

A COMPREHENSIVE GUIDE TO SALES AUTOMATION



Table of Contents

Introduction

03

What is sales automation and how does the process work?

04

How does a sales automation software work?

05

Key features of a sales and marketing automation tool

06

Ending Notes/ Conclusion

08



Introduction

The digitized business environment presents sales professionals with unprecedented challenges. Having more time at hand translates into a higher number of sales. However, the challenge that global sales professionals are facing is the dearth of adequate time to push sales. Successful international brands have been prompt enough to embrace their **sales enablement platform** to foster more sales.

In this blog, we are going to talk about **sales and marketing automation tools**, and how they can streamline your sales processes. This way, you can benefit from an organized and smoother workflow.



What is sales automation and how does the process work?

Sales automation involves the deployment of robust software that can automate repetitive tasks to simplify the sales process. At the same time, **sales and marketing automation** software can ease up the buying experience for your customers. Some of the best sales automation tools come integrated with CRM software, email marketing software, and lead generation tools.

Currently, sales professionals stumble upon a wide array of digital tools to streamline their sales processes. These tools come with powerful features like lead generation, following up on queries of customers with automated emails, and managing sales activities of your team in a more organized way.

The best benefit of working on a digital **sales enablement platform** is that these tools free up your time for indulging in revenue-generating activities. Using a sales automation software, you can channel a higher number of leads to convert. This leverages the efficiency and productivity of your business.



How does a sales automation software work?

Regardless of the sophistication of your sales funnel, it would need a human touch. However, having the right **sales and marketing automation** tool can simplify the process significantly. According to research carried out by the McKinsey Global Institute, businesses can automate around 33% of sales operations. This statistic reveals the tremendous potential for sales managers to focus time back to their resources, while letting the tool automate their tasks. This would deliver you a more effective and leaner sales operation.

Deploying the right automation tools, sales professionals can craft a more hybrid sales experience. The tool would handle the designated tasks automatically. So, your sales team would be left with tasks that are more human-oriented. Here's a list of tasks that you can automate on a **sales enablement platform**.

- ▶ Talent management
- ▶ Forecasting
- ▶ Quota setting
- ▶ Lead qualification and identification
- ▶ Managing orders
- ▶ Following up inquiries
- ▶ Managing pipelines
- ▶ Managing analytics and sales reports
- ▶ Making sales calls



Based on the nature of your business, you need to determine the type of tasks you should automate. So, factor in the tasks that you are currently handling and try to automate them. Gradually, you can use your **sales and marketing automation** to simplify a greater number of tasks.

Key features of a sales & marketing automation tool

Sales automation tools work like digital assistants that can help you run through the recurring tasks without wasting human resources. Here are some of the key features of these sales automation tools.

1. Guidance and personal assistance

With a robust sales and marketing automation tool in place, you can guide your sales teams by providing them with updates regarding upcoming tasks. Therefore, automation tools can couple up as a guide and a personal assistance. Having one of these tools ensures that your sales teams would receive timely reminders and never overlook their priorities. As a result, your business would experience fewer missed opportunities.

2. Managing leads

As you expand your venture, you would have leads pouring in from various channels. With a powerful marketing tool, your sales department would be able to evaluate the lead's behavior automatically. With the manual approach, sorting the data and segregating high-quality leads would take several hours. By automating this process through software, you can get the segregation done in a few minutes.

Eventually, your sales team would be empowered with a curated lead list. In the process, the sales professionals would be able to convert more leads to customers.

3. Better engagement and communication

Automation tools can help you engage more clients and thereby increase the chances of sales. Right from chatbots to emails and scheduling tools, you can automate using the right tools. For sales professionals, the time at hand happens to be limited. However, customers expect your department to be responsive. By automating communication, you can pacify your customer interactions.

Even if your sales or customer support department is engaged with their respective priorities, your customers would be knowing that you are working on their inquiries. That's the reason why forward-thinking businesses are integrating AI-powered chatbots on their digital platforms.

4. Research and decision making

The age of digital transformation presents huge chunks of data to every business to harvest. A careful and methodical research on these details can help them draw valuable insights. Consider the information pouring in through social media channels and other platforms on the internet. Thanks to smart analytics on your sales enablement platform, you can tweak your sales strategies.

Successful sales managers largely bank on these automation tools to generate business insights based on past trends and the present data inputs. No wonder, why using an automation tool can help you spearhead your sales strategy.

5. Automated data entry

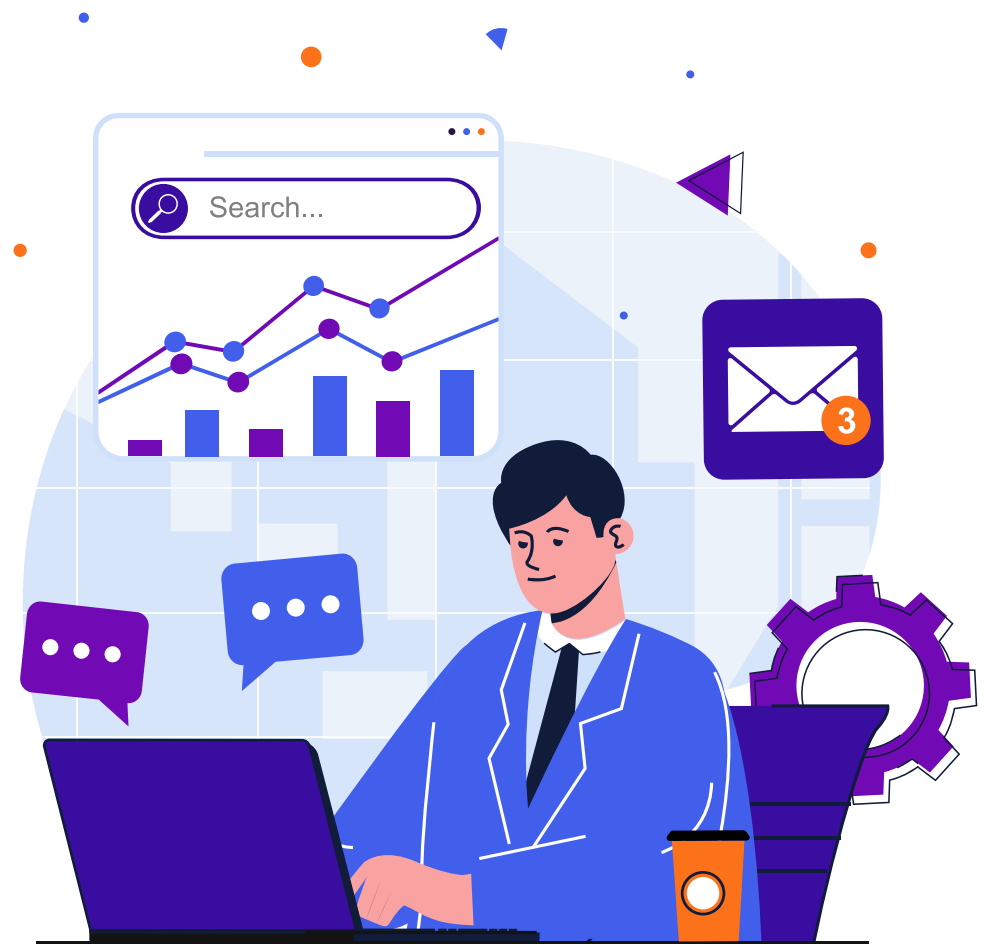
Entering data manually continues to be a tedious task. Eventually, it robs your business of valuable time that you could have used to manage other priorities. With the right tool in place, you can automate the data entry process. This ensures that all the incoming detail from your customers would be auto-filled into your database.

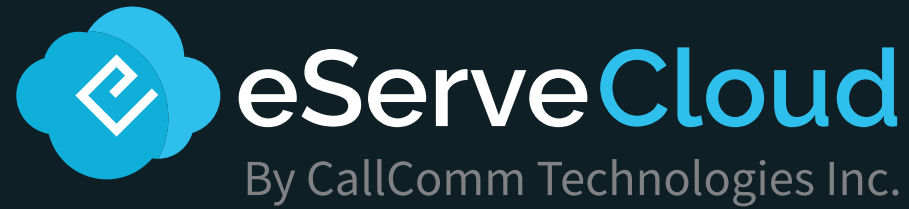



Ending Notes

One of the best reasons to use an automation tool is its potential to optimize the unique skills of your sales force. No wonder, why successful businesses are intelligibly deploying **sales and marketing automation** tools.

At the same time, these powerful instruments of automating your sales process would also help you maintain a clean workflow. By eliminating manual intervention in data entry, sales managers can eliminate the chances of error. Most importantly, you would be more informed on how your customers behave to your sales strategies.






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