more likely to choose the vendor that responds first.

**21x's** A lead is 21 times more likely to enter the sales process or become qualified when contacted within 5 minutes versus 30 minutes.

The problem is the ***average*** response time is approximately 61 hours, and 47 percent of companies don't respond at all!

To support healthier lead flow, you need to create a lead scoring and grading system to ensure leads "flow" smoothly through your closed loop reporting system and get distributed to the right sales rep at the right time.

# TO SET UP A SIMPLE LEAD SCORING SYSTEM, FOLLOW THESE STEPS.

**1** ***Decide what your ideal leads look like and make a list of what they have in common.***

Here are some things you probably know about your leads: job title, industry, number of employees, annual revenue, number of pages viewed on your website, number of forms submitted. All—or none—of these can be factored into your lead scoring. Decide which of these factors are characteristics of your best leads by looking at your best customers and opportunities for clues.

**2** ***Determine point values for each of the factors you listed in step No. 1.***

Stick to a point scale of 0 to 100 and prioritize based on how ready a lead would be to chat with a sales rep.

**3** ***Score leads.***

In HubSpot, this is done by assigning positive and negative attributes to your contact (adding or subtracting points from their score).

***In Salesforce, lead scoring is handled a little differently, and involves creating "fields" to be used as lead scoring "factors" (for example, budget, decision maker, time frame).***

**4** ***Set a score threshold to indicate when a lead is ready to be passed to sales.***

For example: 75 points or higher. Talk with the sales team to find out which method of transfer they prefer: export, email, assigning them in HubSpot, etc.

***After reps make contact, marketers can use a custom field or button as a trigger to allow reps to re-enroll contacts back into the nurturing funnel if needed***

***Don't expect this scoring and grading system to be accurate the first time around.*** Sales and marketing will need to meet and discuss if lead flow is sufficient or if scores need to be adjusted to push higher quality leads to sales without stifling the number of leads sales has to work with. It's a balancing act, and it takes time to perfect.

# THE PROPER CARE AND FEEDING OF LEADS

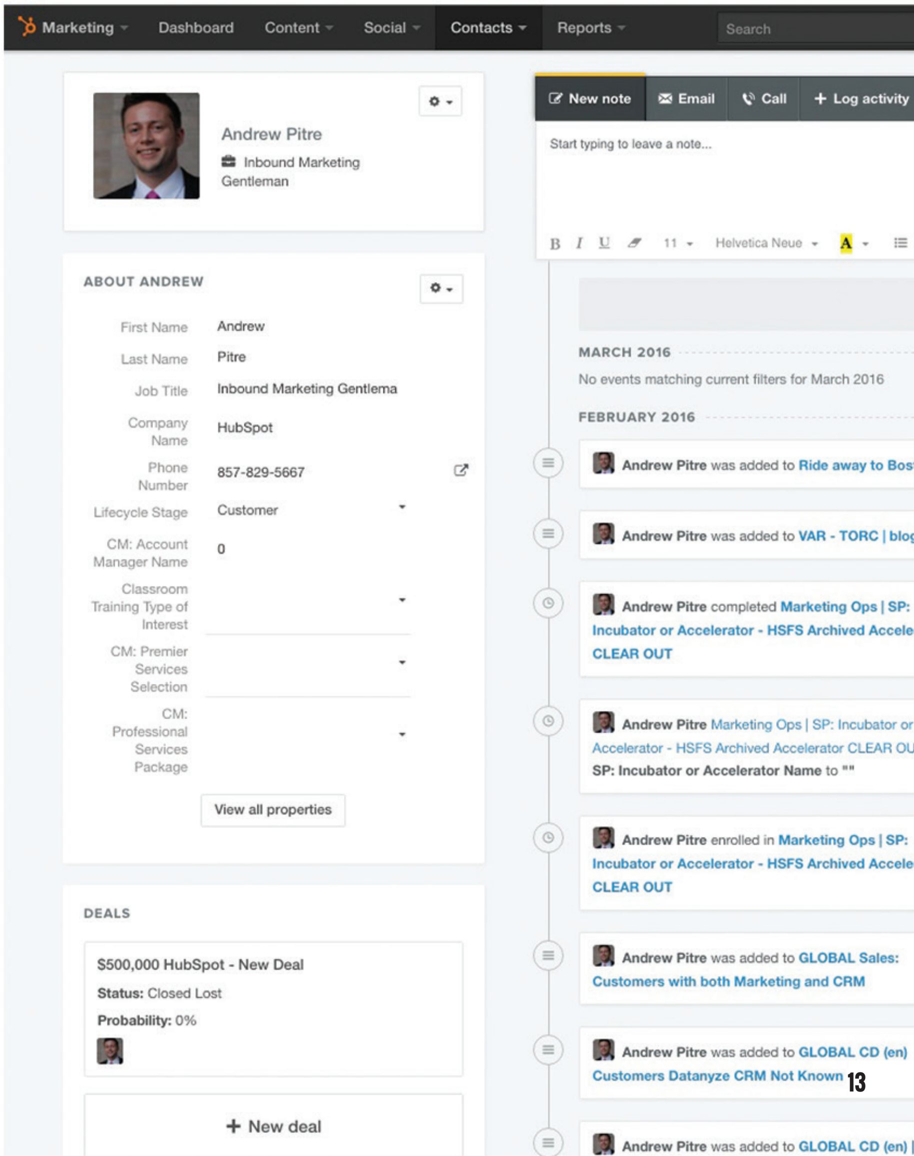
**You put a ton of effort into generating leads, but 50 percent (if not more) of those leads you generate aren't ready to talk to sales yet. Many of them will never be. So what do you do?**

**In the marketing world, what you do with these leads often gets called "lead management."**

## LEAD MANAGEMENT IS HOW YOU HANDLE LEADS THAT AREN'T READY TO BUY YET.

Some of the rewards of lead management include...

- *Reps only talk to the most qualified leads.*
- *You can connect the dots to show which campaigns attracted the highest quality leads.*
- *You can improve the buying experience by generating information that sales can use to personalize conversations with potential customers.*



# Here's a zoomed-out view of what your lead management might consist of:

## 1 PROSPECT TRACKING

HubSpot offers a proprietary prospect tracking tool (as do other CRM solutions). Prospect tracking allows you to see who visited your website and what pages they viewed. You can also determine whether multiple people from the same company have interacted with your website.

## 2 LEAD INTELLIGENCE COLLECTION

This lead intelligence should consist of everything you discover about your leads through form submissions, website page views, email marketing analytics and social media interactions.

## 3 LEAD SCORING

As we pointed out earlier, lead scoring facilitates a healthy lead flow and organizes leads based on sales readiness to support the proper timing of lead hand-off to sales reps.

## 4 CUSTOMER RELATIONSHIP MANAGEMENT

Also discussed above, CRM includes basic setup, integration and customization to create a powerful and automated closed loop reporting system.

## 5 ONGOING LEAD NURTURING

Targeting leads with personalized, relevant, contextual information and content to help them reach sales readiness.

# GETTING ACTUAL HUMANS TO USE YOUR CRM

**You can do everything we've already talked about right and still run into issues.**

**The truth is, your CRM is only as good as the people who use it.**

## THE FACTORS THAT AFFECT YOUR CRM STRATEGY'S SUCCESS INCLUDE THINGS LIKE ...

- *The age and sophistication of your marketing and sales technology*
- *Your sales team's comfort level with technology*
- *The degree to which your sales reps understand the inbound philosophy*
- *The leadership team's buy-in to your CRM strategy*

So, to find out how to handle the sticky human issues involved in CRM adoption, we turned to people who have been there.

# REAL ADVICE FROM MARKETERS WHO'VE BEEN IN YOUR SHOES

*We interviewed a handful of B2B marketing leaders who have successfully implemented CRM and sales enablement strategies at their companies to find out how they did it.*

## OUR PANEL OF EXPERTS INCLUDES:

**Sabrina Adika**, *Marketing Programs Manager at Ingenico Group*

**Evan Kubitschek**, *Online Marketing and Lead Generation Manager at FoodLogiQ*

**Courtney Wilson**, *Director of Marketing at CloudFactory*

**Peter Mollins**, *VP of Marketing at KnowledgeTree*

**Christine Hanson-Ehlinger**, *Director of Demand Generation and Marketing at Avadyne Health*

**Miriam Tenorio**, *Director of Marketing at Transonic*

**Tiffany Rivers**, *Director of Marketing at iOffice*

***Here's what they had to say...***

# GET BUY-IN FROM THE BEGINNING

**Leading a successful CRM integration means getting buy-in from both company leadership and the sales team. Most marketers agreed that the CRM directive must come from the top.**

Evan Kubitschek at FoodLogiQ says, “The use of Salesforce at our company was definitely a top-down decision from the leadership team, which helped drive the initiative forward.”

Sabrina Adika at Ingenico Group suggests involving sales in the CRM setup process as early as possible. “Get buy-in from sales early about things like what data to collect from prospects on forms, the different business types, and other items that are really key. It’s crucial to make sure everyone is aligned as early as possible on the different data points that you want to collect, like contact properties.”

# KEEP IT SIMPLE

**Most marketing leaders we interviewed agreed wholeheartedly on this point: Above all, simplify your process as much as possible.**

Says Courtney Wilson at CloudFactory, “Younger reps are more comfortable with technology, whereas older reps often don’t want to deal with it and also don’t take it very seriously. Don’t make it more complicated than it needs to be.”

Many salespeople view CRM as a necessary evil. Give them too much or unnecessary functionality and you’re likely to perpetuate their negative outlook.

“Use workflows and formulas to automate things,” Wilson says. “Don’t ask for data that isn’t relevant to moving the business forward. Also, use HubSpot to drive automation in your CRM.”

Christine Hanson-Ehlinger at Avadyne Health, adds, “Owners and teams in any size business have so many hats to wear. The simpler you can make the CRM and the sales process, the easier it is  to put more focus on what’s important—your customers, building new business and delivering great service.”

# SHOW SALES THE VALUE... AND SUPPORT THEM

**Oh, the irony. You're a marketer, but one of your major jobs is to sell sales on how CRM adoption and a sales enablement strategy can:**

- Simplify their job
- Produce higher quality SQLs
- Reduce lead saturation
- Improve their ability to communicate effectively with leads
- Shorten the sales cycle
- Earn more money
- Help them consistently meet quota

Says Transonic's Miriam Tenorio, "Our initial challenges included poor follow-up notes and dispositioning of leads. It seems like having someone whose sole focus is CRM follow-up, tracking and training sales is key to gaining acceptance."

FoodLogiQ's Kubitschek says, "I make it a point after every campaign, to report on the success and ask sales specifically how we can help them better do their job. What can we change that makes their job easier? We make sure that sales is aware of what marketing's trying to do end to end and how we're trying to help them do their job more effectively. We're trying to hand them as much information as possible to inform their conversations with the lead. That's how we approach it. It's definitely a relationship rather than two teams working separately."

# CHOOSE THE RIGHT CRM

## There are dozens of quality CRM solutions from which to choose. To pick the right one for your team, you have to understand your needs.

Tiffany Rivers at iOffice, says, "Choose a platform that will grow with your needs and don't manipulate it to work for your processes. If you have to make changes to the backbone of the CRM to do what you want it to do, then it isn't the right tool—or you need to look at your processes to see if they really make sense."

Peter Mollins at KnowledgeTree suggests that marketing leaders must "understand the friction points in the sales process and the buyer's journey" before choosing a CRM.

The key was finding a CRM that was "robust, but right-sized and innately simple to use," says Hanson-Ehlinger at Avadyne Health.

"Make sure it's simple to set up, administer and use," she says. "Ensure it has just enough customization without over-complicating it. Make sure the implementation team will be helpful moving your data from another CRM, if that is the case. Make sure it has a excellent mobile app with full functionality."

# SPRING CLEANING

## Before bringing sales reps into the process, marketing should first get its ducks in a row.

"I'd advise marketers new to CRM to get their house in order first in terms of the plumbing of marketing automation and CRM," suggests CloudFactory's Wilson. "In terms of the campaign tracking, field mapping, lead scoring, personas, lifecycle stages… document all of it in a playbook. Then move on to the actual lead process and help sales think about the flow. Sit down with the sales team and leadership and really map out the sales process and buying journey from start to finish. That will help in setting up processes."

# TRAIN SALES AS CLEARLY AS POSSIBLE

**Our discussions with marketing leaders about training unearthed two key themes. First, keep your training simple and make sure it's ongoing.**

"Keep training tools simple, such as screenshots of CRM functions along with easy to understand tips or directions in one small guide specific to your company that the sales team can access within the CRM," says Hanson-Ehlinger. "Include a revision date so you can update with new information as common questions arise. An hour or two of group training suffices with the sales team, then follow up for one-on-one specific questions as they come up. Provide a resource they can go to for answers and to solve problems as they happen. The more you make it easy, the better the adoption."

Another important theme was getting sales to understand the inbound methodology and how marketing automation platforms and CRM systems work together to benefit sales reps.

Says Kubitschek, "In terms of inbound, reps want to know why we're doing it. How does it help us, versus outbound cold calling and cold emailing? What we try and do is show them the wealth of information that we have from our inbound efforts. How these people are requesting to have a conversation with us—they want to hear from us. We already established a relationship and that makes it easier for sales to sell. It's really pitching inbound as a way that we're helping them and enabling them."

# MAKE NO EXCEPTIONS

**At some point, it is very likely at least one of your top sales reps will ask to be an exception to the rule. He'll have a great argument for why your proposed process doesn't work.**

***It'll be hard to say no—but do it anyway.***

Says Hanson-Ehlinger, "I've always felt that the CRM's importance beyond pipeline management is being a repository for the intellectual assets of the company—the client list, the prospect list, making it simple for sales and customer service teams to capture crucial information. Let's face it, salespeople or customer teams can come and go. In order to not have that disrupt customer service or the business as a whole, it's critical to enforce accountability to using a CRM, so you know the status of an account at any time."

# BE TRANSPARENT WITH YOUR MARKETING DATA

**Sales is under close scrutiny once CRM adoption gets under way. It's only fair that marketing should be, too.**

Marketing should make its performance data just as visible as the sales team's performance data to level the playing field and illustrate accountability in the same way that sales does.

"Be sensitive to the fact that every win and loss for a rep can be seen in the CRM," says Wilson. "Also, incentivize your marketing team to focus on revenue and quality leads, put out goals and make them visible. If everyone has a quota, it breaks down the divide between the two teams."

# GETTING EVERYONE ON BOARD

**When you set up your sales enablement strategy and CRM system right, your sales team is more productive and your reps get the support they need to work the leads you generate.**

On the flip side, you get to see the value of your efforts and receive the feedback you need to refine your campaigns.

Most importantly, leads are connected with sales reps at exactly the right moment—when they are truly ready to take the next step.

It's a world where everyone wins, and that's what makes sales enablement a must-have for both teams' success.

## IF YOU'RE READY TO TAKE YOUR SALES ENABLEMENT STRATEGY TO THE NEXT LEVEL, LET'S TALK.

*Schedule a call with Kuno today!*

CLICK HERE