



# Next Generation Sales Operations

This whitepaper discusses how to elevate a sales operations function into a strategic business partner.



We are living in a changing world. Buying behaviours have changed. B2B sales have more decision makers than ever. Sales cycles are longer than ever. ‘Spray and pray’ marketing no longer works. 42% of buyers use social media for business purposes. Sales has changed – has your sales organisation evolved to support your sellers?

The role of sales operations continues to grow and evolve.

Back in the 1970s at Xerox, J. Patrick Kelly established a sales operations group to take on sales planning, compensation, forecasting and territory design. Kelly described his responsibilities as ‘all the nasty things you don’t want to do, but need to do to make a great sales force.’

Ten years ago, only the most advanced sales organisations had a distinct function and even a few years ago many had never heard of sales operations. At the same time, the science of sales operations is growing and new technology, new thinking and new buying trends means it is even more important to ensure your sales organization is properly enabled and supported.

### So, What is Sales Operations?

In recent conversations I’ve heard:

- Oh, that’s like, Salesforce.com stuff, right?
- Commissions, that’s not Sales Ops work, is it?
- Isn’t that sales management’s job?

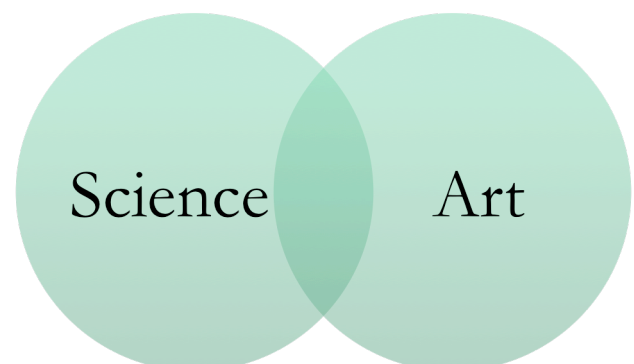
Sales operations looks different at every company. There are different levels of maturity, which I will cover, and there are also different levels of depth. For the purpose of this whitepaper I want to mostly focus on what sales ops looks like at its best.

### Reporting Lines

Most commonly, sales operations reports into the Head of Sales. At its best, sales operations acts as a Chief of Staff in the sales arena. Ideally this is a great partnership, where the Head of Sales relies on the more objective Sales Operations to review plans and raise potential pitfalls with new initiatives and plans. It should be a relationship full of trust and mutual support. This person should also be represented as a key part of the Sales and Marketing leadership team.

### Is Sales a Science or an Art?

Sales is both a science and an art combining process, analytics and proven trends with experience and intuition. Sales Ops can help bring a rational objective side to your sales organisation.



Sales operations is a complex role blending tactical and strategic work. Some key activities and functions are as follows:

### **Strategy**

Sales strategy should be a joint activity between sales, marketing, and product. Since there are multiple parties, sales operations can be an excellent place to own the sales strategy governance. Sales ops can also be an excellent sanity check to review the go-to-market model for potential areas of friction and to ensure all components are aligned. As sales operations is so close to the sales analytics, it is in a great position to spot patterns and make strategy adjustment recommendations.

### **Sales Team Organisation**

Setting up sales to succeed is a key part of the sales operations role. This includes staffing plans, hiring criteria, territory management, quota setting and incentive design and operationalisation. This also includes working with marketing on topics such as lead plans and refining who does what in the lead handling process.

### **Business Excellence**

Maintaining a regular cadence of reliable activities is a key part of the backbone of sales operations. This starts with setting up, and then constantly refining, processes, a regular schedule of communication to sales and lastly governing through an 'inspect what you expect' policy.

Key processes include lead handling, forecasting stages and rollout cadence, logging account activities and interactions, expedited quoting and deal approvals, and timely incentive calculations.

While sales data is used for forecasting and commissions payments, it can also reveal valuable trends and it is sales ops' role to both design metrics to capture key intelligence

Sales 2.0 is a combination of the data, science, metrics and predictability that inside sales has always been known for combined with the art of really getting close to our customers and understanding what they are facing in their business.

Anneke Seley  
CEO and Founder of Reality Works

Why has it taken nearly 40 years for sales analytics to become widely accepted as an essential sales management tool?

Neil Rackham  
Author of SPIN Selling in his forward for The Power of Sales Analytics

as well as produce actionable data with recommendations. To improve forecasting accuracy, sales ops can also add value to be predictive based on trends and behaviours.

### **Training and Talent Development**

In many organisations, this is known as sales enablement or sales capability development. To me there are two distinct activities – training and coaching.

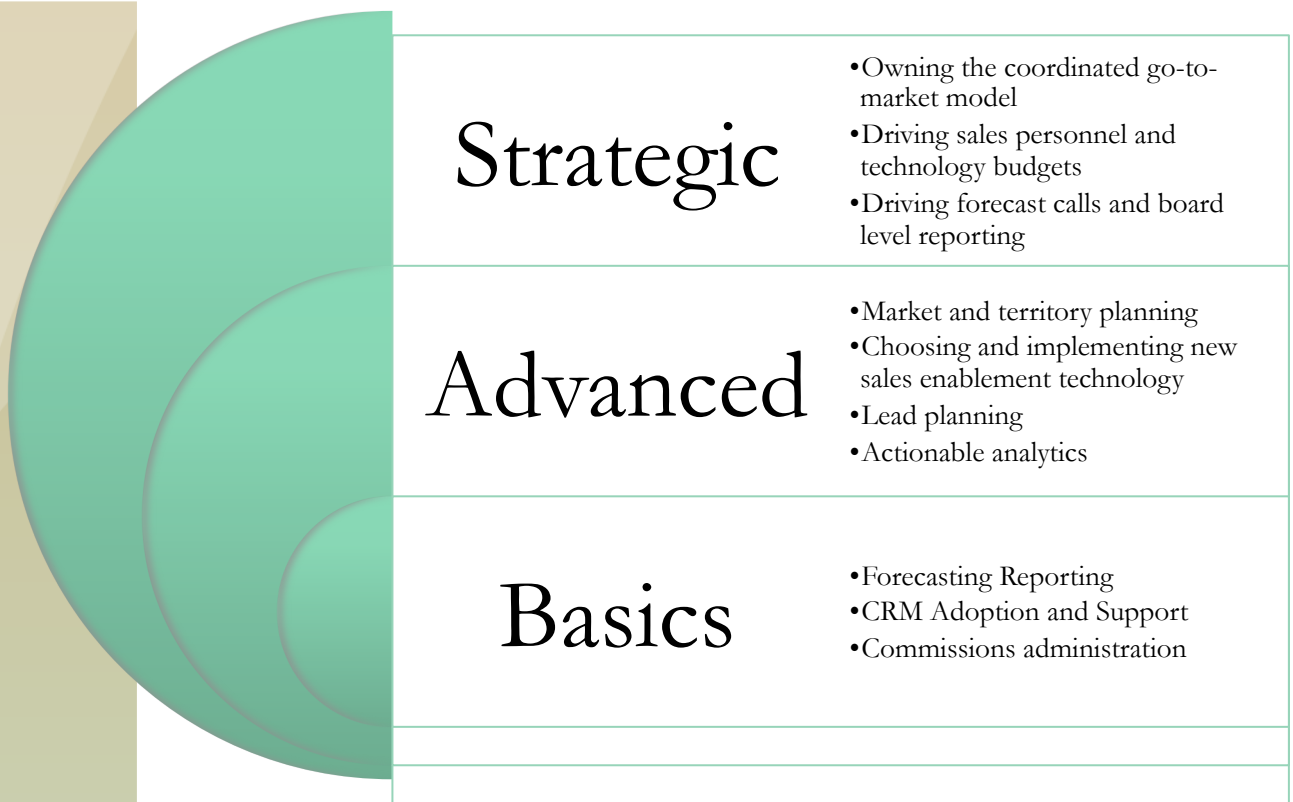
On the training side there are four main topics - market, product, sales methodology, sales tools. This includes both new hire as well as on-going education. On the coaching side the audience can be sales individuals or sales managers and it can be at a skills level or at a deal level. Both training and coaching should leverage and repeat best practices.

### **Execution and Efficiency**

Sales operations should always be working to ensure sales teams are as efficient as possible.

CRM should be as frictionless as possible and sales ops should be spending as much time making the CRM a one-stop shop for content, tools and information to simplify everyday activities as it does governing data quality. It is important to also keep it simple and not overcomplicate.

On the topic of efficiency, anything to help shorten the sales cycle is game. Some examples include enabling sales with reusable material (scripts, emails, presentations), automating or improving the quoting or approval process to get proposals out the door faster, or making the process of responding to RfPs easier with more reusable content. This is often why the bid proposal or deal desk sits within sales operations, to ensure a constant cadence of improvement while serving its internal customers.



The illustrative graphic above shows some examples of the different levels of sales ops maturity.

The true value of sales operations comes when it is empowered to act as a strategic partner and business driver. Often in an immature sales operations organisation, the activities can be quite administrative and centered around support ‘after the fact’. As the sales organisation matures, and the sales operations organisation alongside it, sales ops should start moving to the front of the planning process and own the end to end sales support. Sales ops really adds strategic value where it is providing actionable analysis to shift the business in the right direction. Sales ops is closest to the data and owns the responsibility to bring issues to management’s attention. Simply raising problems is not enough; there must be a solution to improve.

### Staffing

Occasionally, where regional staffing cannot justify a full head count, sales operations responsibilities are combined with more junior administrative support (not listed above). This includes tasks such as liaising with finance functions, chasing client signatures, booking conference rooms, etc. However, when combined, it should be very clear the priority must always be the operational tasks to drive the business, with administrative filling in the gaps.

Now that I’ve described what is not sales operations I wanted to talk about staffing the sales operations practice. Clearly different levels of maturity will require a different seniority and skill set. However, there are characteristics that all successful sales operations personnel will possess. Sales Ops Help can help you with detailed role profiles and characteristics.

- **Flexibility** It is hard to define a ‘typical day’ in the life of sales ops and therefore individuals need to be ready to shift gear at any time and juggle different tasks.
- **Always thinking ‘How Can This be Easier/Faster’** Successful sales operations individuals stand out as they are always looking for repeatable, sustainable and economical processes. This has a huge effect on productivity. No sales manager will be thrilled with a great report that takes half a day to produce every time.
- **‘Sales First’ Mindset** Individuals must evaluate each decision to ensure their actions make sales lives easier, faster, and/or better.

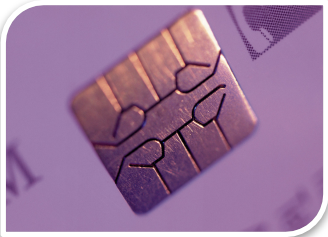


There are a number of ways that Sales Ops Help can work with you on this journey



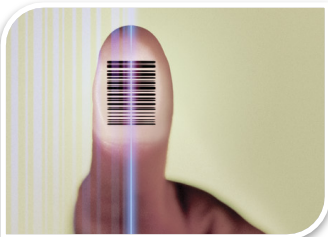
### **Benchmarking**

Understanding where your business is on its sales ops maturity journey and 'what good looks like' using various industry statistics and best practices.



### **Technology road mapping**

Its not just CRM anymore. There's a wide range of technology to improve your sales productivity including RfPs, quoting/proposals, monitoring usage for SaaS products, commissions, predictive analytics, etc. Its key to strike a balance and ensure tools are increasing productivity but not over-burdening your sales organisation.



### **Advanced KPIs**

Sales Ops Help can work with you to design metrics to spot problems long before they happen. The key is actionable data rather than data that looks in the rear view mirror.



### **Sales Planning**

Sales need solid planning to start the year. Market analysis, conversion assumptions, territories, lead plans including by channel. If managers only have one metric (sales) to measure their reps performance it is hard to spot problems early and course correct.



### **Data Analysis**

With so much information out there, learn about tools to help you manage and make sense of your data including various options to visualise data and predict trends.

# Learn

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or follow us on Twitter at SalesOpsHelp



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