



HOW TO GIVE SALES REPS A DATA SCIENCE-DRIVEN PLAYBOOK

EBOOK

A case study presented by a sales
operations director at a broadline
foodservice distributor

 **zilliant** CAMPAIGN MANAGER

 **zilliant** SALES IQ



A broadline foodservice distributor in the United States prides itself on excellent customer service and being a top place to work.

The company had already been leveraging **Price IQ®** to achieve market-aligned dynamic pricing. Zilliant price optimization capabilities have been critical to its success, as Zilliant is woven into high levels of business strategy - including an acquisition and organic expansion into new geographies.

INTERNAL AND MARKET-DRIVEN HEADWINDS



INFLATIONARY PRESSURE

- Starting pre-COVID
- Only rising since the pandemic



SUPPLY CHAIN SNARLS

- Essentially a logistics company – move groceries
- Drivers are hard to find and fuel is expensive



AGING SALESFORCE

- Difficult to change habits
- Millennials entering – sharing best practices is difficult



CUSTOMER EXPECTATIONS

- Dictating the new normal
- Expect service on their terms

SALES OPERATIONS INVESTED IN SALES IQ™ AND CAMPAIGN MANAGER™ TO MEET THESE CHALLENGES

How Sales IQ™ Works

Using advanced data science to determine which customers have incremental revenue opportunities and what products and quantities customers should be buying, **Sales IQ™** typically delivers a 5 to 15 percent increase in same customer sales.

How Campaign Manager™ Works

Campaign Manager™ is an application that allows sales management and operations teams to scope, refine, prioritize, and publish campaigns based on Sales IQ™ insights. Together, Sales IQ™ and Campaign Manager™ produce and deliver targeted action types including Growth, Recovery, Product Substitution, Prospecting, Inventory, Win-Back, Contract Compliance, and more directly to sales reps.



WHY THE SALES OPS TEAM CHOSE ZILLIANT SALES IQ™ AND CAMPAIGN MANAGER™



INCREASE ORGANIC GROWTH



AVOID THE CRM TRAP



MAKE SELLING EASIER

The distributor sensed it was leaving opportunities on the table to drive more business within its customer base. A data science-driven, guided-action approach could achieve three major goals:

- Uncovering the opportunities necessary to drive organic growth
- Pushing those insights to sellers' CRM each morning
- Delivering a daily playbook for effective customer conversations

At all costs, the sales operations team wanted to avoid the CRM trap, in which CRM becomes just another administrative tool that sales reps are expected to update rather than a useful tool to help point them to the opportunities to grow revenue. It set out to unlock the true potential of CRM.

HOW DO YOU GET SELLERS TO BUY IN?

Most people would agree that hard data is better than opinion. But when it comes to sales, most likely field sales reps believe the opposite. It's not uncommon for data science or operations personnel to hear something like this from their salespeople:

"I know my route, my customers, my territory, my products, my services better than you."

"I know when my customers stop buying something."

"I've been in foodservice for twenty five years."

"I know how/where to price my products."

"I know my customers better than some computer program."

Highly tenured distribution sales reps have built customer relationships over decades and know the customers and products better than anyone at the company. As such, they were rightfully skeptical as to how a data science-driven solution could help them achieve their goals. To foster adoption of the solution, this foodservice distributor was thoughtful in how it incentivized sales teams to use the solution without being forceful.

Sales reps start their day between five and six in the morning. Once they are in their cars, they're on the move all day. So sales operations decided to use Sales IQ™ and Campaign Manager™ to give them all the information they needed to be effective before they left the house. Over their morning cup of coffee, sales reps could now get their daily playbook inside CRM.

What Reps Need To Know Every Morning

Is my truck going to be on time?

Are all of the cases going to get there?

Did my customer get everything they ordered?

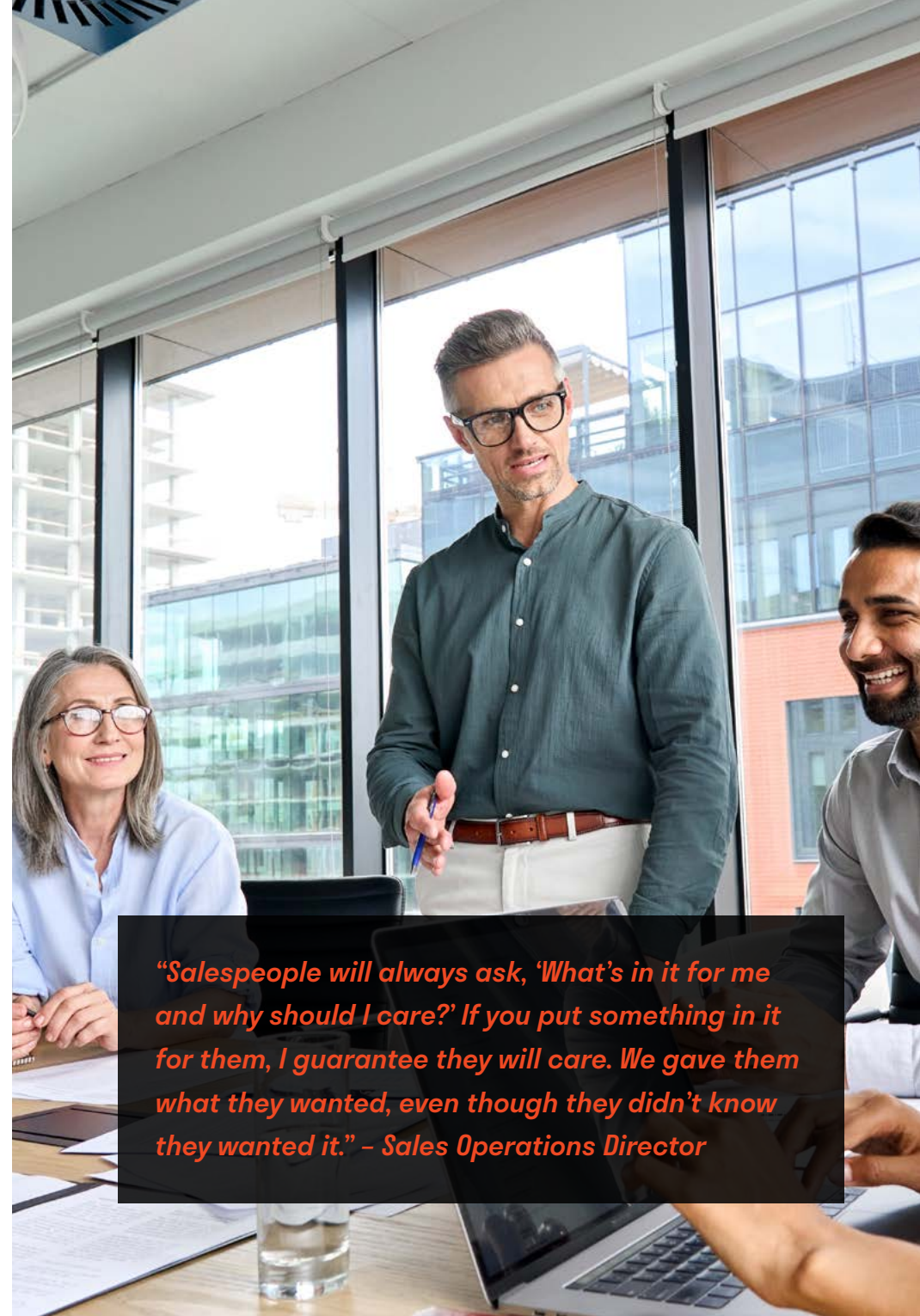
What are my upsell and cross-sell opportunities?

Is a customer starting to defect?

What are my pricing opportunities?

In the past, reps had to go to five different web sites and four emails or reports to get the data they needed. With Sales IQ™ and Campaign Manager™, their decline, penetration, and pricing opportunities are all served up in the form of action cards in one CRM dashboard. No scrolling or browsing necessary. Now each sales rep's route sheet is readily consumable and action-oriented.

The distributor never mandated that the new system be used. Instead, it trusted it would be attractive enough to draw in users. Now, 96% of salespeople are using a single CRM dashboard every morning. Unlike the painful CRM implementation, the company had forced upon sellers a decade earlier, this approach worked.



"Salespeople will always ask, 'What's in it for me and why should I care?' If you put something in it for them, I guarantee they will care. We gave them what they wanted, even though they didn't know they wanted it." – Sales Operations Director

THE POWER OF THE DOLLAR

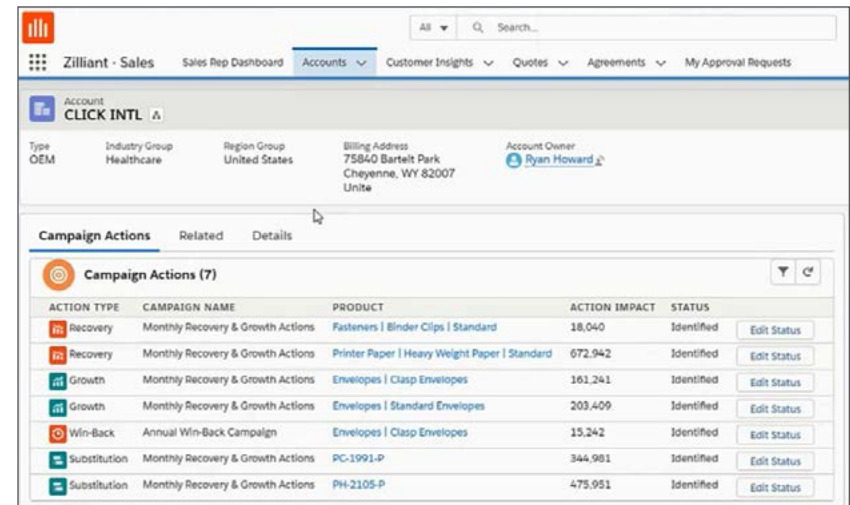
The sales operations team exposed dollar values in each action card. This showed how much revenue could be generated from the actions for each sales rep on an annual basis. Reps could see in real time just how much more gross profit they could earn just by following the guidance.

The transactional data consumed and analyzed by Sales IQ™ is fed back into the system each week. With the dollar value easily displayed next to each action in their dashboard, it is easy for sales reps to see which opportunities are the most impactful. For instance, if there has been recent lost business, sellers are instantly alerted and given a talk track for recovering it. Or if costs have gone up and price increases need to be communicated to customers, price increase actions are identified and executed in a fraction of the time.

REVENUE OPERATIONS & INTELLIGENCE DELIVERS VALUE AT EVERY LEVEL OF THE SALES ORGANIZATION

Sales Planner™ facilitates the quick, actionable insights reps can use to make decisions. Self-service list views and filters enable easier opportunity identification, and unlock the full value of CRM.

The sales operations team uses Zilliant Visual Analytics to “gamify” leaderboards and team activities for sales management. Role-based dashboards expose adoption and win rates for full transparency from the field reps all the way up to the executive team.



The screenshot shows the Zilliant Sales Rep Dashboard for account 'CLICK INTL'. The account details include: Type OEM, Industry Group Healthcare, Region Group United States, Billing Address 75840 Bartelt Park, Cheyenne, WY 82007, and Account Owner Ryan Howard. The 'Campaign Actions' section displays a table with 7 actions.

ACTION TYPE	CAMPAIGN NAME	PRODUCT	ACTION IMPACT	STATUS	
Recovery	Monthly Recovery & Growth Actions	Fasteners Binder Clips Standard	18,040	Identified	Edit Status
Recovery	Monthly Recovery & Growth Actions	Printer Paper Heavy Weight Paper Standard	672,942	Identified	Edit Status
Growth	Monthly Recovery & Growth Actions	Envelopes Clasp Envelopes	161,241	Identified	Edit Status
Growth	Monthly Recovery & Growth Actions	Envelopes Standard Envelopes	203,409	Identified	Edit Status
Win-Back	Annual Win-Back Campaign	Envelopes Clasp Envelopes	15,242	Identified	Edit Status
Substitution	Monthly Recovery & Growth Actions	PC-1991-P	344,981	Identified	Edit Status
Substitution	Monthly Recovery & Growth Actions	PH-2105-P	475,951	Identified	Edit Status



TIPS TO DRIVE ADOPTION AMONG THE SALES TEAM



ADOPT A “GIVE-TO-GET”
STRATEGY



INVEST IN TECHNOLOGY
AND PEOPLE



ESTABLISH TRUST THROUGH
AUTONOMY



DELIVER DAILY ACTION PLAN
WITH DOLLARS ATTACHED

The foodservice distributor is now seeing sky-high adoption leading to sustained increases in organic growth and gross profit. The sales operations director chalks up much of the success to an understanding and appreciation of the sales mindset. By giving the sales team valuable data-backed actions and a reason to care, the distributor showed it was investing in its people and not just new technology.

“One thing salespeople will fight to the death for is having autonomy; whether it’s pricing autonomy, whether it’s route management autonomy, whether it’s income maximization, they don’t want to be micromanaged,” said the sales operations director.

“I don’t want my salespeople running reports. I’d like them in front of customers, building relationships, building rapport, and selling groceries.” – Sales Operations Director



SUSTAINED RESULTS

Zilliant's flexible revenue operations and intelligence solution empowers field sellers to win more business and sales management to enact key strategies with less friction.



Less pricing-from-the-gut



Reduced customer churn



Created more transparency for sales



Decisions based on facts, science, and data

Watch our Revenue Operations & Intelligence video to learn more about Sales IQ™ and Campaign Manager™ [here](#).



AUSTIN | LONDON | WALLDORF | PARIS • 1.512.531.8500

EBOOK

© 2022 ZILLIANT INCORPORATED