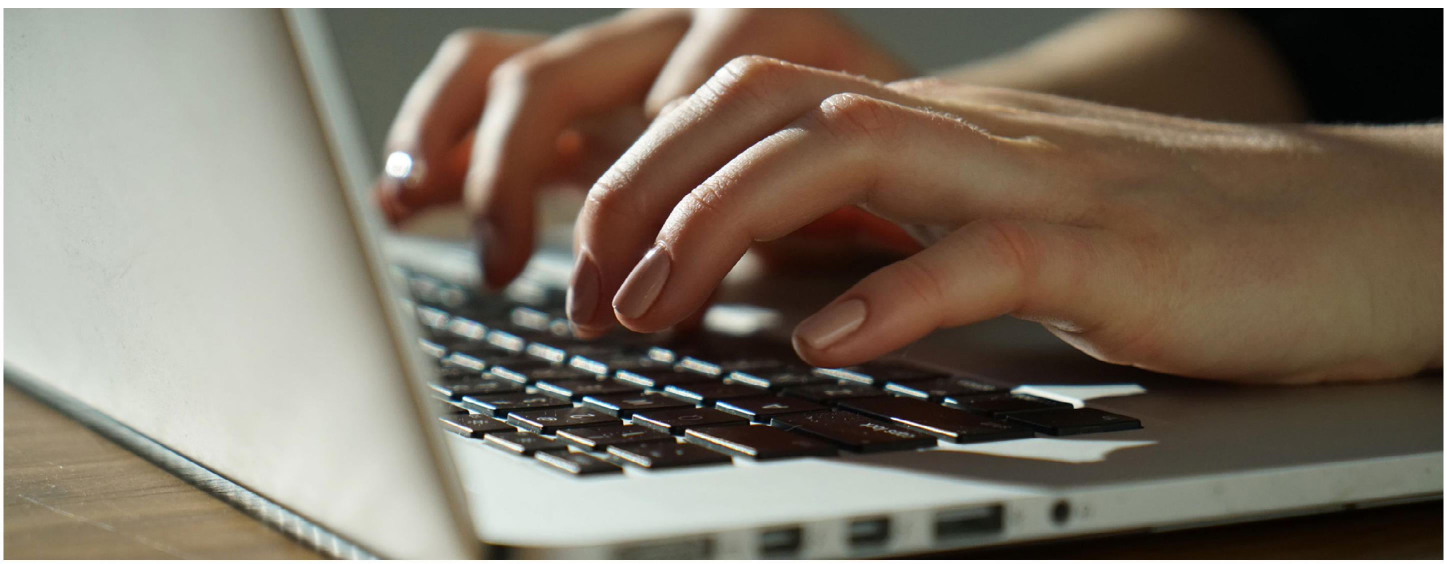
ConnectAndSell®
Conversations Matter

How ConnectAndSell Lightning Enables Work From Home for Sales Leaders

Introduction

Sales teams around the world are adjusting to the Work From Home (WFH) movement being driven by the COVID-19 pandemic. We are seeing residents of entire states in the US effectively ordered home by their governors, including California, which represents 20% of the US economy and a much bigger piece of the innovation economy. With this shift, sales leaders are finding tremendous value in technologies that are purpose-built to allow reps to have as many relevant sales conversations as possible without office supervision. In addition to providing your team with 10x the number of live conversations they are conducting today, ConnectAndSell has a suite of features that provide sales leaders with unprecedented visibility, control, and productivity in an uncertain environment.

The features below can help you lead your team through adversity no matter where they are located, whether it be down the hall, across the city, or across an ocean.



EMAIL
wfh@connectandsell.com

PHONE
(888) 240-7377

FREE TRIAL
connectandsell.com/free-trial

Leaderboard

What is it?

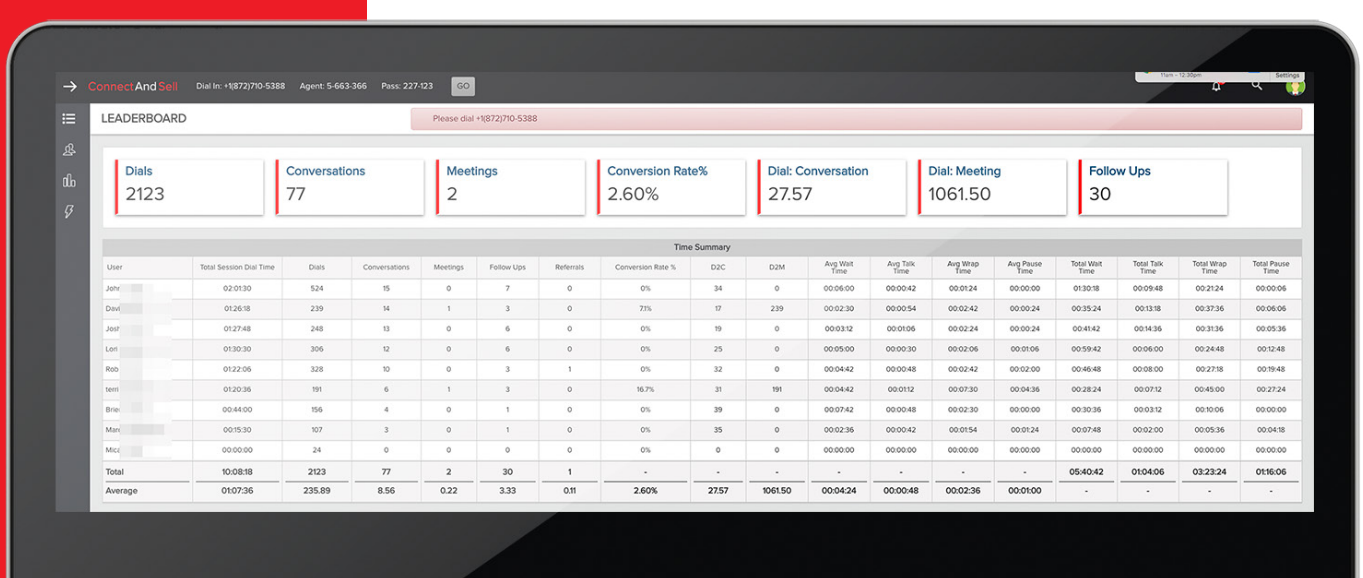
The Leaderboard is a real-time “scoreboard” that automatically refreshes and displays your whole team’s activity and KPI’s on one screen in real time.

How does it help in a WFH situation?

Sales leaders can effectively monitor their whole team’s activity as it occurs, regardless of where your reps are actually working, from home or office. This allows sales leaders to quickly provide coaching, encouragement, and recognition as appropriate to their team members, based on their performance.

Recommended usage

Throughout the calling day, sales leaders should keep the Leaderboard open in a browser tab. If you have a second display on your workstation, you can leave it open so you always know where your team stands. A tablet with a browser can also be used to log in and display the Leaderboard, giving you fingertip access to your team’s metrics wherever you are.



> "Regardless of whether your reps are down the hall or across an ocean, the coaching feature lets you monitor their conversations and provide feedback as if they were sitting next to you.

Coaching Module

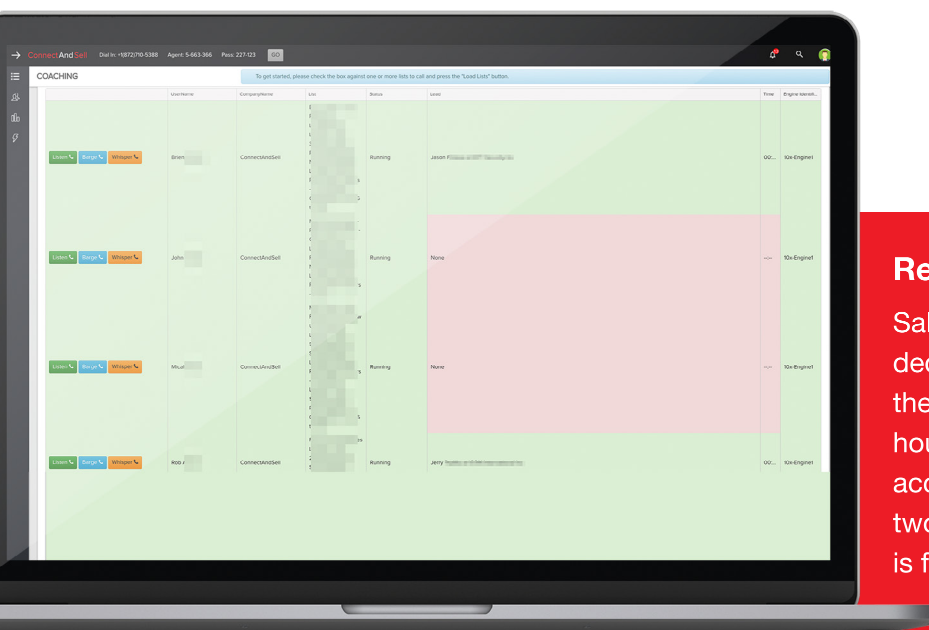
What is it?

ConnectAndSell's Coaching Module lets sales leaders listen in on their team members' live conversations as they happen. There are three interaction modes available:

- **Listen:** Listen to the rep's conversation with the prospect. Neither the rep nor the prospect will be able to hear you.
- **Whisper:** Listen to the rep's conversation with the prospect and speak to the rep. The prospect will not be able to hear you.
- **Barge:** Listen to the rep's conversation with the prospect and speak to both the rep and the prospect. Both the rep and the prospect will be able to hear you.

How does it help in a WFH situation?

Monitoring and coaching reps can be challenging in an office situation, let alone while working from home. The Coaching Module brings efficiency and ease to real-time coaching of sales reps by giving the coach fingertip-access to listen in to any rep on their team by simply clicking a button. Reps who need coaching can be spoken to during or in between their conversations. Onboarding for new reps can be accelerated by listening and debriefing with a rep after each of their calls or by using the Barge feature to enable a "team selling" approach. Regardless of whether your reps are down the hall or across an ocean, the coaching feature lets you monitor their conversations and provide feedback as if they were sitting next to you.



Recommended usage

Sales leaders should schedule regular, dedicated coaching time that coincides with their team's calling blitzes and/or regular calling hours. For new hires, onboarding can be accelerated by spending a dedicated hour or two with the new hire, where each conversation is followed by a brief feedback session.

ConnectAndSell®
Conversations Matter

Time Allocation Report

What is it?

The Time Allocation Report provides information on how your team has spent their time on ConnectAndSell. This will help you "trust, but verify" that your team is following the calling plan that you have laid out for them. The report contains the following metrics:

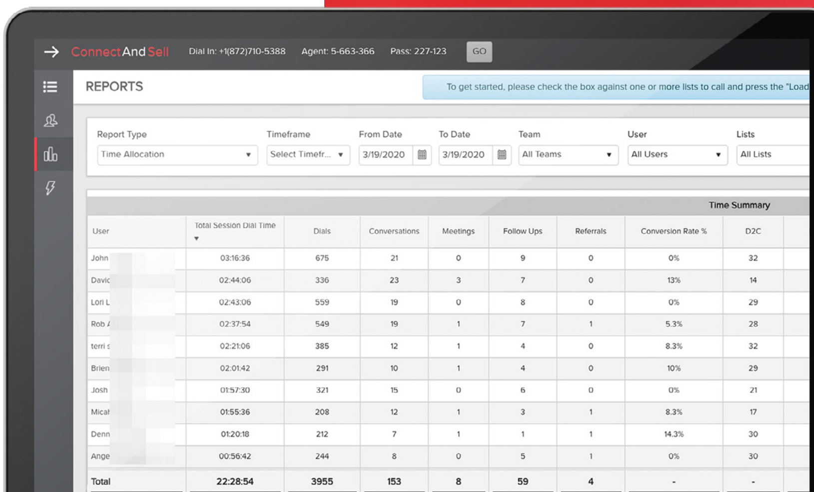
- **Total Session Dial Time:** How much "active" time your reps spent on ConnectAndSell waiting for a conversation, conducting a conversation, or documenting a conversation.
- **Wait Time** (Total and Average): How long your reps are waiting for a conversation.
- **Talk Time** (Total and Average): How long your reps are talking with prospects.
- **Pause Time** (Total and Average): How long your reps are pausing ConnectAndSell throughout the day.
- **Wrap Time** (Total and Average): How long your reps are taking to document their conversations.
- **Dials**
- **Conversations**
- **Meetings Booked**
- **Follow Ups Scheduled**
- **Conversion Rate**
- **Dial to Meeting Ratio**
- **Dial to Conversation Ratio**

How does it help in a WFH situation?

Setting a requirement for a minimum Total Session Dial Time is a good process-based goal that helps managers set an expectation for how much time their team should be spending on ConnectAndSell, actively reaching out to prospects. While a rep may not have absolute control over the number of meetings they book on a given day, they certainly have absolute control over how much time they spend using ConnectAndSell productively. This makes it fair and easy to hold them accountable for meeting the expectation you set.

Recommended usage

Set a daily or weekly expectation for Session Dial Time. Recognize those who meet and exceed the expectation, and consider enforcing consequences for those who don't. At ConnectAndSell, our BDRs have accelerators built into their compensation plan, which are tied to their total Session Dial Time.



ConnectAndSell®
Conversations Matter

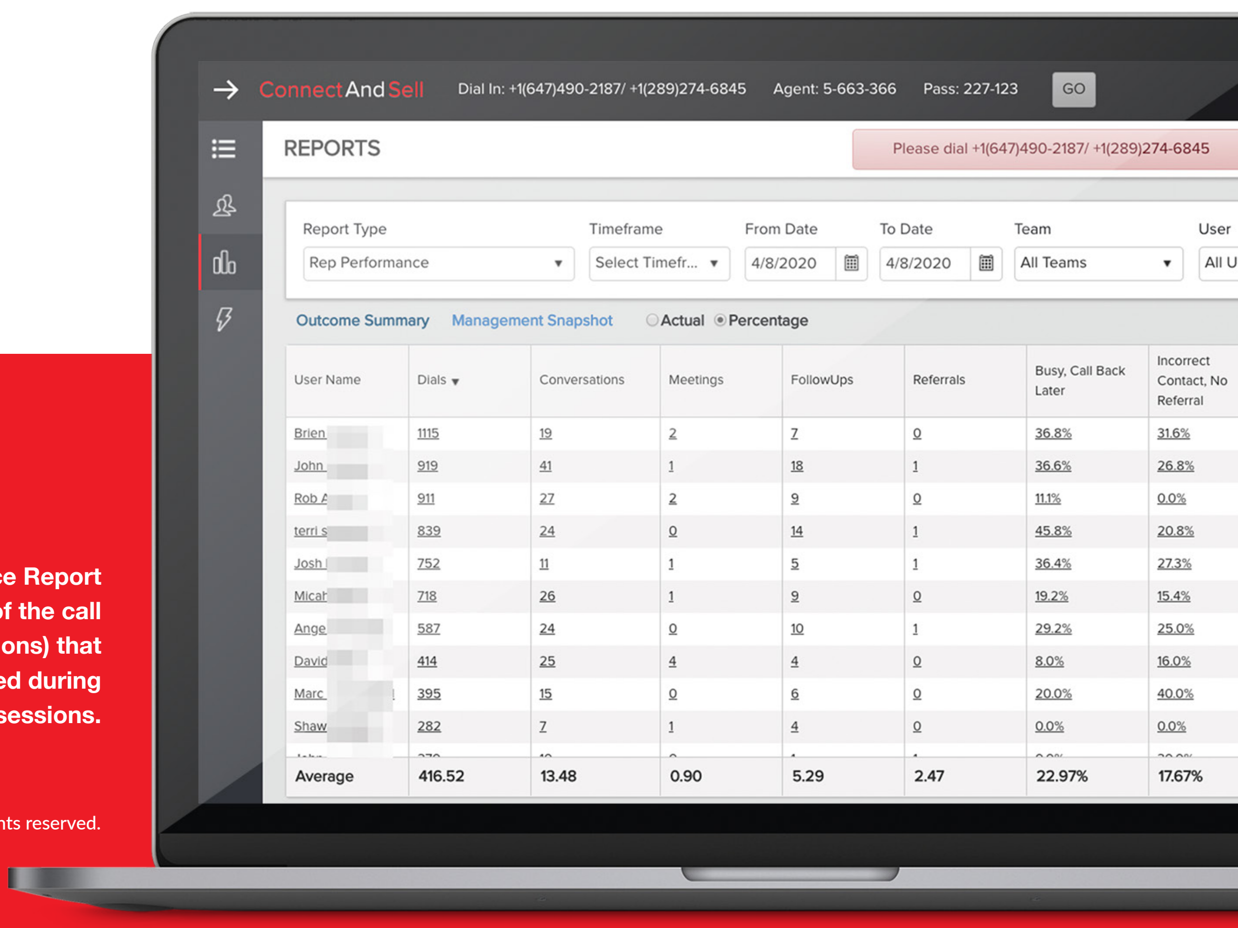
Rep Performance Report

What is it?

The Rep Performance Report provides a breakout of the call outcomes (dispositions) that your team has recorded during their calling sessions. You will be able to view each rep's detailed performance across a range of conversations, then sort on each of the following metrics to find opportunities for improvement:

- Dials
- Conversations
- Meetings
- Follow Ups
- Referrals
- Percentage breakout of each call disposition

Clicking on any of the underlined percentages in the disposition columns will automatically open up the Conversation History Report to display precisely those conversations matching that disposition for the selected rep. In this way, you can easily move with one click between finding a possible area for rep improvement and investigating the root cause of the rep's performance variation relative to other team members.



The Rep Performance Report provides a breakout of the call outcomes (dispositions) that your team has recorded during their calling sessions.

Rep Performance Report (cont.)

How does it help in a WFH situation?

When you are working remotely from your reps, it can be difficult to identify and address potential issues in a timely manner. The Rep Performance Report will allow you to quickly identify which reps need coaching, in addition to uncovering other important performance issues, such as list accuracy and messaging effectiveness. Letting these metrics guide you allows you to click through to the relevant recorded conversations and listen for opportunities for improvement.

Recommended usage

You can review this report at predetermined intervals throughout the day and identify an individual rep's issues by inspecting the following disposition trends:

Busy, Call Back Later
If this metric is high for the rep in relation to his peers', then there may be an issue with the rep's language or tone of voice.

Interest, Send Information
If this metric is high and the Meeting Scheduled outcome is low, it may indicate the rep has a tendency to settle for sending an email rather than asking for the meeting.

No Interest, No Reason Given
If this metric is high, it indicates a possible failure by the rep to engage with the prospect sufficiently.

Referral
If this metric is low, it's worth verifying that the rep is asking for a referral in each conversation that resulted in Incorrect Contact, No Referral.

Incorrect Contact, No Referral
If this metric is high, it indicates that either contacts in the list do not match the ideal customer profile or that the rep is not asking for a referral to the right person when there is an opportunity to do so.

Meetings Scheduled
By comparing those reps with a high Meetings Scheduled conversion rate to those with a low rate, you can click through to Conversation History, listen to successful conversations, extract best practices, and share them with lower-performing team members.

ConnectAndSell®
Conversations Matter

Conversation History Report

What is it?

The Conversation History Report is a ConnectAndSell report that contains all the key information about your team's conversations, including:

- Date/Time
- Rep Name, Prospect Name, Prospect Company
- Call Outcome (Disposition), Prospect Status
- Talk Time
- Call Recording Playback

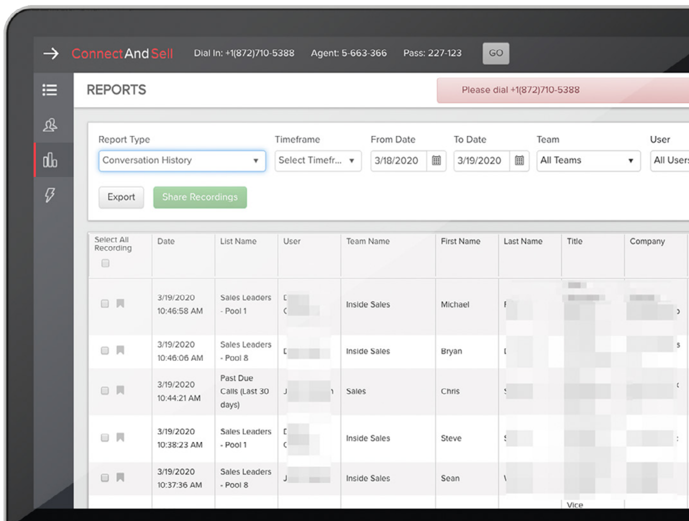
How does it help in a WFH situation?

The Conversation History Report makes it easy for sales leaders to zero in on specific reps or call outcomes using the built-in report filters. The call recordings can be listened to and shared with other team members directly from the report. This makes it an ideal tool to use to keep your finger on the pulse of your team when you aren't able to listen to their conversations live using the coaching tool. Sales leaders can use the Leaderboard to determine who is underperforming, and then use the Coaching Report to locate some conversation examples with "coachable" moments that can be shared along with feedback for the rep. They can also share call recordings of reps who are outperforming the rest of the team in order to provide recognition and also give your average and underperforming reps examples to model their own performance on.

Recommended usage

Schedule regular conversation review time, which you can use to log in to ConnectAndSell and review your team's past conversations and answer some of the following questions:

- **What behaviors do your top performers perform exceptionally well that enable them to outperform the rest of the team?** Identify a few examples of conversations that showcase these behaviors and share them with the rest of the team, asking them to emulate and incorporate those behaviors into their own calls.
- **What behaviors do your underperformers struggle with?** (e.g., failing to ask for the meeting or not projecting competence.) Identify a few examples of calls that went poorly because of the rep's behaviors. Share these with the reps individually along with feedback that pinpoints what needs to be improved. Providing your underperforming reps with sample recordings that demonstrate the ideal performance of the behavior in question provides excellent scaffolding for them to improve that aspect of their own calling.

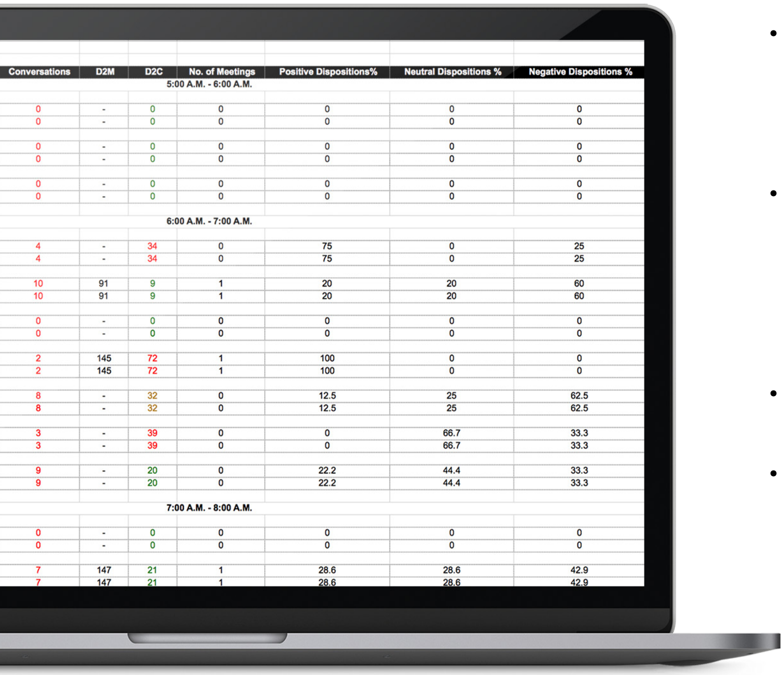


Activity Reports

What is it?

Sales leaders can configure ConnectAndSell to automatically email them a comprehensive Activity Report on a predetermined schedule: hourly, daily, or weekly. When managing a team in a Work From Home situation, we recommend setting up hourly Activity Reports. Every hour, you will receive an updated report containing the following information for each rep, broken down hour by hour:

- Dials
- Conversations
- Dial to Meeting Ratio (D2M)
- Dial to Conversation Ratio (D2C)
- Number of Meetings Booked
- Positive, Neutral, and Negative Call Dispositions (outcomes) by percentages



How does it help in a WFH situation?

When you are physically separated from your reps due to a Work From Home situation or any other situation that requires you to work from disparate locations, it can be difficult to keep track of each rep and their performance, particularly if you are away from your computer. Setting up auto delivery of ConnectAndSell Activity Reports to your inbox ensures that you will get an updated view of each of your reps' productivity and results each hour throughout the calling day, delivered straight to your inbox and accessible via your mobile phone.

Recommended usage

Set up an hourly Activity Report to be delivered to your inbox. Each hour when you receive the report, take 30 seconds to open it and review the following:

- **Dials:** Are your reps on track to hit their daily dial goal?
- **Conversations:** Are reps on track to hit their daily conversation goal?
- **Dial to Meeting Ratio:** Do any reps have a dial-to-meeting ratio that is relatively higher than the team average? If so, consider having a brief coaching conversation with the rep in question.
- **Dial to Connect Ratio:** Are any of your reps experiencing a dial-to-connect ratio that is relatively higher than the team average? Investigate the health of the lists they are calling for potential issues: high average attempts per contact or high ratio of main numbers to direct numbers.
- **Number of Meetings Booked:** Did someone have a great hour and book one or more meetings? Recognize them!
- **Positive, Neutral, and Negative Call Dispositions (outcomes) by percentage:** A high proportion of negative call dispositions can indicate an issue with a rep's pitch. Listen to their pitch using the Live Coaching tool and provide feedback as needed.

ConnectAndSell®
Conversations Matter

Distraction Management

A major challenge for those working from home is maintaining focus in the face of the many distractions we often encounter in our living spaces. Interruptions from kids, pets, and significant others, as well as the temptation to catch up on things around the house, can all make staying in “the zone” and getting real work done a significant challenge.

Here are some tips that will help you stay in flow and make working from home a positive and productive experience:

Set up a dedicated workspace

Working from the couch once in a while can feel like a treat. However, for the sake of your productivity (and your back!), we recommend setting up a dedicated workspace somewhere in your home. A desk in a room with a door that closes is ideal, but in a pinch, a table with a good quality chair in a low-traffic area of your home will also work. If your situation allows a double monitor set-up, that can increase your productivity by 20–30%.*

** Research from business.com.*

ConnectAndSell®
Conversations Matter

Distraction Management (cont.)

Stick to a morning routine

When working from home, it may be tempting to roll out of bed five minutes before your first meeting, hit the coffeemaker, and then start working right away. Resist that! Sticking to a schedule similar to what you had when you were working in the office will help your brain and body adjust to your new WFH routine as quickly as possible. That means getting up, having something to eat, bathing, getting dressed, and then making your way to your home office. These activities, which you've likely done Monday through Friday for most of your office-working life, all act as cues to tell your brain that it's time to work. Try it both ways, and you will quickly see that a solid morning routine leads to more productive and successful work-from-home days.

Leverage technology to maintain focus

Technology is a double-edged sword. It can be a focus creator or a focus stealer (Hello, Netflix!). Here are some tools that can be used to support your focus throughout the day.

- **Brain.fm:** This service provides a menu of background sounds and white noise to help you focus in noisy environments.

- **Google Tasks:** Especially when you are working from home, it is important to maintain focus on what's truly important and try to reduce the activities that do not move you closer to your biggest goals. Creating a checklist of your goals for each day is a simple but very effective time management tool. There are a multitude of task managers out there. Google Tasks is one that is simple and effective.

- **ConnectAndSell:** Prospecting manually is boring at the best of times. In a WFH situation, it can be nearly impossible, due to human nature and our tendency to be easily distracted when doing boring repetitive tasks — like dialing and navigating 20+ phone numbers and only speaking to voicemail. ConnectAndSell Lightning eliminates the frustrating process of dialing and navigating phone systems and gatekeepers. In place of that, we provide a "one click delivers one conversation" capability, sharply reducing the chance of getting interrupted or distracted by kids, pets, and other realities of life at home while having the critical conversations that drive business results.

Summary

Sales teams have a duty to their companies and their countries to keep selling through these uncertain times. Sales is the engine that drives a company's bottom line and ultimately the nation's economy.

As we collectively adjust to the new reality in which we find ourselves, a sales organization's ability to maintain control and communication will determine if it survives and thrives or falls victim to the extraordinary circumstances facing the global business community.

ConnectAndSell will allow you to control your team and communicate with them even when faced with the constraints of a long-term Work From Home order.

Sales leaders using ConnectAndSell can expect:

- A 10x increase in the number of live conversations that their team has each day.
- A reduction in the time that a rep has to wait between conversations: 3–5 minutes with ConnectAndSell Lightning's fully navigated calling, instead of 60 minutes when dialing manually and navigating through gatekeepers, interactive voice response systems, phone trees, and voicemail.
- Access to Lightning's real-time Leaderboard, which instantly quantifies how productive your reps are — whether they are working from the company office or from home.
- A live coaching tool that enables a sales manager to listen to each of their reps' pitches, one after another — all accessed from a single screen — and then provide verbal feedback.
- Reports that break out exactly how much time a rep has spent being productive while using ConnectAndSell.
- Hourly activity updates delivered directly to the sales leader's inbox throughout the day.
- Access to a recording of every conversation their reps have using ConnectAndSell, which can be utilized in the future for quality assurance, coaching, and training purposes.

In light of current events, the Work From Home movement is on track to become the new normal. Sales managers who don't figure out how to retain visibility into their team's productivity and guide their activities from afar will become ineffective and replaced quickly. Leaders who recognize the need for new tools to support their team's success in a distributed workforce situation will be able to adapt and overcome the challenges that the transition to WFH will bring with it.

ConnectAndSell has a suite of features that provide sales leaders with unprecedented visibility, control, and productivity in an uncertain environment. A remote ConnectAndSell Intensive Test Drive will provide you with the opportunity to try out a platform that has been purpose-built to give sales leaders visibility and control of their sales teams, regardless of whether their reps are in an office down the hall or working from home.

The ConnectAndSell Intensive Test Drive is:

- **Free:** There is no cost associated with a ConnectAndSell Intensive Test Drive.
- **Fully remote:** An expert ConnectAndSell customer success manager will organize and execute the Intensive Test Drive in consultation with you, using email, video conferencing, and ConnectAndSell's cloud-based Lightning. Your sales leaders and their team members can all attend the Intensive Test Drive from home.

If this is something you and your team may benefit from, you can schedule a remote ConnectAndSell Intensive Test Drive right away by emailing us at wfh@connectandsell.com.