



Building a sales team and a sales process by Vourneen Taylor

@aboutinbound

ACTIVITY: Introduce yourself

Hi, my name is

My company, [company name]



Provides/ is developing [value/ service/ outcome]



Inbound Strategy Workshops & Hubspot consulting for successful teams.

- 15 years experience in sales & marketing
- Helped consult & train 350+ Hubspot customers
- Trained staff internally at Hubspot



@aboutinbound



GOAL

1. Implementing better structures when building a sales team

+

2. Implementing a robust sales process

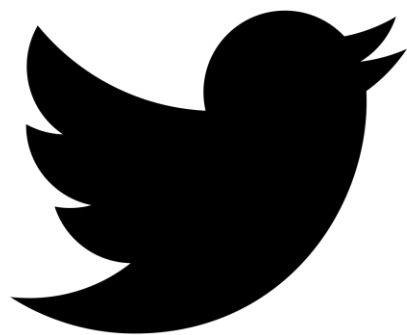
=

3. Helps sales teams sell efficiently at a higher velocity

Live Twitter Poll @aboutinbound

Go to **@aboutinbound** on Twitter

Q. What is the main thing that prevents your sales teams from selling more?



- Lack of quality leads?
- Lack of productivity?
- Lack of training?
- Lack of tools?
- Other?? Add a comment

1. Building a sales team

Revenue

1. Building a ~~sales~~ team

What
department is
having the
greatest impact
on the sale?

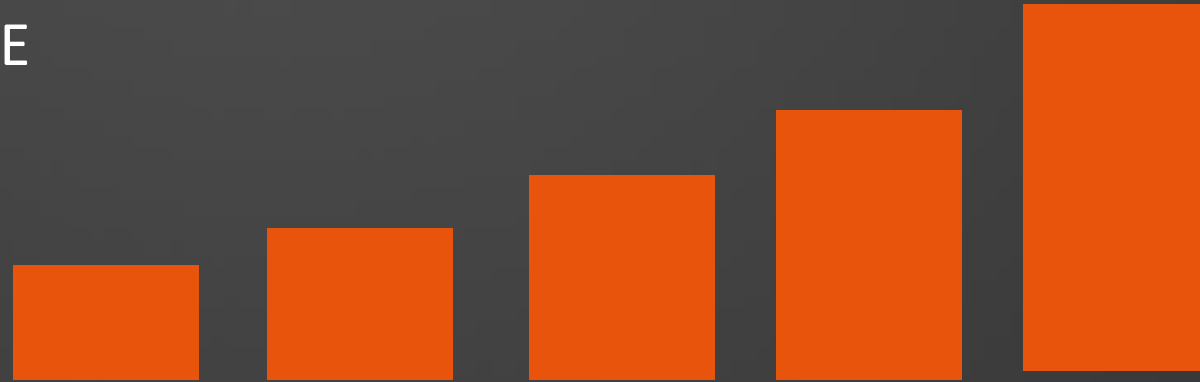
70%

of a buyers research is done
before they talk to sales.

Source: Hubspot

What
department is
having the
greatest impact
on **revenue**?

INITIAL
SALE



70-95%

of the revenues come from
renewals and upsell.

Source: Forentrepreneurs



It's a team effort.

“IN A WORLD WHERE OUR AIM IS
TO CROSS-SELL MULTIPLE
PRODUCTS INTO THE SAME
COMPANY, IT’S MORE
IMPORTANT FOR US TO DEFINE A
TARGET COMPANY THAN A
TARGET INDIVIDUAL”

ACTIVITY: BUYER PROFILE

1. Are there customer sizes that are ideal/ not ideal?
2. How do you define size?
e.g. employees, customers revenue or another metric.
3. Are there geographic locations that are ideal / not ideal?
4. What types of business's do you sell to?
e.g. b2b, b2c, ecommerce, software etc.



Ideal Mid-Market Company Persona

Company Attributes

- Usually B2B
- Evidence of budget; likely already paying for some kind of software or paid campaigns

Ideal Mindset

- Has smart ideas about their own goals & strategy, but still values our thought leadership.
- Already understands the role of tools like HubSpot Marketing and HubSpot CRM.
- May already be using a CRM system they perceive to be too complicated or too expensive.
- Marketers & salespeople interested in growth and improvement in their skills.
- Comfortable with technology, but value simplicity and speed over infinite flexibility.
- May need help getting set up early on; relatively autonomous once they hit th

Team Characteristics

- 11-200+
- 2+ marketers
- 3+ salespeople

Common Industries

- Software / Tech
- Manufacturing
- Business Services
- Telecom

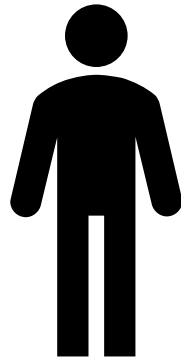
Human Resources

RECOMMENDATION >

Unite behind a single
company persona instead
of focusing on individual
users.



Buyer



Seller



Build a team around your customer

Who is doing the selling?

- Is it your website?
- Is it your content?
- Is it your reps?

?

Seller



Finding the right seller for your team & keeping them engaged?

1. Hiring = coachability
2. Culture = employer branding, always be helping
3. Shared revenue goals = alignment
4. Continual learning = competitive advantage

2. Building a sales process

Sales methodology

Definition:

Your organisations philosophy or approach to driving sales effectiveness.

Examples:

- Inbound sales methodology
- Solution selling
- SPIN selling
- Challenger selling
- Consultative selling
- Strategic account selling
- Customer focused selling
- Conceptual selling

Inbound sales methodology



Sales Process

Definition:

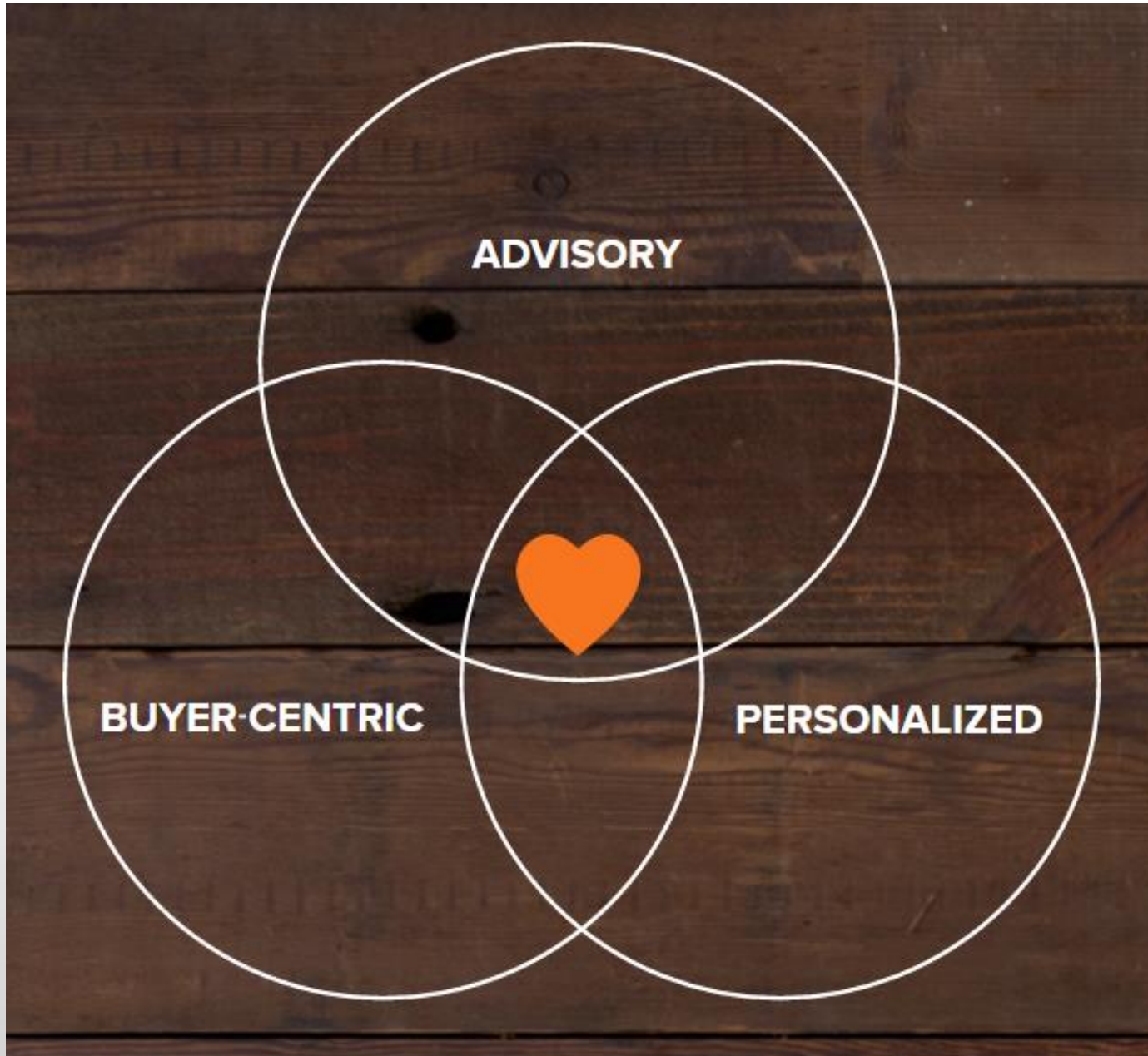
A set of repeatable steps your sales team takes with a prospect to move them from early stage to a closed customer

Examples:

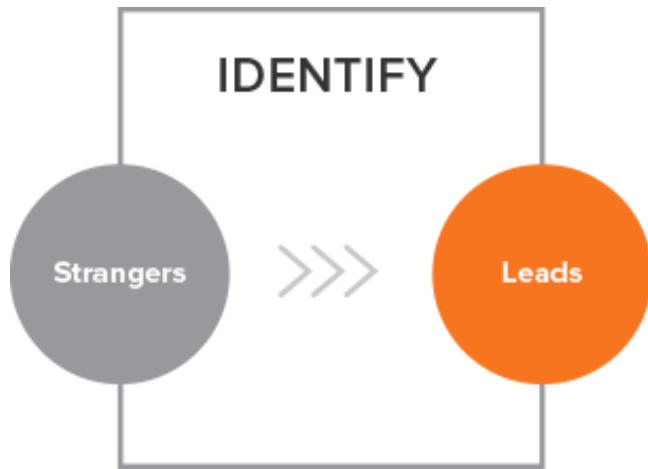
- Inbound Process
- SPANCO
- BANT
- MEDIC
- GPCT

The two philosophies that drive inbound sales are:

1. Inbound sales teams base their entire sales strategy on the **buyer rather than the seller.**
2. Inbound salespeople personalise the entire sales experience to the **buyer's context**



Identify



Researching and identifying leads that are active in the buyer's journey



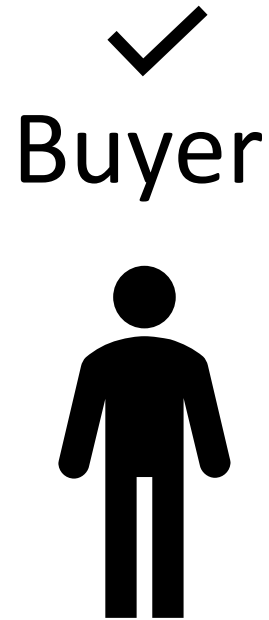
Identify >

Connect >

Explore >

Advise

Identify



Researching and identifying leads that are active in the buyer's journey



Identify >

Connect >

Explore >

Advise

Active over passive

Buyer



Inbound sales people
prioritise active buyers
ahead of passive buyers.



Identify >

Connect >

Explore >

Advise

Start with prospects showing signs of interest

Visits

Search for a visit

All visits

All saved filters >

All visits
721 visits

Options

Internet service provider is equal to False

Min Revenue is greater than or equal to 1000000

+Add filter

Save Reset

Manage Notifications

☆	...	...	1	1	29 Jan 2018
☆	...	...	6	4	22 Jan 2018
☆	...	...	10	10	19 Jan 2018
☆	...	...	1	1	9 Jan 2018
☆	...	...	3	1	28 Dec 2017
☆	...	...	188	128	20 Dec 2017
☆	...	...	2	2	14 Dec 2017
☆	...	...	7	7	14 Dec 2017
☆	...	...	2	1	12 Dec 2017
☆	...	...	3	2	12 Dec 2017
☆	...	...	4	4	8 Dec 2017
☆	...	...	17	10	23 Nov 2017

Identify > Connect > 1 Explore > 5 6 7 Advise 11 Next > 25 per page

Build off warm pathways that already exist

Visits

Search for a visit

All visits

All saved filters >

All visits
721 visits Options ▾

Internet service provider is equal to False

Min Revenue is greater than or equal to 1000000

+Add filter

Save Reset

Manage Notifications

Personal notifications Team notifications

Daily Email
Receive a daily summary of the companies in this view that visited your site

Revisit notifications
Get a notification when a company in this view visits your site

Save Cancel

1	1	29 Jan 2018
6	4	22 Jan 2018
10	10	19 Jan 2018
1	1	9 Jan 2018
3	1	28 Dec 2017
188	128	20 Dec 2017
2	2	14 Dec 2017
7	7	14 Dec 2017
2	1	12 Dec 2017
3	2	12 Dec 2017
4	4	8 Dec 2017
17	10	23 Nov 2017

Identify > Connect > Explore > Advise

Trigger events – other Sources of active buyers



We can reference these updates as trigger events to engage our prospects in **real** conversations.



Customize alerts to send real-time, daily, weekly, or monthly updates on whichever keywords are relevant to our prospects. We can use these to tailor our outreach.



Connect with prospects after they stop using a competitor's product to engage them while they're on the market for a better offering.

Identify contacts that are in engaged

< Back

Filtering on "All contacts"

Last page seen

☒ contains

Form submissions

☐ doesn't contain

☐ is known

☐ is unknown

Apply filter

Demographic

- City
- No. of employees
- Industry
- Annual revenue

Behavioural

- Email clicks/opens
- Social clicks
- Form submission
- Event attended
- Meeting booked

Frequency

- Number of visits
- No. of pageviews
- No. of submissions
- No. of events clicked
- No. of video views

Recency

- Last email open
- Time of last visit
- Recent conversion
- Became a lead date
- Most recent social click

Identify >

Connect >

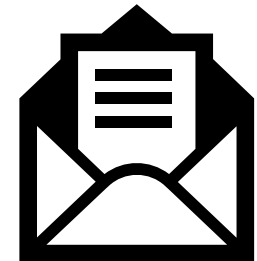
Explore >

Advise

Connect



Connecting with leads that are active in the buying process with personalised messaging.



Identify >

Connect >

Explore >

Advise

WE
AUTOMATED
THINGS!

EMAILS SENT
THIS MONTH

more emails & calls

usually doesn't equate to better

results.

PEOPLE
ENGAGING
THIS MONTH



Send Name: February Ema
Recipients: 253,977
Subject: See Our Febru

Instead of blasting out thousands of
untargeted messages in the hopes of
a few worthy replies...

Identify >

Connect >

Explore >

Advise

Choose a worthy starting point and tailor each message

New note Email Call + Log activity Create task Schedule

Templates Sequences Documents Meetings ▾

To caragh.kennedy (ckennedy@hubspot.com) Cc Bcc

From Vourneen Taylor (vourneen@aboutinbound.com ▾)

Subject Fixing problems and moving forwards

Hi caragh,

Thanks for taking the time to share a little about as well as the goals and challenges you face.

If you would like to learn how other companies are dealing with challenges like yours, I would be happy to schedule a call. We could also talk a bit more about your challenges and determine whether or not I might be able to offer some help.

If you would like to talk some more, please use this link to my calendar where you can schedule a mutually convenient time for us to speak.

<https://app.hubspot.com/meetings/vourneen>

Identify >

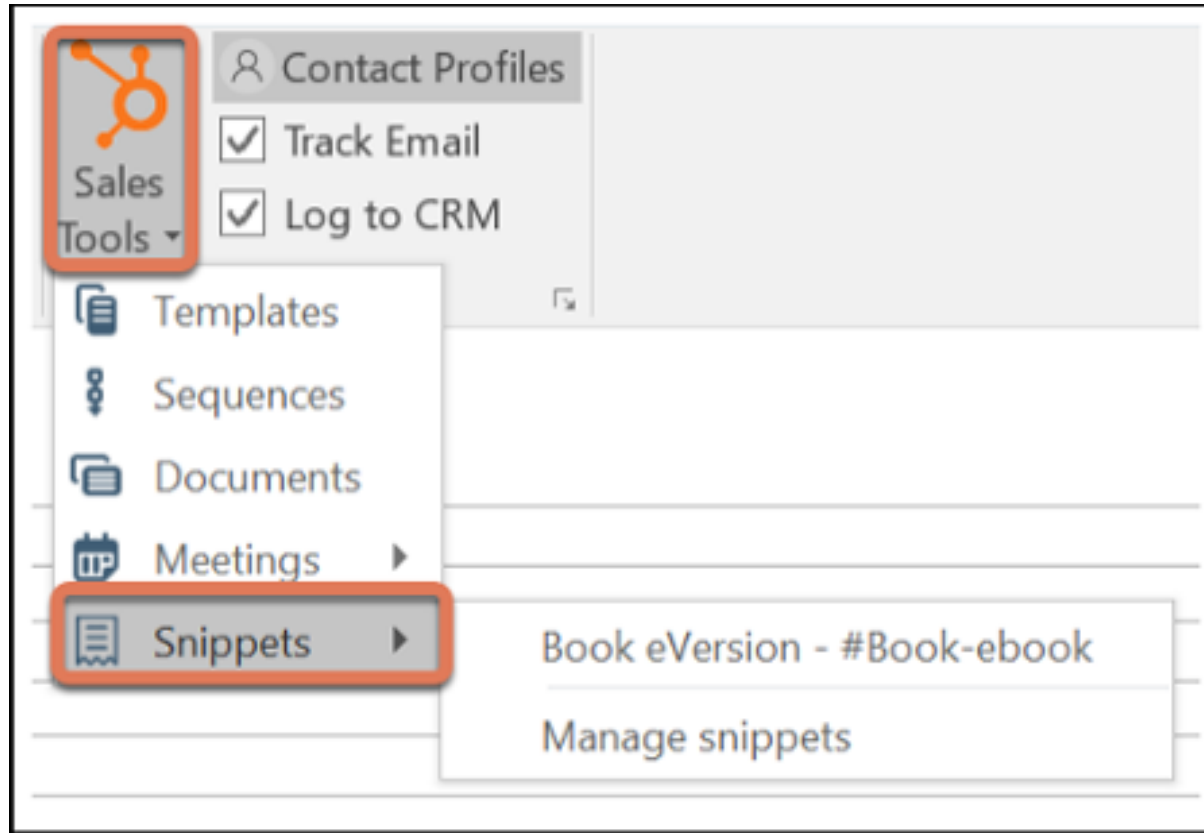
Connect >

Explore >

Advise

<https://app.hubspot.com/meetings/vourneen>

Use snippets within Outlook or Gmail to quickly add content and personalise your message



Identify >

Connect >

Explore >

Advise

Use sequences to engage leads

Initial touch

IF REPLY, TERMINATE SEQUENCE

[company] & HubSpot | Your recent download has me thinking...

Hi [firstname]

I'm reaching out for [company]

I schedule other similar

I have these couple new

Thoughts?

All the best

[salesforceownername]

If no reply, after 2 days send

IF REPLY, TERMINATE SEQUENCE

HubSpot & [company] | Marketing discussion

Hi [firstname],

You for

- D

- C

- N

No

our

I'm ins

Be

[sa

If no reply, after 2 days send

IF REPLY, TERMINATE SEQUENCE

Email buried?

Hi [firstname],

My intent is certainly not to be a bother. I've worked with many similar companies - I wouldn't be reaching out if I didn't think I could be helpful.

I have some ideas that I can explain in 10 minutes that can get help [company] increase lead flow in 2016. I can also share some case studies and valuable info on how you are stacking up to your direct competition.

For convenience you can easily schedule some time here: [sales_rep_owner_meeting_url]

Best,

[salesforceownername]

Explore

Explore qualified leads' goals or challenges to assess whether they are a good fit.



Use survey's to get more context before a call

To...	Vourneen Taylor;
Subject	About Inbound M
Location	Skype: vtaylorhub
Start time	Mon 15/01/2018
End time	Mon 15/01/2018

ABOUT INBOUND – Pre-project client survey

Let's talk via Skype so I can share my

To get us started I have created a pre

There are 8 questions in total and sh

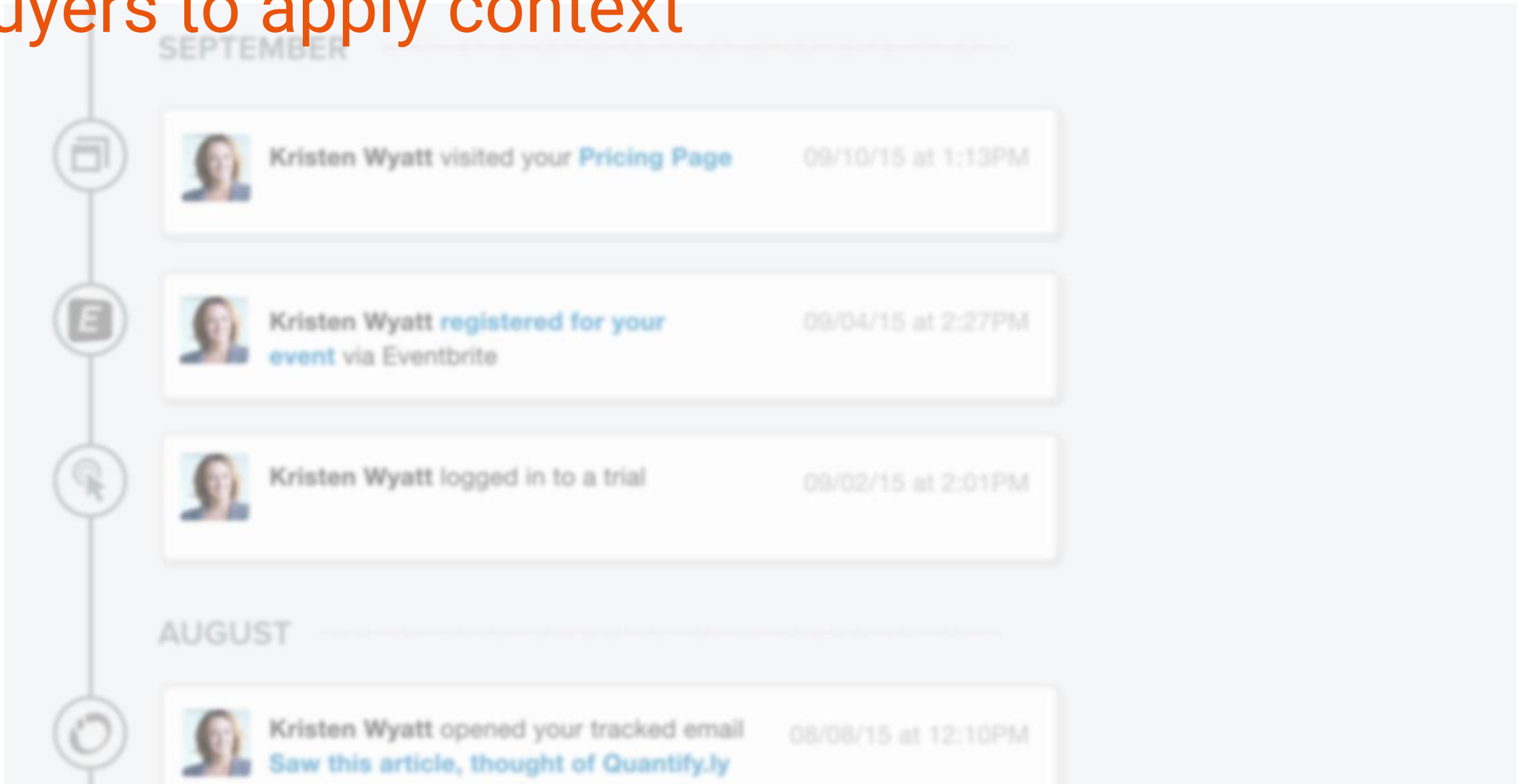
If you have any other material which

(If you would prefer me to call you le

- 1 What are the project deliverables? What do you need help with? e.g. website development, content strategy, training workshop, persona development, rebranding, conversion optimisation, consulting etc.

- 2 How will we know if we've been successful with the project deliverables? What is your <boss/board/colleagues> expecting from this engagement? What has failed previously with similar projects?

Use the tools that are collecting information on your buyers to apply context



Log notes and follow up after a call with helpful relevant content & clear next steps

New noteEmailCall+ Log activityCreate taskSchedule

Enter your task

Due Date
Tomorrow ▼Add a time



- Take notes & Log activity

- Use snippets to insert a call script guide

- Create a task as a reminder

- Schedule your next call with your prospect

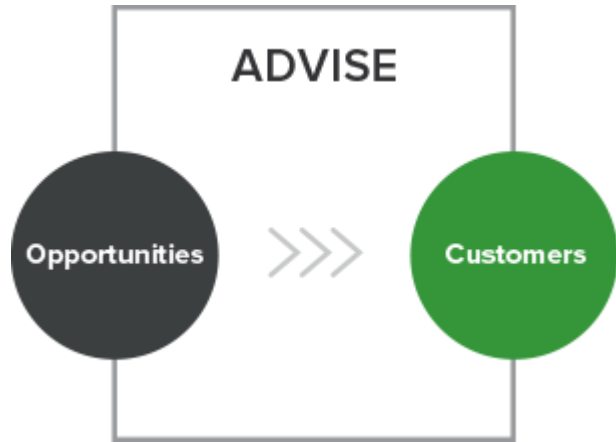
..... all from the same window!

B**I**U

TypeAssigned toEmail reminderQueue

To-do ▼Vourneen Taylor ▼The day of ▼🕒 08:00 ▼None ▼

Advise



Advise prospects on why your solution is uniquely positioned to address the buyer's needs.

Before you dive into a demo customise it to the buyers context based on what you've learnt



Sales: +353 1 512 4400 ▼

Get a Free Demo HubSpot's Marketing Software

See for yourself why 37,450+ customers from 90 countries trust HubSpot to bring their marketing team, tools, and data together in one place.

HubSpot's marketing software is everything you need to increase traffic, convert leads, and prove ROI – backed by a support team that helps you grow.

Yes, I want a demo



How can we customize our demo just for you? Drop me a note to let me know what you're hoping to learn about our marketing tools.

Listen for signs of interest to tailor the next step.

The screenshot displays the HubSpot CRM interface. At the top, a navigation bar includes links for CRM, Dashboard, Contacts, Companies, Deals, Tasks, Sidekick, and Settings. A search bar and user profile (hubspot.com, Hub ID: 250707) are on the right. The main content area shows a contact profile for Jackie Rivera. A modal window titled 'Jackie Rivera viewed content' is open, displaying a log of content views. The log includes a table with columns for content title and duration. The content viewed is 'Sales Methodologies for the Modern World' on 02/09/2016 at 3:25 PM EST. The log shows 13 slides in 00:01:17. The content is structured as follows:

Content Title	Duration
Page 1	00:05
AUTHORS	00:01
SALES PROCESS OR SALES METHODOLOGY?	00:01
1 INTRODUCTION	00:01
INTRODUCTION	00:00
INTRODUCTION	00:00
2 SALES PROCESS OR SALES METHODOLOGY?	00:02
Dave Brock, President, Partners In EXCELLENCE	00:07
Is there an ideal sales process?	00:07
Page 1	00:09
AUTHORS	00:01
SALES PROCESS OR SALES METHODOLOGY?	00:01
Page 1	00:36

Below the modal, a timeline shows a previous interaction on 02/17/2016 at 2:30 PM EST. A filter dropdown for the timeline is set to 'Filter timeline (11/27)'. At the bottom, a section titled 'Jackie Rivera was sent a tracked email...' shows a message: 'A few things before our meeting...'. A 'Show interaction' link is available.

Document deal stages in your CRM to keep on track

The screenshot displays a CRM interface for managing deals. On the left, a sidebar shows 'All deals' and 'Standard view' as the selected filter. The main area features a pipeline with five stages: 'Approved' (6 deals), 'Confirmed Member Co...' (34 deals), 'Documents Received, ...' (1 deal), 'Closed Won' (85 deals), and 'Closed Lost' (33 deals). Each stage contains deal cards with details like name, ID, value, and close date. A tooltip for 'Piper - 160004/162205' is shown over the 'Confirmed Member Co...' stage, displaying a value of \$5,000 and a close date of 11/30/2016.


Stage	Count	Deal Name	ID	Value	Close Date
Approved	6	Smith	161194	\$5,000	11/30/2016
		Haag	163048	\$14,000	11/30/2016
		Mefford	162921	\$5,000	11/30/2016
Confirmed Member Co...	34	Diaz	161504	\$3,000	11/30/2016
		Smith	160746	\$25,000	11/30/2016
		Barnes	161947	\$3,000	11/30/2016
Documents Received, ...	1	Piper	160004/162205	\$5,000	11/30/2016
Closed Won	85	Kovacs	160863	\$10,000	11/11/2016
		Kalil	158958	\$18,000	11/11/2016
		Shafik	162180	\$10,000	11/11/2016
Closed Lost	33	Nelson	152514	\$7,100	11/07/2016
		Sabetsky	158891	\$5,000	11/07/2016
		Quarles	159126	\$5,000	11/02/2016



Questions?

Slides & additional resources

Aboutinbound.com/HFS



ABOUT ▾BLOG

Book training

#1- Building a Sales Team & a Sales Process - 8 Feb 2018

Hubspot for Startups Onboarding Package

Only available for exisiting Hubspot Customers*

- ✓ Get set up on Hubspot in 1 day
- ✓ Get the skills you need to be successful
- ✓ Learn how to launch your first campaign
- ✓ Inbound Marketing & Sales starter kit
- ✓ Worksheets & resources to act as a roadmap for growth

Activity: Content library

Activity: Express call template

Activity: The Buyer's Journey

** minimum of 10 participants required*

€129 per person

First Name*

Company Name*

Business email*

Book Hubspot Onboarding for Startups

Edit rich text module

TOOLS & RESOURCES

- ✓ Hubspot for startups
- ✓ Google alerts

Hubspot for Startups Onboarding Package

Aboutinbound.com/HFS

Hubspot for Startups Onboarding Package

Only available for existing Hubspot Customers*

- ✓ Get set up on Hubspot in 1 day
- ✓ Get the support you need to be successful
- ✓ Learn how to launch your first campaign
- ✓ Inbound Marketing & Sales starter kit
- ✓ Worksheets & resources to act as a roadmap

* minimum of 10 participants required

€129 per person

The image displays three HubSpot onboarding worksheets. The first, 'Activity: Content library', includes a table for 'Popular content that sales reps use (or could use)' with columns for 'Content' and 'Goal'. The second, 'Activity: Explore call template', contains three steps: 'Step 1: Set the context', 'Step 2: Explore the challenge', and 'Step 3: Set the agenda', each with a 'Your idea' section. The third, 'Activity: The Buyer's Journey', features a diagram with five stages: IDENTIFY, CONNECT, EXPLORE, ADVISE, and DECIDE, followed by a 'Your idea' section.