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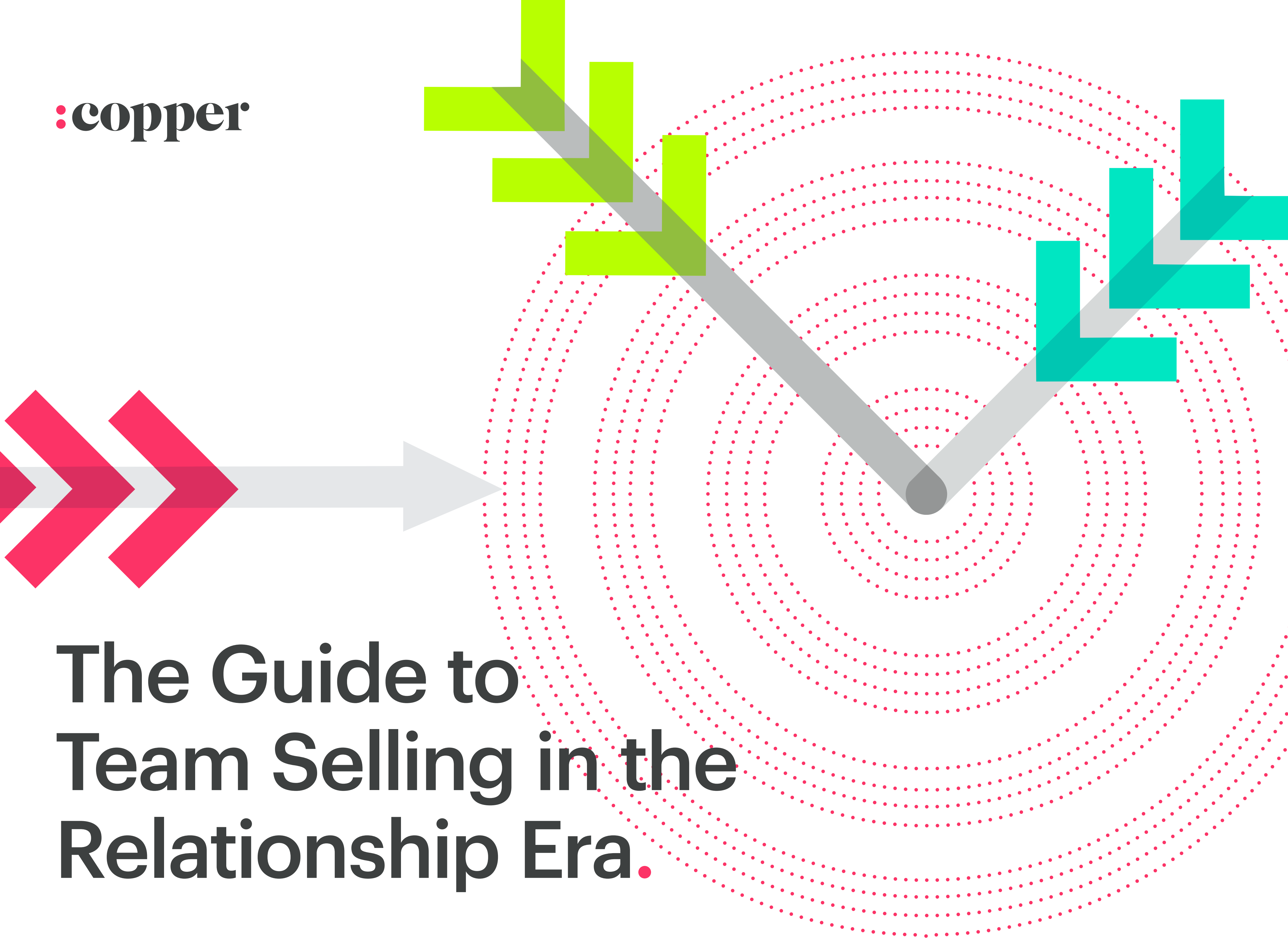


The Guide to Team Selling in the Relationship Era.

CHAPTER 1

A Brief-ish History of Team Selling.

If you've downloaded this ebook, you're probably interested in learning more about team selling and how to improve your team's collaborative selling skills. (Don't worry, we'll get to that.)

First, let's look at how businesses typically approach team selling and how the impact of team selling has been measured so far.

The idea of "teamwork" in sales has always been somewhat dubious—traditionally, the stereotypical salesperson has been someone who operates and wins deals through heroic solo efforts—and their experiences of work-place isolation are well documented.

Today, we ask if introverts are actually better at sales.

So, is sales really—and should it be—a team sport?

How *did* "team selling" go from just a casual buzzword to an indispensable strategy for modern sales teams?

Team selling: the new norm?

Regardless of the (mostly outdated, often inaccurate) salespeople characters we see in stories and on the big screen, team selling is widely regarded as a key part of the sales process today, especially as we enter the Relationship Era.

The Harvard Business Review (HBR) has written prolifically on team selling and the importance of collaboration at every stage—not just closing. Working well together during the early information-gathering stages is crucial as well: "the value of all of that shared information increases dramatically as more and more reps opt in to learn and, in turn, share with one another."

More evidence that information sharing is an effective component of team selling: the HBR worked with a company that implemented a social networking platform for its sales reps; the goal was to facilitate the sharing of information about big accounts. "In the few years since the system has been in place, cross-sales have increased, cycle times have declined, and conversion rates have gone up."

Individual achievement is no longer as important to business profitability as it once was.

Once upon a time, “superstar employees had an outsized impact on business performance—one person’s success could, for better or worse, be directly tied to the company’s bottom line.

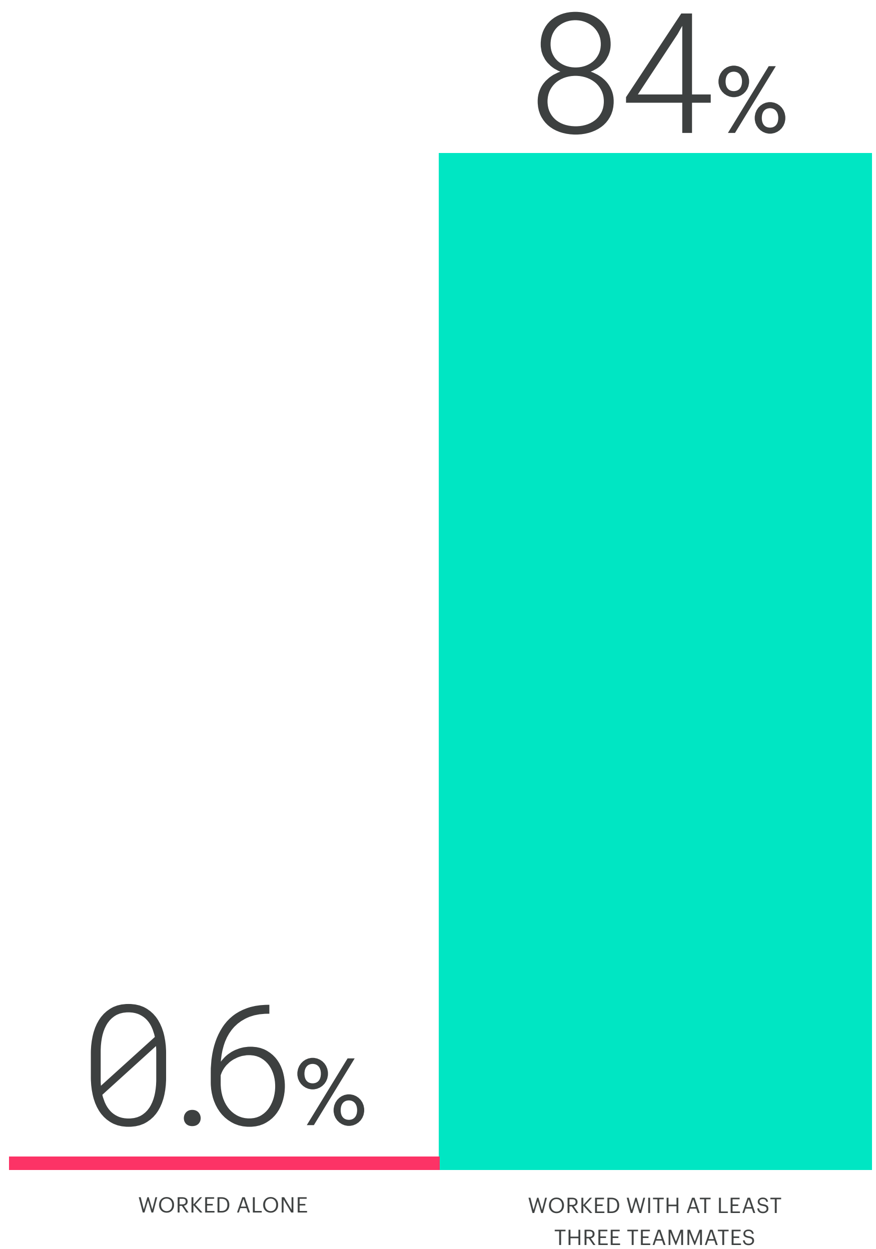
But between 2002 to 2012, things started changing.

The impact that individuals had on profitability went down on average from 78% to 51%. On the other hand, the impact that their “network performance” (aka. how much people give to and take from their coworkers) had on profitability *increased from 22% to 49%*. In other words, the impact of one person’s effort is almost the same as how well they work as part of a team.

In a survey of over 2,500 global business professionals and leaders, Copper’s CRM Benchmark Report found that on average, over 84% of respondents worked with at least three teammates to build and manage customer relationships. Only 0.64% of respondents worldwide worked alone.

(Significantly, over 19% of respondents from France worked with *11 or more teammates* to manage relationships.)

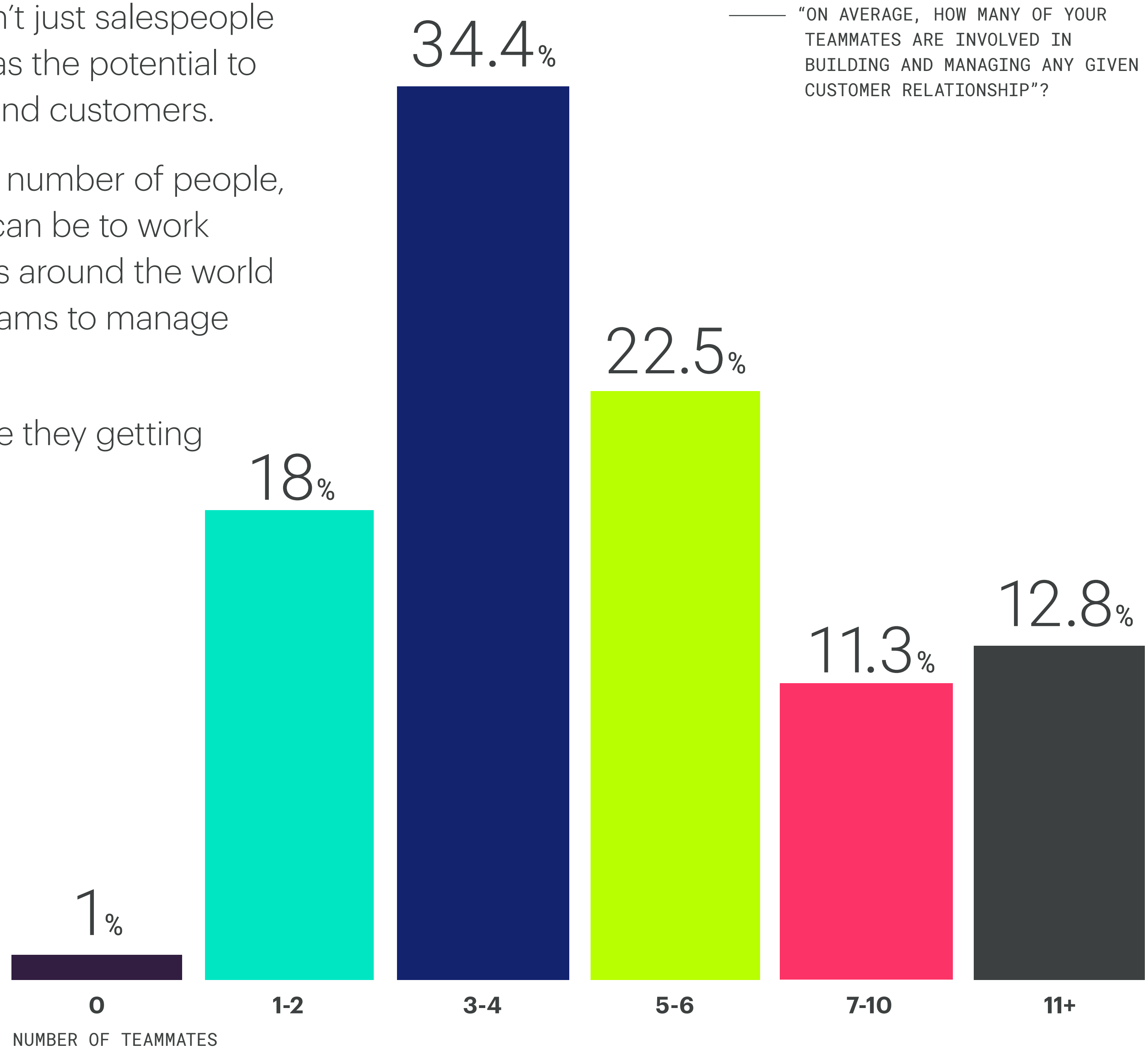
AS A PROFESSIONAL AND/OR LEADER, HOW MANY TEAM MEMBERS DID YOU WORK WITH TO BUILD AND MANAGE CUSTOMER RELATIONSHIPS?



Relationship-makers aren't just salespeople anymore—every team has the potential to interact with prospects and customers.

Of course, the larger the number of people, the more challenging it can be to work efficiently. Yet businesses around the world are still involving large teams to manage customer relationships.

So, what kind of value are they getting out of team selling?



Many business professionals work in large teams to manage relationships.

CHAPTER 2

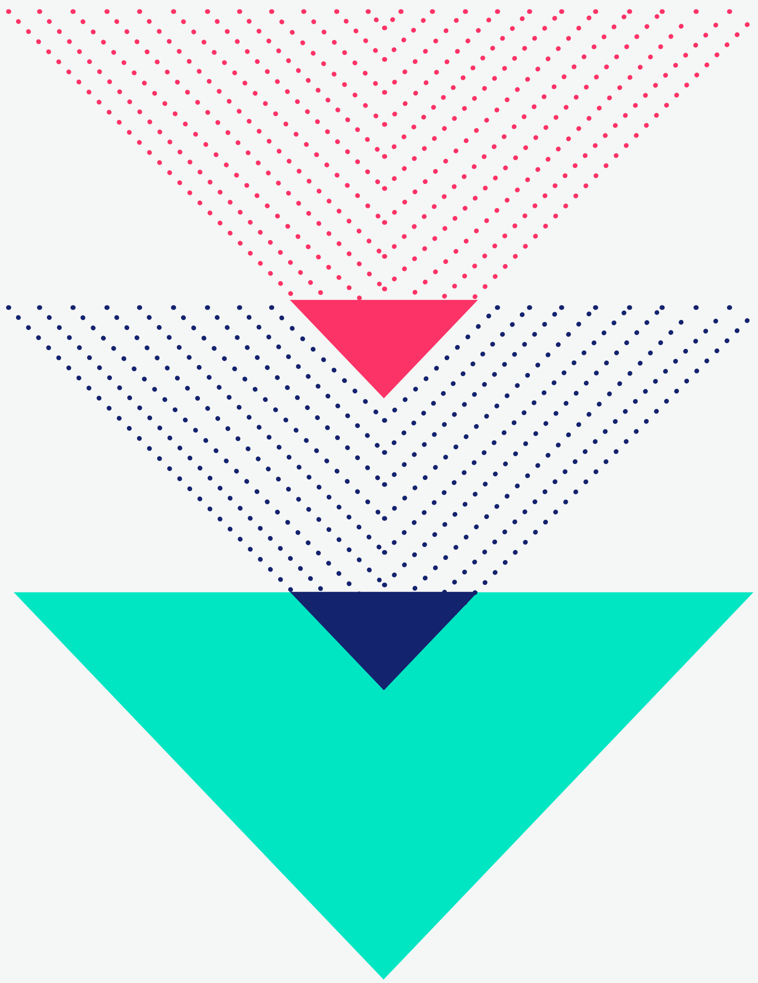
The Value of Team Selling

(aka. When is Team Selling Essential?)

Conducted in collaboration with Qualtrics Research, The CRM Benchmark Report noted above found that a huge variety of teams play a role in moving customer relationships forward.

As expected, Sales, Marketing, and Business Development were most heavily involved, but respondents reported collaborating with Operations, Customer Success, Engineering and Product, Finance, HR, and Legal teams as well.

Let’s look at the cases in which it would be useful to involve multiple teams.



1

As an alternative to discounts

Offering discounts is a classic move to complete those hard-to-close deals that seem to be going well—up until the point when it’s time to sign on the dotted line.

It’s straightforward and often, it works. But what if you didn’t have to slash (or gently cut) your prices?

If you know your prospect well enough, you should have an idea of what they might be interested in learning about (like branding, retail strategies, conversion optimization, or design.)

And if you’re lucky enough to have an influencer or someone with serious subject matter expertise on this topic at your company, offering access to their time and knowledge could be the perfect strategy to get an almost-customer to take out the credit card.

(Obviously, check with them first to make sure they’re willing to offer their services.)

Not only will your customer feel like they got an exclusive package, you’ll also get to keep those profit margins.

Win-win.

2

Whale hunting

A whale in sales is a prospect that's 10+ times bigger than your average customer.

When you're dealing with companies that are larger than yours, it's definitely unwise to try to do everything yourself. Closing a larger enterprise businesses often requires multiple skill sets.

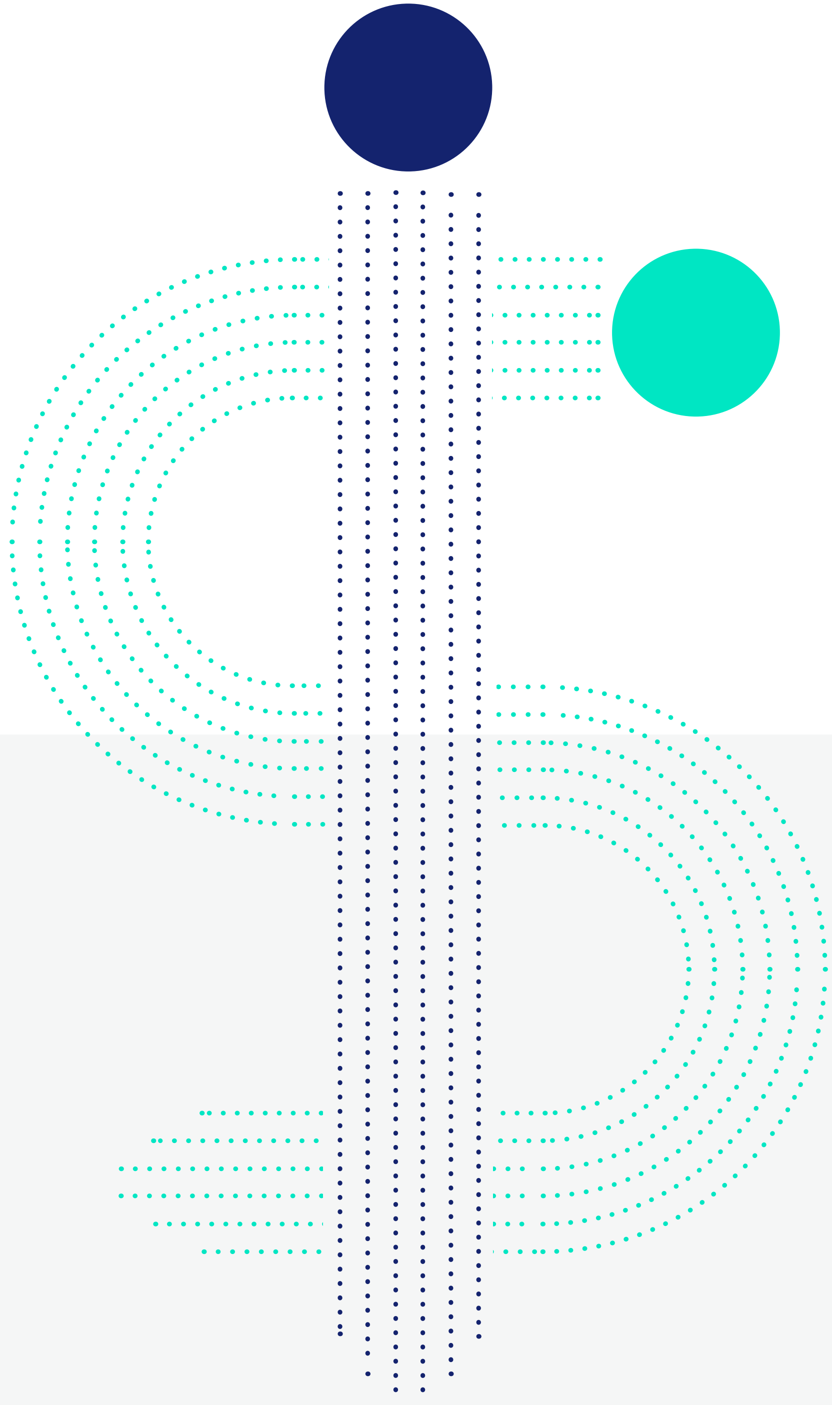
Will your prospect want to dig into the technical aspects of your product? Then you'll need someone from the Product team—who's ideally also friendly and good at explaining difficult concepts in clear, concise language.

Is there marketing material that could help explain certain features? Probably best to loop in the Marketing team.

How will you answer security and compliance questions? Time to have a quick chat with Legal.

Closing a whale could be huge for your bottom line—but first, you have to put in the work and collaborate effectively to sell them on all aspects of your product or service.

3

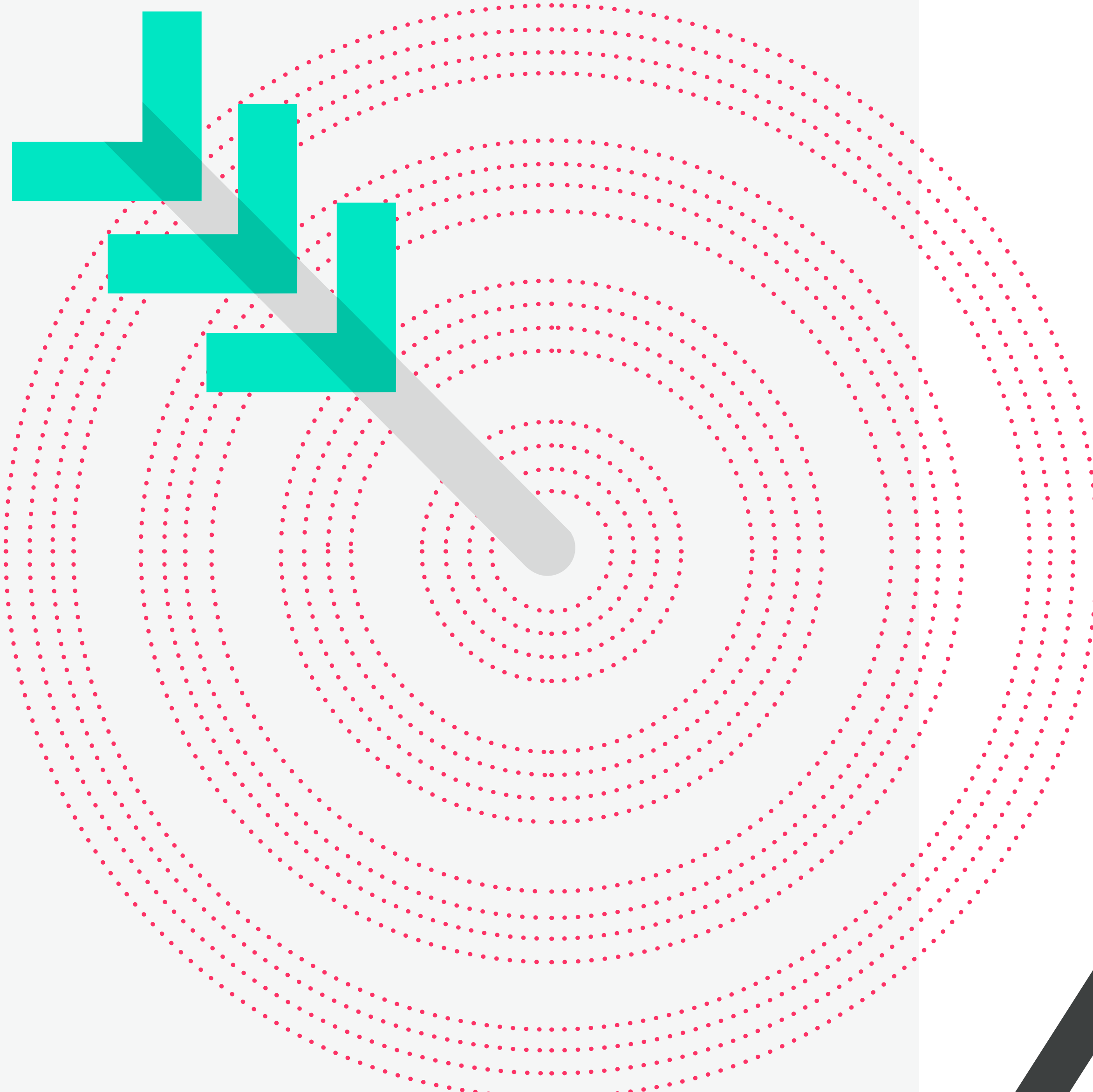


Quick(er) wins

It's that time of the month. You need to hit quota. Quickly.

One way to speed up the sales process might be to anticipate questions from your prospect and have a plan ready. Whether you're planning to get the answers yourself or set up meetings between your prospects and IT (or Legal, or Customer Success,or whichever teams would need to provide input) before even being asked, be as proactive as you can in getting everyone onboard.

This is especially important if you know that other teams might be busy during this time; you'll need to book their time well in advance to make sure that you have the information you need ready before meeting with your prospect. If everyone's clear on their roles and you can get them collaborating, it could speed up the process and help you go from pitching, to addressing obstacles, to closing—much faster.



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When the competition heats up

The more ambitious your targeted prospects are, the more competitive it’s going to be—not only in terms of how many competitors you’ll be coming up against, but also the due diligence that will be performed on your company. Your prospects will be doing their homework.

Product expertise is important, but if you have any teammates (not necessarily on the Sales team) who have worked for that prospect’s competitor before, they might know of a unique angle that you can take advantage of. Even teammates who’ve had different experiences with that particular industry will have valuable knowledge—but you won’t know until you ask.

Difficult selling situations are often the ones where your least-obvious connections will have the most value. Sometimes, looking beyond the Sales team will reveal underlying insights that no one—not even your competitors—will think of.

5

When (literally any) roadblocks pop up

Whenever you encounter an obstacle (and they come up often), going at it alone is probably the least efficient—and least effective—way of overcoming the challenge.

Use the experience and knowledge of other people, on both your team and other teams, to look at obstacles from different angles and come up with more creative solutions. Two heads are better than one, but if you can get five (or 10) people brainstorming ideas, even better.

CHAPTER 3

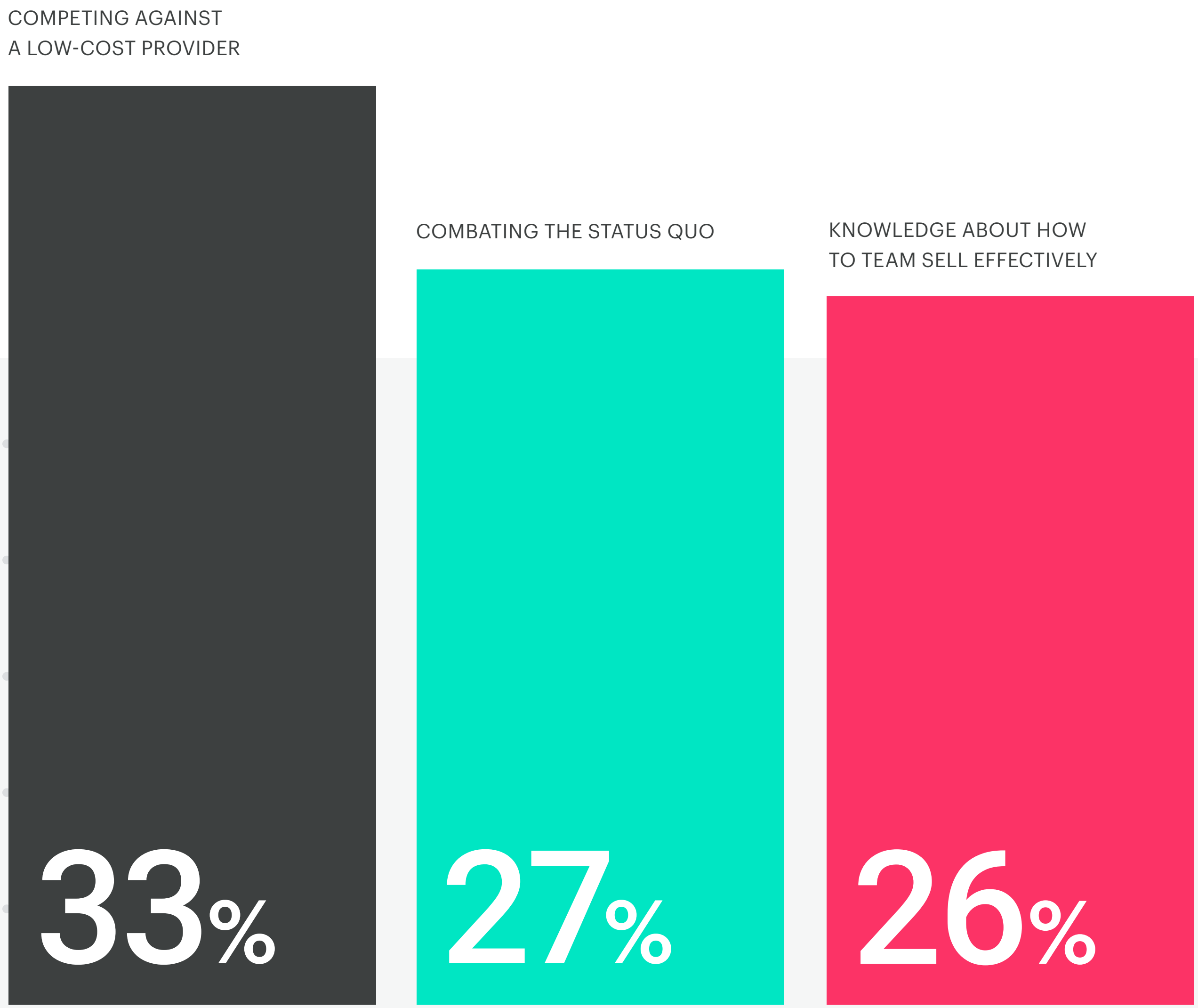
Key Components to Successful Team Selling.

The concept of team selling is still relatively new, so it's not a surprise that businesses haven't really figured out the formula yet.

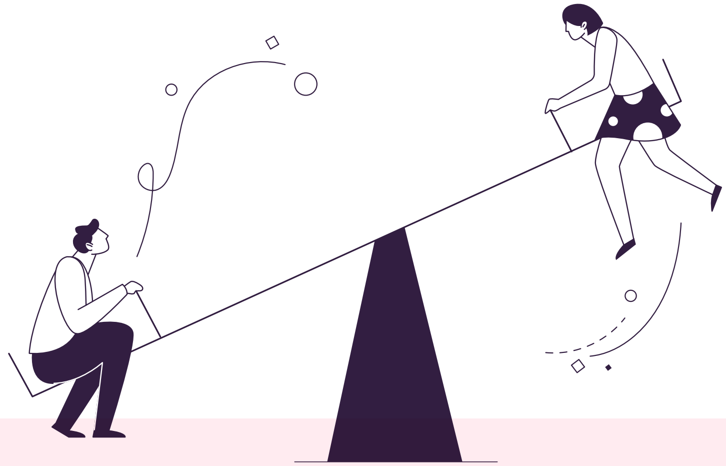
In fact, in Richardson's Understanding Selling Challenges Report, they found that the "knowledge about how to team sell effectively" was the third most-pressing concern for sales professionals at 26%, only barely behind "combating the status quo" (27%) and "competing against a low-cost provider" at 33%.

But although there is no foolproof method for 100% successful team selling just yet, it is possible to identify a few key components that teams must have, based on business trends and successes that collaborative teams have seen so far.

TOP 3 MOST PRESSING CONCERNS FOR SALES PROFESSIONALS



Key components that make a successful team



A clear plan
One of the pitfalls of any type of group work is miscommunication (or lack of communication). The more people in a group, the higher the risk. From not being aligned on goals, to not making information available, to not being clear on roles, there are many traps lying in wait for teams—no matter how much they wanted to collaborate in the first place.

That's why it's crucial to have a clear plan from the start. Lay out objectives, roles, tasks, and deadlines. Always err on the side of over-communicating.

The right players
Having A-players is good, but having team players is arguably even more important. When hiring, look for people who are selfless: people who would sacrifice individual achievement and recognition—*and* also who would willingly step up—if it helps the team win. After all, today, selling is a team sport (involving Sales, Marketing, Business Development, Operations, Customer Success, and more).

A selfless culture
Closely intertwined with having the right people on the team is having a selfless culture. But what are the signs of a selfless culture? For one, there must be an investment in collaboration: teamwork is expected—not just a nice-to-have quality.

Often, it's difficult for a culture like this to coexist with the tendency to reward selfish superstars. That's not to say you shouldn't have high-achievers; they just cannot be the type of high-achievers who put their teams at risk for their own achievement. Culture must be consistent.

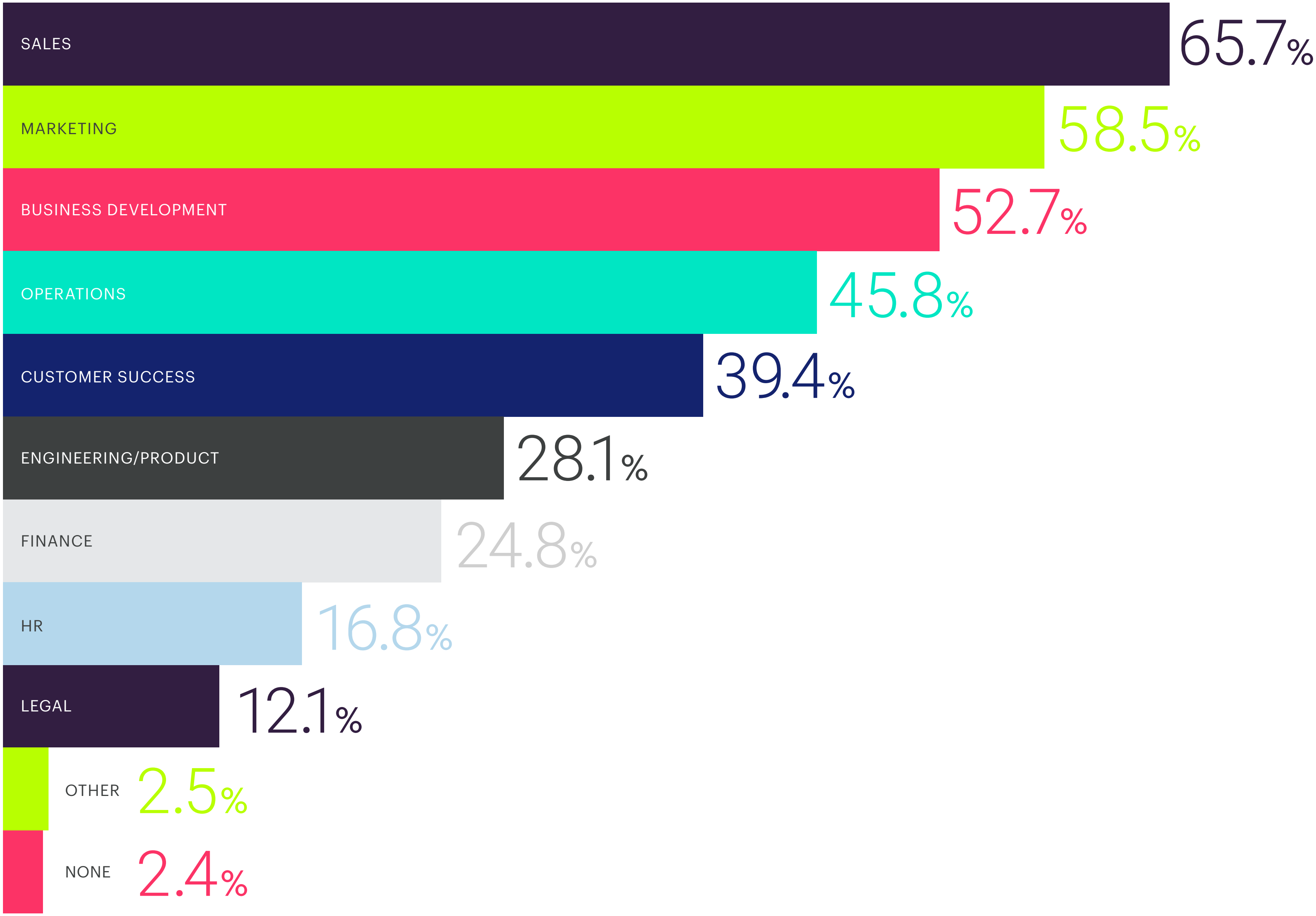
The right tools
Once you've created a collaborative culture and assembled the right team, they must have the right tools. And the right tools should offer shared metrics and a single, consistent source of truth. If everyone is logging data and content in different ways, it will be inefficient (and often impossible) to collaborate because everyone is working from different notes.

Because more teams and people are building relationships than ever before, it's even more important now that every interaction is captured in one place for maximum visibility and context.

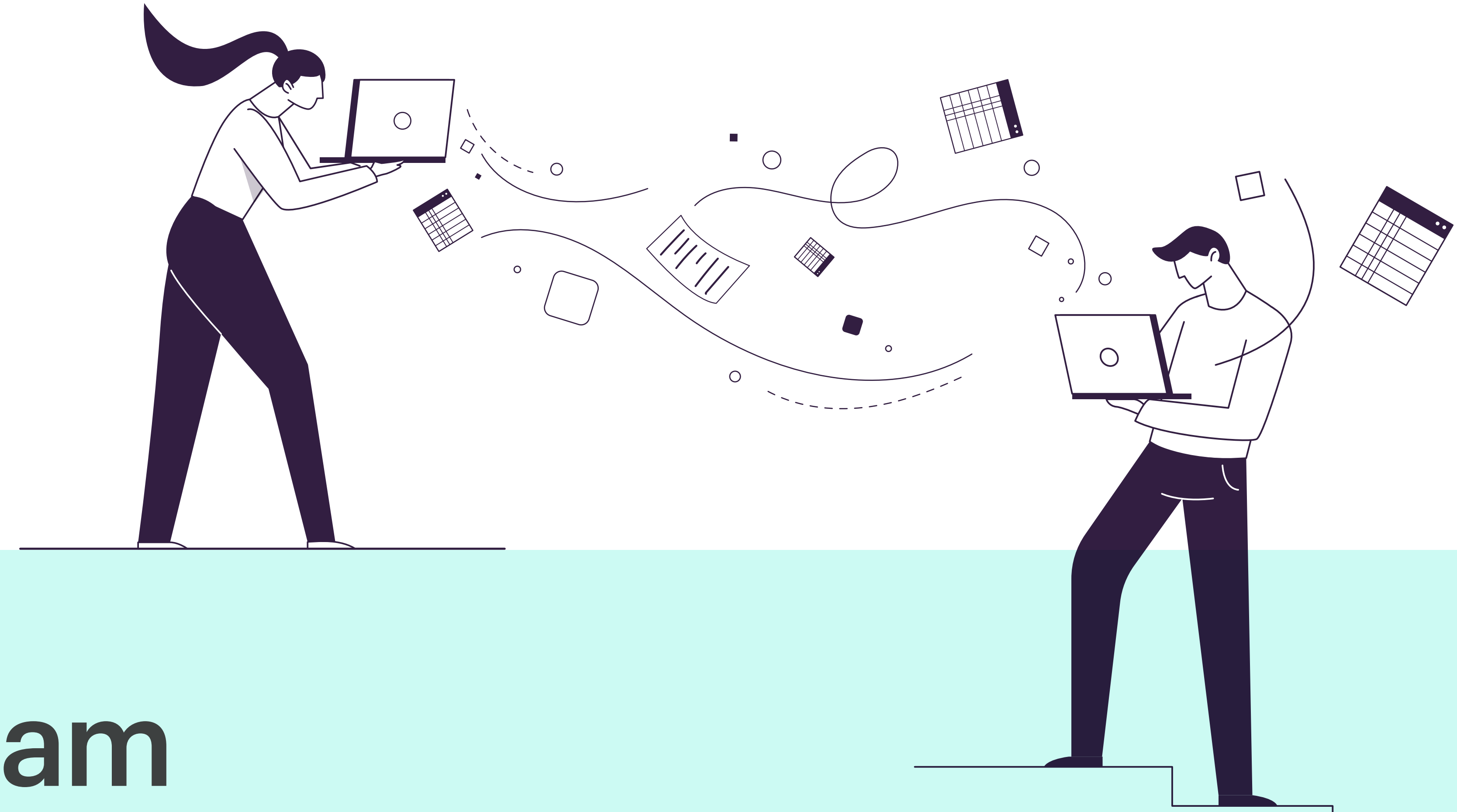
This is where it's essential to look for technology that works smoothly—and not necessarily the most popular tools or the biggest names. An intuitive and customizable CRM can help a sales team become the best version of itself, but an impractical piece of software will do more harm than good (re: wasted time).

Communication
Checking in, following up—successful team selling requires timely communication, not only with prospects and customers, but also within the team. Fortunately, with technology, this is now one of the easiest things to get right. Automated reminders can help a team be more proactive in following up, and a team that consistently communicates is less likely to let deals and opportunities fall through the cracks.

WHICH TEAMS DO YOU COLLABORATE WITH TO MOVE YOUR CUSTOMER RELATIONSHIPS FORWARD?



CHAPTER 4



Team Selling Best Practices.

Every team has specific techniques that it prefers when doing team selling, but there are general strategies that most teams can use.

Although none of the steps below require much more than a clear process and a willingness to work together, all of them can done more efficiently and effectively if using the right technology.

1

Identify the needs.

The first question: what do you need? Or more specifically, what does your client need? List the must-haves. It may be deeper product knowledge, legal and compliance guidance, a new type of product resource, or subject matter experts who can act as "bonus" resources to close your client.

This is where having technology like a CRM will make it easier to align a team (especially a large one) on project requirements. Once you've identified what you need, you can attach it to your project or client, then share it with the rest of your team so that everyone is working with the same information.

Depending on the size of your clients, the industries they're in, and their requirements, you'll likely need to tap multiple teams beyond Sales. Which brings us to team roles.

2

Define your roles.

Now that you have your needs, who can provide them? Which teams are these people on? How much of their time will you need?

When team selling, assembling the team you need is only half the battle; it's crucial that everyone has a clearly defined role. Otherwise, you may step on each other's toes, do more work than is necessary, or worse, accidentally drop important tasks.

Not everyone must be in on every meeting, but everyone must know which part they're playing. Some teams will hold meetings to catch each other up, other teams that prize efficiency will use systems that automatically log emails, meetings, and conversations.

Either way, your prospect or client should ideally have one point of contact (instead of CC-ing a dozen people on endless email threads) who can facilitate meetings and involve the right experts when they're needed. This means that the point of contact must have one key quality: sound knowledge of everyone's strengths and weaknesses.

The key in this step is to anticipate the questions that your prospect will ask and know who is responsible for answering them. *"How much will this cost? Can I get a discount? How secure is your product?"* A well-oiled team selling machine with clear roles is able to handle most questions smoothly (i.e. without overstepping on each other's areas of expertise).

3

Prepare an agenda—and follow it.

This is where your information-gathering, sharing, and collaboration skills will be tested. At a bare minimum, everyone involved in the sales call should be acquainted with the agenda and know their roles before every engagement stage.

Excellent team players will also notice gaps that aren't directly related to them, and be able to cover for their teammates (or give them a heads-up) if needed. How well does your team work together?

Following the agenda that you've established together is important, but conversations often flow in unexpected directions. The team should be flexible enough to adapt to the different types of personalities in the room, and ready at all times to pivot quickly.

To put your team in a position to succeed, always begin a call by introducing the people on the call, their roles, and expertise. This lets your prospect or customer know who they can expect to address with specific comments or questions, and aligns everyone from the start.

4

Debrief with your team.

Team learning is key to improving team selling. What went well? What didn't? This is a huge opportunity to learn and improve as a team—but should be handled carefully. When sales calls go well, team debriefs are great. When calls go poorly, debriefs can easily become a blame session with fingers being pointed around the room.

One possible format for a debrief meeting is to draw out three columns on a whiteboard: What Went Well, What Didn't Go So Well, What to Try / Improve On Next Time. Go around the room and have your teammates write down ideas on sticky notes, then attach them to the whiteboard. As a group, go through the items under each column and discuss them together. Using sticky notes is less intimidating (and perhaps less confrontational) than having each person speak to each column one at a time—which should result in more constructive comments.

Regardless of success on the sales call, it's useful to add quick bullet-point debrief notes to your CRM. If you won a new customer, you might need this information in the future to upsell them—and if you lost this potential customer, these notes could come in handy for when you get a second chance in the future, or if you ever get a shot at their competitor.

5

Celebrate team wins, not just winners.

You win as a team. Congratulate everyone involved and note how they contributed—don't just focus on "the closer." This is a chance to continue building your team culture and establish that collaboration and selflessness will be rewarded.

Though the hard work is over and you may want to just throw a "Celebratory Drinks" invite in everyone's calendar and be done with it, you should approach this step as strategically as all the other steps listed above. You could very well be changing how your team—and company—views success. Don't take it lightly.

EPILOGUE

The Evolution of Team Selling.

Even within the last 10 to 15 years, team selling has changed drastically. Sales teams are continuously learning new processes, adapting to new trends, and becoming more remote, stretching across the globe.

As our reach spans more countries and time zones, it also becomes more difficult to work together. To be aligned. To keep each other in the loop.

Selling as a team has been proven to be easier than selling on your own, especially with large deals and sophisticated customers. By establishing clear processes and intelligently using technology such as CRM and other time-saving tools, businesses can harness a newfound ability to work in larger teams without sacrificing communication and efficiency.

Today, we're selling in teams of 10. What if we could work efficiently as a team of 20?

Team selling in the Relationship Era has huge potential for skill advancement and knowledge sharing. As long as we can overcome the barriers to collaboration, we can not only avoid creating knowledge gaps inadvertently—but also set our teams up for success.

Copper is the CRM that works for you.

Copper is the leading CRM for G Suite and recommended by Google. It works instantly through a seamless integration with G Suite, has a beautiful user experience, and is designed to help teams and business build long-lasting relationships. Copper services more than 15,000 paid businesses in more than 110 countries. Headquartered in San Francisco with over 200 employees, the company has raised $87M in venture capital financing to date. For more information or to sign up for a free trial, visit copper.com

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