

SOCRATIC SELLING SKILLS®

for Salesforce.com® Users

Case Study

BACKGROUND

A publicly traded investment management company transitioned to a highly customized instance of Salesforce® within the past year. Company sales representatives had participated in an intensive one-day Salesforce® training program that focused on basic concepts and use of the CRM. Knowing that the company could receive more benefit from their CRM, Communispond invited them to participate in the Socratic Selling Skills® for Salesforce.com® Users program. The company agreed as they were ready to increase their activity and accelerate sales.

BUSINESS CHALLENGE

Communispond met with the company's sales leaders to discuss current challenges within their sales environment. Unlike most sales training solutions that attempt to narrow the focus to process, CRM, or selling skills, the integrated nature of the Socratic Selling Skills® for Salesforce.com® Users program allowed the company to explore all these areas within the comprehensive intake process. The company listed the following initial challenges within their sales ecosystem:

- Enabling their teams to increase their productivity within Salesforce®.
- Further exploring how Salesforce® could facilitate sales.
- Reinforcing the use of Salesforce® in their teams.
- Viewing customer-related activity across teams and preventing duplication of effort.

During the program, the sales representatives added the following goals:

- Develop more sales and opportunities.
- Be more efficient using Salesforce®.
- Effectively log activities and opportunities.
- Learn tips to use Salesforce to help sell.

SOLUTION

Communispond engaged with the company through an intake process to gain the information needed to deliver a program tailored to the company's needs. The focus of this consultative session allowed the Communispond Facilitator to have a firm understanding of the company's sales process, their instance of Salesforce®, their sales challenges and opportunities, and the expected outcome for the program. Socratic Selling Skills® for Salesforce.com® Users was tailored to these inputs and was delivered over a three-day period.

The integrated sales acceleration training solution began with the leaders attending the one-day Socratic Selling Skills® for Salesforce.com® Leaders course, which established the foundation for the program, taught new skills related to management's use of Salesforce®, and ensured that the skills learned in the Socratic Selling Skills® for Salesforce.com® Users course would be reinforced in the workplace. The company's sales representatives then participated in the two-day Socratic Selling Skills® for Salesforce.com® Users course. This course, like the Leaders course, was tailored to the company's existing sales process while teaching best practices for using Salesforce® to facilitate the sales process, and not just record activity.

RESULTS

After the three-day intensive course, both sales leaders and representatives were pleased with the immediate benefits from the course. Not only did they develop leads and drive opportunities during the program itself, they gained a better understanding of their sales process and how it relates to their own instance of Salesforce®. They also learned specific selling skills that would help them to accelerate sales.

On the post-class evaluation form, participants gave the Socratic Selling Skills® for Salesforce.com® Leaders course an average score of 5 (on a scale of 1 to 6, with 1 being poor and 6 being excellent). Participants agreed that all of the stated course objectives were met.

On the post-class evaluation form, participants gave the Socratic Selling Skills® for Salesforce.com® Users course an average score of 5.8 (on a scale of 1 to 6, with 1 being poor and 6 being excellent). Participants agreed that all of the stated course objectives were met.

Participants added these comments to their evaluation forms:

“Very helpful to develop a plan around selling. Each section provided step-by-step instructions on breaking down process to be most effective. Thanks!”

“This course is well organized and well balanced. It is not just ‘shortcuts for Salesforce®;’ it is a comprehensive two-day class on selling. The instructor was a superstar!”

“I am new to sales so this was awesome. Put me out of my comfort zone and taught me a ton. I highly recommend this. The instructor is ‘the man.’”

“Very well done and a lot of fun. I’m glad I attended.”

“The instructor was wonderful. The course was very helpful.”

The company’s sales team is now integrating these newly learned skills into their daily activities, developing more leads, and identifying ways to speed up sales cycles.

NEXT STEPS

As a result of a successful pilot run, the company is planning to roll out the program to other sales teams within the organization. The company sees how the near-term benefits will soon be outpaced by the long-term benefits this program will bring to their sales organization.