The rise of sales operations

And the new collaboration imperative
Sales operations: This is your moment

As sales transforms from an instinct-led art into a data-driven science, the importance of the sales operations discipline has taken off.

Sales ops people have always been tactical problem-solvers —now they’re strategic leaders making a major impact on the revenue engine of the business.

Yes, the role is still evolving. And yes, it varies widely from company to company.

But in every large company we’ve seen, sales operations is expanding to touch more and more processes, while shaping new workflows, driving better policies, and delivering holistic data (and insights) across the entire sales cycle and beyond.

These are exciting times for sales operations professionals and the businesses that understand their power.
The research and advisory firm goes on to say that Sales Ops enhances an organization’s capability in seven key areas:

- Strategy and planning
- Sales intelligence
- Process design and management
- Support and administration
- Deal pursuit
- Technology
- Project management

That’s a lot of added value!
We’ll go out on a limb here. We’re convinced that the most successful sales organizations in the next one to three years will be those that invest most effectively in sales operations.

1. We believe this because we’ve met them and watched them work.

2. We’ve seen the caliber of their people, processes and technologies.

3. And we’ve seen how their ops leaders have earned a place at the top table.
More specifically, we’re convinced that the best sales ops teams are those that best help the sales organization collaborate—in all directions:

1. Internally—With all sales colleagues and managers working together, openly. From account execs, sales development, and operations people, to the SVP of sales.

2. With all other departments—Working more effectively with marketing, product teams, support, customer success, finance, legal and more.

3. With champions inside prospect accounts—Collaborating with the people who drive deals by working together to align stakeholders.
This 360° collaboration landscape is what this e-book is about

It makes a case for:

- The power of collaboration in sales
- The role of sales operations in making that happen
- Why legacy comms (mainly internal email) can’t support it
- Why integrated, channel-based collaboration can
“Sales continues to evolve from an art to a science.”

CSO Insights Study, 2018
The rise of data-driven sales

Data has revolutionized selling. It started with customer relationship management (CRM), but it's now critical to every aspect of sales and sales management. From engaging with prospects to tracking sales performance to planning, forecasting and team structuring.

*Data improves everything sales teams do—but today it’s locked in silos. Sales operations need a natural place to unite this data where conversations about opportunities happen.*

Increasing deal complexity

Selling to enterprise companies means selling to more buyers and bigger, cross-functional buying teams. It also means longer sales cycles with more hurdles and issues—business, legal, technical and regulatory.

*Sales teams need the help of more and more people across the organization to address all of this and keep deals moving forward. This just might be the most important thing ops can make happen.*

The fragmented sales stack

Sales teams are using many more applications and platforms than ever before for planning, prospecting, tracking opportunities, reporting—and working with finance, legal, revenue recognition, support and beyond.

*The challenge of uniting all of this in a coherent set of processes falls to the sales ops and sales systems teams. And you can’t do it just at the data layer. You need to orchestrate the people layer too.*

**Bottom line:**
It’s never been more important to improve sales performance and management visibility. But it’s also never been harder.
Email was designed for one-to-one communications, not for the intensive collaboration and organizational agility that today’s sales teams depend on. And the symptoms are familiar to all:

**Tangled threads**
Cluttered by reply-alls, excessive copying and blind copying.

**Knowledge is locked away**
Closed messages lock out many who would benefit from the conversation.

**Not widely searchable**
Users can search only their own message histories.

**No natural organization**
Just one big, dark pond of messages.

**Easily ignored**
The “internal spam” problem deters engagement.

**In short:**
Internal email is probably the least effective collaboration channel for supporting the new collaborative selling. But too many sales teams are still stuck with it.
A collaboration hub built around channels creates powerful advantages that email can’t match.

In the sales team, channels naturally emerge to support specific projects, programs, and initiatives. Team members join and leave them as they need to. Common sales team channels include:

- Account-specific channels
- Team channels
- Deal support request channels
- Triage channels
- Deal negotiation channels
- Sales ops channels
- Sales management channels
- Hiring channels
- Channels for the entire global sales organization

Channels change the fundamental dynamics of sales team communication and collaboration from:

- Mostly closed, isolated conversations to mostly open ones
- “Internal spam” to need-to-know relevance
- Information silos to a searchable knowledge asset
“Any time we win a new customer, we send a message to a Slack channel where we share details about who the customer is, why they bought and how we helped solve their pain points. Those learnings have been really important for all of our sales reps globally.”

Jeetu Mahtani, SVP of international operations, HubSpot

“I’m not going to email the entire sales team. But I’m happy to post in the sales Slack channel. Those are two very different things.”

Samantha Lutz, senior field account manager, Lyft Business
Email is individual-first.

Channels are team-first.
Integrating sales apps: Defragment your tech stack

Channel-based collaboration frees your sales teams from the constraints of internal email and makes transparency and knowledge sharing the default settings.

But when you then integrate this conversation center with your other sales software, a whole new way of working starts to emerge.

CRM is a great example. When you integrate your CRM (let’s say Salesforce) with your collaboration hub:

- Salespeople push updates to Salesforce without leaving the channel they’re in
- Anyone on the team can pull in account and opportunity status records
- Salesforce becomes a better system of record because it’s updated more
- Salespeople spend more time selling and less time on admin tasks
- The power of Salesforce spreads beyond its licensed users, giving every team the insight to coordinate around each opportunity

The same effect happens as you integrate with Google Docs, Zendesk, Drift, Troops, SalesLoft, Highspot, etc. There are more than 1,500 integrations in the Slack App Directory to choose from.

The idea is simple but powerful: Unite your sales tech stack, bringing data to (and pushing it from) wherever relevant conversations are happening.
Workflows: Automating your processes

The third piece of the sales collaboration puzzle is automation.

Once you bring your different sales tools together in the channels where they can make the most impact, it becomes possible to create new, automated workflows that cross apps and streamline processes.

As sales operations teams discover the power of integration and automation, they invariably start building new workflows for more and more processes.

Now we’ve graduated from channel-based collaboration to multi-step, cross-department workflows that bring in whatever sales software you’re using to streamline, accelerate and automate the work of sales.

This is the essence of modern sales operations.

An example:

An account executive wants approval for a non-standard deal.

She drops her request in the Deal Negotiation channel for that account, brings in the account status from Salesforce, and triggers the approval workflow.

Her boss gets pinged with the request, reviews it, and presses the “Approve” button right in the channel.

The approval status shoots back to the AE and moves forward to the next approver in finance. And so on until she gets a ping that the quote is fully approved and ready to release for signature.

The approval also triggers an update in Salesforce approval workflow status.
I’d rather be selling

The top 5 things sales reps say they spend too much time on

- Managing emails
- Logging activities
- Inputting sales data and notes
- Finding the right person to contact
- Creating follow-up tasks

1. “State of Sales,” 3rd edition, Salesforce
The visibility dividend

Automating everyday sales processes takes a lot of the friction out of selling.

But for sales and operations leaders, it also adds a new level of visibility. For the first time, managers can see for themselves what's happening on each account without asking people to stop what they're doing and craft an update.

And operations leaders can see how processes are working, how data is flowing, and where deals are getting stuck.

Collaborative selling is transparent by default.

“When asked to rank their priorities for improvement ‘Deliver key decision-making data to executives,’ topped the list for sales ops professionals.”

CSO Insights, 2018 Sales Operations Optimization Study
Collaborative sales ops in action

Five use cases we see all the time in Slack

“I don’t want to ask people to stop what they’re doing just to give me an update. Instead, I can drop into the right channels and see for myself.”

Bob Frati, SVP sales and customer success, Slack
Streamlined CPQ

Salesforce and Slack work together to:

- Standardize non-standard deal requests
- Automate approval flows
- Push updates to Salesforce
- Maintain compliance with corporate approval authority
- Get them to customers faster

Chad Thomas 10:13 AM
@Bruce Olson just a quick update. @Florence Garrett and I are making some progress with Edge Comm's governance group around getting them comfortable with our private cloud offering.  👍 However, they want some stipulations in our contract with them to give them additional protection. Can we do do this?

Bruce Olson 10:15 AM
@Chad Thomas can you share some of those stipulations with me?

Chad Thomas 10:17 AM
Here is a Word doc that has all the stipulations in it. Also, posting some info on the account itself for some context.

Salesforce 10:17 AM
Here are the details about Edge Communications:

- **Edge Communications | Account**
- **Account Owner:** Starchip Enterprise
- **Annual Revenue:** Jane T. Quirk
- **Industry:** Oct. 31, 2016
- **Stage:** Proposal/Price Quote
- **Amount:** $50,000
The collaborative deal desk

CRM and sales analytics integrations support:

- Weekly snapshot reports for managers and ops
- Pipeline visibility
- End-of-quarter prioritization
- Open requests that need approval

Lead converted!
Jane Smith (Acme Co.)
Owner: @Hubert

View Record
Answering deal support requests

Channels and integrations make it easy to:

- Loop in the right people
- Cross departments without email lag
- Use emoji to signal current status
- Trigger next steps with action buttons

Chad Thomas 11:21 AM
@Bruce Olson just a quick update. @Florence Garrett and I are making some progress with Edge Comm's governance group around getting them comfortable with our private cloud offering. However, they want some stipulations in our contract with them to give them additional protection. Can we do this?

Bruce Olson 11:24 AM
FYI, our exec sponsor reached out letting us know that he had a great conversation with the CEO last week. Looks like we have momentum @Florence Garrett can you reach out to CEO as a followup?

Florence Garrett 11:27 AM
That's great news @Bruce Olson! I think this would be a great opportunity for me to send an out to Samantha letting her know we are 100% committed to our partnership with them and to getting this deal done.
Unifying the sales stack

Defragmenting sales to help sales teams:

- Open a Jira ticket to put a feature request through to the product team
- Push a request into Zendesk for customer support
- Pull in customer insight from SalesLoft
- (All without leaving Slack)
Sales ops triage

You don’t just create processes, you maintain them too:

■ Collect queries in standard forms
■ Create tickets in your chosen app
■ Automate responses
■ Escalate to product or support teams
■ Build new workflows to solve problems

That’s a very quick sample of the many ways sales and sales ops teams use Slack to stay agile, minimize administrative tasks, and accelerate the processes that turn opportunities into revenue.

Read how Lyft Business uses Slack for mission-critical sales work.
Making sales operations more collaborative

CSO Insights breaks down the sales operations role into four main responsibilities. Here’s how integrated, channel-based collaboration can support each one:

**Strategic Planning Support**
Integrate insight tools for customer analysis. Collaborate in dedicated channels for compensation models and territories. Bring the right contributors into annual planning discussions, and more.

**Sales Performance Analysis**
Collaborate around forecasts. Bring in pipeline data from Salesforce. Share performance analytics. Evaluate channel strategies, and so on.

**Sales Readiness and Sales Cycle Support**
Share sales enablement tools and content in relevant channels. Set up a deal desk. Automate reporting and alerting. Automate RFP management. Improve responsiveness to deal support requests and CPQ processes, and so forth.

**Technology Management**
Operationalize your CRM strategy. Unify the sales tech stack. Manage new deploys and migrations. Triage requests. Set up handovers from marketing automation, etc.
The benefits of collaborative sales ops

Silos hurt every discipline and department. But for sales operations trying to boost efficiency, they’re fatal.

A collaboration hub shared across teams is the ideal environment for optimizing ops, with benefits accruing across departments and throughout the business.

Boost sales team performance
Streamline sales processes to win more deals faster.

Support more deals simultaneously
And prioritize the biggest, most imminent opportunities.

Improve management visibility and leverage
Spotting more opportunities to add value, with less intrusion.

Amplify the impact of sales operations
Serving the business better with automated workflows.

Deliver a better buying experience
With better-informed, more responsive reps.

Onboard new sales reps faster
And ramp to full productivity sooner.

Improve Salesforce accuracy
By making it easier to post updates.
“The better sales enablement formalizes its cross-functional collaboration efforts, the better the sales force’s productivity.”

Tamara Schenk, CSO Insights
Some metrics for ops people:


**Experience**

- **86%** of reps say Slack gives them better access to information in the field.
- **86%** Say it’s easier to share key learnings with Slack.
- **100%** Find Slack helps them better collaborate with non-sales teams.

**Outcomes**

- **25%** increase in potential deals won per year, per sales team member.
- **13%** shorter overall sales cycle.
- **21%** faster response time to sales lead.
- **25%** increase in potential deals won per year.

IDC estimate based on average metrics of sales organizations using Slack that participated in this study that include: 3% more deals in pipeline with Slack, 5% higher deal win percentage with Slack, and 13% less time to close deals with Slack.
Conclusion: Collaboration is an operations accelerator

As sales transforms itself into a data-driven discipline, the importance of sales operations can only rise.

We hope this e-book has convinced you that:

- Collaboration is central to operational efficiency
- Internal email is no way to support the 360° collaboration that sales needs
- Channel-based collaboration is better
- Integrating your collaboration hub with your sales tech multiplies its value
- Automating workflows where work conversations happen speeds everything up

Sound good? Check out Slack today to get started.
Dig deeper

More information on collaboration for sales and sales ops

Slack on Slack:
How channels power our sales team

The product summary:
Our solution page for sales

The sales-related integrations in the Slack App Directory

Customer case:
How Slack helped HubSpot scale

Customer case:
Mission-critical sales work at Lyft Business

Talk to someone on Slack's own sales team

LET'S GO
About Slack

Slack is a new layer of the business technology stack that brings together people, applications and data—a hub for collaboration where people can effectively work together, access critical applications and services, and find important information to do their best work.

People around the world use Slack to connect their teams, unify their systems and drive their businesses forward.