

Best Practices for Aligning Inside Sales with Field Sales

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by Bob Apollo, Ellen Bristol, Mike Brooks, Michael Damphousse, Steve Richard

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Executive Summary

Keeping sales reps who work in the field on the same page with reps who work in the office can be a real juggling act. Sales managers must keep both inside and field reps focused and working together like a well-oiled machine, while smoothing over misunderstandings, miscommunications and frustrations. How do you promote a smooth and profitable working relationship between the two teams? In this guide, Focus Experts Bob Apollo, Ellen Bristol, Mike Brooks, Michael Damphousse and Steve Richard share their top 6 best practices for aligning inside sales with field sales.

After reading this guide, be sure to check out the entire discussion and join the conversation:
<http://www.focus.com/questions/sales/inside-sales-best-practices-what-are-your-3-tips-aligning/>.

Best Practices Checklist

1. Develop a common definition of your ideal customer.
2. Form an 'SLA' between inside sales and field sales.
3. Clearly define qualified sales opportunity and the hand-off process.
4. Eliminate destructive, internally competitive behaviors.
5. Get inside and field reps together in-person as often as possible.
6. Clearly map duties and roles to recognition and reward programs.

Best Practices for Aligning Inside Sales with Field Sales

Best Practices

1. Develop a common definition of your ideal customer.

"Align inside and field sales around a common shared definition of your ideal customer profile. Go beyond demographics to identify structural, environmental and behavioral factors. Incentivize inside and field sales to capture as much of this information as possible for each prospect and target account in the CRM system of record." (Apollo)

"You want all contributors to focus on identifying and then landing customers who look as much as possible like your Ideal Customer. So the various sales contributors are all working a piece of the sales challenge: Inside Sales is either generating demand within a target market that has potential to become ideal or doing after-market sales/service with existing customers to keep them as ideal; field sales account execs are cultivating the right customers, and so on. All customer-facing functions operate with an eye toward getting and keeping Ideal Customers." (Bristol)

2. Form an 'SLA' between inside sales and field sales.

"Form an SLA between inside sales and field sales. Include things like rules for rescheduling meetings and expectations for calling prospects within five minutes of filling out a Web form. Research shows that you want the inside rep to strike while the iron is hot. You are 21 times more likely to qualify a lead if you call within five minutes of a prospect filling out a form. This is clearly an alignment best practice." (Richard)

"Make sure inside sales and sales have an SLA between them that defines leads, what happens to leads, or other functions they share process with." (Dampousse)

3. Clearly define qualified sales opportunity and the hand-off process.

"Align inside and field sales around a common definition of what a qualified sales opportunity looks like. Establish hand-off points based on these criteria between inside and field sales. Pay careful attention to opportunities that are regarded as qualified by inside sales but rejected by field sales, and use the learning to refine the criteria and/or the process." (Apollo)

"The hand-off doesn't need to be a one-time event. Leads and/or opportunities can go back and forth between inside and field several times as is best-suited to the needs of the prospect. Field reps who are flexible about their qualification criteria end up with more at-bats with prospects that may not fit the bill now, but still have implicit needs that the field rep can develop in the meeting. Hand those back to inside for nurturing and you end up with a gem three months later." (Richard)

4. Eliminate destructive, internally competitive behaviors.

"Establish an integrated sales metrics and compensation plan that encourages constructive, collaborative behavior between the two teams. Systematically eliminate destructive, internally competitive behaviors that harm the best overall interests of the company." (Apollo)

5. Get inside and field reps together in-person as often as possible.

"Have inside and field meet early and often. I've noticed that there is a hierarchy of communication deterioration that looks like this: Face-to-face is the best, then video conferencing, then phone calls, then email, then IM, and the bottom of the barrel is cell phone text. I see tons of problems arise between field and inside sales when they only communicate over email and IM. So many issues go away when they have a chance to meet each other at least once a quarter. Partnerships tighten, collaboration increases and revenue goes up." (Richard)

"Get the teams together at least once a month. Many times the outside reps are too busy flying around the country/world meeting with clients and rarely spend much time at the home office. When they do, they usually are busy catching up and don't have time for the inside reps. Once again, it's easy for the inside rep to feel ignored or even discarded. Easy fix here: Have a bonus luncheon that combines both teams, and recognize the contribution of each." (Brooks)

"Get them together. Encourage them to build solid working relationships with each other." (Dampousse)

6. Clearly map duties and roles to recognition and reward programs.

"Define the compensation and, more importantly, the specific duties of both the inside rep and the outside account manager. I've managed too many teams of inside sales reps and heard petty complaints such as, 'I brought him the deal and he got all the compensation!' or 'That's his job to pursue it once I identify it.' And so on. Once again, petty, yes. Commonplace? Also yes. Easy to avoid? Yes, if the duties are clear in the beginning." (Brooks)

"Give proper (and consistent) recognition to the inside rep. Too many times, the glory (and compensation) go to the outside rep who closes the deal. But many times the hard work and perseverance it took to get to the right prospect and to develop rapport and proper qualifying goes unacknowledged (to the inside rep). This breeds resentment and, once again, petty grievances and creates an unproductive working environment. Put a solid recognition program into effect early on." (Brooks)

"Have comp plans aligned for both performance and similar long term goals." (Dampousse)

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