THE ULTIMATE
B2B SALES
OPERATIONS
PLAYBOOK

Contents

Introduction

Three years ago, Forrester's VP and Principal Analyst Andy Hoar lit a fire under the B2B sales sector with the projection that [one million B2B sales positions](#) were on the block to be eliminated by 2020. More than two thirds of B2B buyers said they preferred doing business online rather than talking to a salesperson.

Fast-forward to 2018. Forrester's deadline is looming as digital adoption accelerates and it looks like Hoar's number might have been an optimistic projection.

The flipside of his analysis is that sales professionals and managers who learn how to benefit from B2B sales technology are able to operate at a significant advantage over their peers. The first step in the process of learning new strategies - and unlearning of obsolete knowledge - is a better understanding of sales operations, technology that drives business, including where it came from and where it's going.

In this ebook you'll learn the origins of the sales operations role, how it fits into the current corporate landscape as well as tips and best practices to succeed in the role.

What Is Sales Operations?

Sales Operations, sometimes referred to as Business Operations, is an essential role that covers a wide range of an organization's technologies, training, and engagement strategies that help sales teams work more efficiently and more productively with less wasted efforts.

Global B2B research and advisory firm, SiriusDecisions, describes the role of sales operations (or sales ops) as "a force multiplier" and "the critical link between the development and the execution of the sales strategy and go-to-market strategy."

To achieve the company mission, sales operations leaders must continually assess, develop and enhance the competencies of their organization in eight key areas.

The role of sales operations can handle a range of tactical and strategic responsibilities, including:

1	Sales and Revenue Strategy and Planning	5	Sales technology and methodology evaluation
2	Process design, optimization, and management	6	Compensation/incentive plans
3	Territory Structuring, and Alignment	7	Pricing and contract support
4	Deal pursuit/Lead management	8	Data modeling, analytics, and reporting

peopleai

The role of sales operations shouldn't be confused with the role of sales enablement. Sales operations leaders evaluate options and make critical business decisions, whereas sales enablement put those decisions into play. You'll typically find sales enablement within the buyer's journey, whereas the sales operations role is more of a strategic role and not interacting as much with the client or prospect.

At the end of the day, businesses run on revenue, and sales operations plays a critical role in helping sales teams achieve peak performance. With the right tools and processes in place, a sales operations professional can help the business and the sales team run like a well-oiled machine.

The Origin of Sales Operations

Before the web, sales operations originated with Xerox, according to the Harvard Business Review. They created a management group concentrated on sales planning, compensation, forecasting, and territory design. It was number heavy and analytical, but produced the kind of results that made the company a leader and many others tried to follow that path. Today, with the abundance of data analysis tools and cloud-based apps, sales ops are everywhere, helping the average salesperson do their job with less friction and better success.

Tips on Building a Sales Operations Team

While thinking about building out a sales operations team might seem overwhelming, it's a critical function to any growing organization, and needs just as much focus as any other department.

Assuring that you hire (or promote) the right people into the sales operations role at the start will ensure that you reduce the need to fix problems down the road, and change bad habits.

Below are several tips on how to build and grow a sales operations team.

Start with Your CRM

Younger companies typically take awhile to realize that not everyone should have admin access to your CRM. Giving salespeople, for example, the ability to add contact fields and account records whenever they see fit, can quickly render your CRM a flaming dumpster fire of useless, unsearchable information.

Start by hiring an experienced expert to own and manage your CRM. This person will administer the system, maintain the database, and establish rules and procedures around the CRM.

Reporting and Process

Now that you have your company CRM guru, they need to start with defining sales processes and reporting back to the team. Having a defined process and workflow will assure that you'll be able to accurately report on sales activities as you scale.

Task the Sales Operations Leader with Evaluating Emerging Sales Enablement Technology

Sales people on the front lines need instant answers, access to content, sales forecasts, and ongoing certifications. Only a sales ops leader who's aware of what's out there can make intelligent decisions about what your employees need.

Involve the Sales Operations Leader in Strategic Plans

Decisions about incentive plan design, formalizing the sales process, territory definitions and training programs should all be based on data and reports that involve the sales ops lead.

Leaving this person out of strategic planning can cause misalignment with the sales incentives, data, and workflows.

Sales Operations Team Structure

Sales Operations Representative

This is typically an entry-level sales operations role. This individual is often assigned tasks like generating reports and managing the sales tech stack.

Sales Ops Analyst

Coming into sales operations with slightly more experience, this data-driven position, is commonly charged with modeling, analyzing, and reporting on data to sales executives and cross-functional peers.

Sales Operations Manager

As the sales operations team grows, so does the need for more strategy and management. With the role of Sales Operations Manager, comes responsibility for the sales ops team. This manager needs a solid knowledge of sales methodologies, sales behavior, sales processes, and data modeling and analytics.

VP or Director of Sales Operations

This person will manage the sales ops team and work closely with the company's senior leaders to ensure strategic alignment.

Intro to the Sales Operations Process

Most of the B2B sales operations groups across sectors perform the same set of core functions.

Financial data analysis, sales metric benchmarking, and forecasting form the baseline. Coming out of those reports, sales ops teams make recommendations on sales training, changes to incentives, and sales enablement tech that individual sales professionals on the team could benefit most from.

Processes and Programs That Sales Ops Is Responsible For:

✓ Defining sales metrics, and ongoing adoption and monitoring

✓ Establishing Training and Development

✓ Optimizing and implementing the sales process (workflows, sales activities, lead generation, funnel metrics/conversion rates, etc.)

✓ Owning and optimization of sales tools (sales stack), knowledge base and other assets

Sales Ops Metrics & KPIs

Here are the top two most valuable sales metrics to keep an eye on:

Percentage To Goal (Revenue) = Divide the goal revenue by the actual (current) revenue.

Sales Velocity (Sales Pipeline) = Multiply your number of leads by your average deal size and by your conversion rate, then divide the result by your average conversion time.

Beyond that, the KPIs that matter most for your company will be determined by your sales ops experts. They are likely to start from sales essentials like:

✓ Total revenue

✓ Revenue by product or product line

✓ Market penetration

✓ Percentage of revenue from new business

✓ Percentage of revenue from existing customers (cross-selling, upselling, repeat orders, expanded contracts, etc.)

✓ Year-over-year growth

✓ Average lifetime value (LTV) of user or customer

✓ Net Promoter Score (NPS)

✓ Number of deals lost to competition

✓ Percentage of sales reps attaining 100% quota

✓ Revenue by territory

✓ Revenue by market

✓ Cost of selling as percentage of revenue generated

7 Sales Ops Best Practices

Keep in mind that what works for other companies will look very different in your execution of the concepts. A large enterprise with hundreds of salespeople is going to operate drastically different than a hundred person startup. Experimentation and iterative improvement will define your own best practices. Start from basic concepts such as:

1. Align Roles and Responsibilities With Company Sales Methodology

No person or team operates in a vacuum. Instead, complement your sales team by creating roles and handling tasks in a way that directly impacts how your sales reps sell.

2. Know Your Sales Team and Sales Process

Because sales operations directly impacts what your sales reps are doing, it's essential that they deeply understand the daily challenges and goals of the sales team. A best practice for sales operations teams is to pair-up with or shadow a salesperson so they can witness the daily life of a sales rep and get the chance to consider how sales ops can make things better.

3. Focus on Technology Evaluation

Stop buying "shelfware."

Without careful consideration of process and data integration, as well as delivering end user value, sales operations can waste resources on a tool that sales reps will reject. Increasingly, sales departments often find themselves adding up the costs of all the "productivity" tools they've purchased, and find they're spending too much on solutions that provide no real ROI.

4. Simplify and Accelerate

Shorter sales cycles bring better cash flow, even when the absolute revenue numbers don't change. Timing can make all the difference in the world between expansion and shutting the doors.

5. Pay People for What You Want Them to Do

Incentive drives behavior. Period.

This might seem like a straightforward concept, but it can actually be more complicated than you think. Pay sales reps per sale and they will tend to race to the close without adequate consideration for customer churn. Pay them per account and they may not have enough time to tend to the pipeline.

6. Automate Everything

Data entry and logging activities end up either taking away from sales time or being neglected entirely. There are plenty of tasks that software and intelligent agents can handle now and A.I. is getting smarter every day. Only a dedicated sales ops team can tell you where to invest in the most effective and practical automation as the industry develops.

peopleai

7. Manage Sales Teams Performance With Data

One of the tertiary responsibilities of sales operations is to provide sales leaders with the data they need to manage their teams more effectively.

Are your sales leaders accurately able to answer:

✓ Are sales reps taking too long to reply to customer or prospect inquiries?

✓ Are sales reps spending all of their time on low value opportunities, and letting big wins slip through the cracks?

✓ Are the deals your reps working single threaded?

✓ Are the right people engaged at each stage of the sales cycle?

Sales operations professionals are finding that A.I. powered tools such as People.ai, are allowing them to answer these critical questions. Managers are able to easily set up reporting to determine opportunity health, if reps are engaging the appropriate stakeholders during each stage of the sales cycle, and benchmark their performance against their peers.

Leveraging these insights help sales leaders mitigate the risk of a deal slipping through the cracks as well as improve a team's overall sales and close rate.

Conclusion

Sales operations is truly the unsung hero of all sales organizations. They operate as the central nervous system organizing and aligning signals between the brain, hands, and the rest of the body.

Sales teams, while they do get the glory, are only able to find success with the support and resources provided by the operations team.

By leveraging the tools, tips, and best practices in this playbook, you'll be able to not only succeed as a sales operations professional, but also drive your organization to close more deals and scale for years to come.

How Can People.ai Help Make You a Sales Ops Rockstar?

As a Sales Ops professional, your sales and marketing technology are the intelligence backbone of your organization.

Leveraging the power of People.ai increases your sales team's productivity, sales and marketing reporting accuracy, captures missed sales activities, identifies potential high value "whitespace" accounts and opportunities, as well as increases visibility into the full buying funnel to drive predictive insights for both sales and marketing.

Through CRM Syncing technology, cutting-edge A.I. driven contact and opportunity matching, sales rep benchmarking, closed-loop funnel reporting for accurate attribution packaged all in one easy roll-out, it's easy to see how People.ai will make you a Sales Ops rockstar.

Ultimately, you have an incomplete picture of your organization, and People.ai is here to help.

Ready to Become a Sales Ops Rockstar?

Find out how People.ai helps Sales Ops professionals gain visibility into their sales and marketing departments, by scheduling a demo of the People.ai solution today.

![people.ai logo]

The AI Platform for Data-Driven Sales and Marketing Teams

Automatically capture all sales activity to drive intelligent sales management and marketing insights
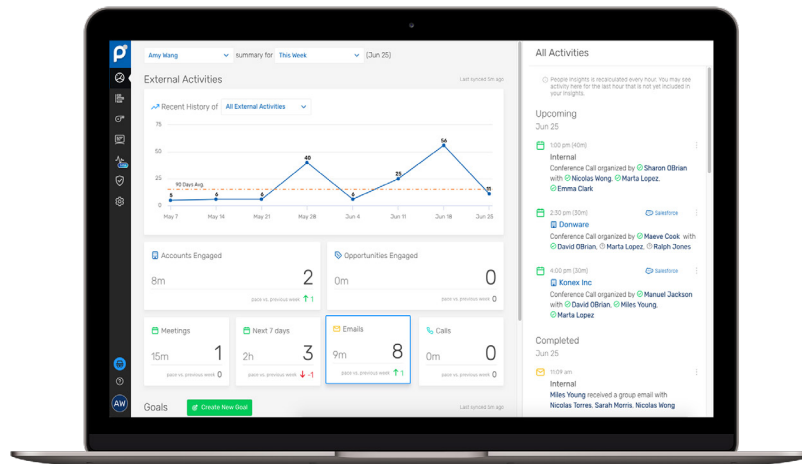
LEARN MORE

![people.ai logo]

People.ai is the only revenue intelligence platform for go to market teams. We help sales, marketing and customer success teams uncover every revenue opportunity from every customer.

Companies like Lyft, Gainsight, Tanium, Lyft, VMware, Okta, F5, Slack, and Mulesoft choose People.ai to capture contacts, activity and engagement and drive actionable insights across all their revenue generation.

Founded in 2016, People.ai is based in San Francisco and is backed by Y Combinator and Silicon Valley's top investors, including Lightspeed Venture Partners and a16z.

Learn more at People.ai and follow us on Twitter at @ppl_ai