



EPISODE 10: GROWTH AND COLLABORATION THROUGH PROCESS AND TECH

VIDEO TRANSCRIPT

- Welcome to this episode of "Going for Growth." I'm Connie Dea from the sales cloud product marketing team. And I'd like to introduce MaryAnn Patel, VP of product management for Sales Cloud, and Justin Beam North America, B2B sales lead, and Accenture Salesforce Business group. Let's talk about maintaining growth and collaboration through process of technology. Justin, what do you think successful customers doing to adjust to the new normal? What has enabled their success?

- Yeah, that's a great question. I mean, when I connect with customers, one of the top focus areas we still discuss is always around having a good sales process. Not only something that drives, good deal, hygiene, governance, and quality, but also a process that really enables sellers to do their job with speed and simplicity. And what many customers are doing today is really creating more dynamic sales processes, building in things like business rules, intelligence, and even automation to not just manage the process, but to help accelerate it. So let me give you some examples, for deals with lower risk and maybe under a certain dollar threshold, seeing customers now, allow sellers to complete their own deal reviews, using things like deal qualification checklists, or even risk assessments, and then enable them when appropriate to self approve, and then simultaneously the system now is automatically updating their forecast. But then for more complex deals, the sales process is now working for the seller kicking off activities on their behalf. So doing things like mobilizing product specialists, bringing in professional services teammates, getting the pricing team together and creating these deal collaboration spaces

virtually. And then in some cases, even organizing the right next reviews and creating some of those deal level reports in dashboards on behalf of the seller. So now the sales process powered by new tech is actually working for the seller and not against them, helping them move fast, making sure their forecast and their pipeline is always up to date. And in some cases, getting them the support that they need when they need it. And that's why I'm so excited about some of the new technologies that I've seen coming from Salesforce.

- You know what you're talking about, it sounds kind of like what we're talking about in terms of a digital HQ, it's that single engagement layer that connects your employees, your customers, your partners, and your business applications. And it really enables us to thrive from that work from any and organizations, thankfully like to build their digital HQ's on top of Salesforce and Slack so they can grow better together. And you know, when we talk to reps, they love Slack. It's more flexible, it's more inclusive, it's more engaging, frankly, it's the way they like to sell with each other. And it helps them speed up their sales cycles cause they're collaborating, pulling cross functionals into key deal rooms, bringing people along in the conversation, getting those real time notifications on activities. So they stay up to date and all of their data and all of their conversations they're really in context. And with Slack Connect, they can even bring partners and customers into that conversation. So you wanna make sure everybody is connected and you can also resolve issues or drive the account even further. And we love to think of the digital HQ as Slack, but really it extends beyond that reps need multi-channel tools to help them build relationships



like you were talking and make sure those conversations are happening. Now that they're a little bit more virtual. Salesforce also helps them prioritize where they should really be focusing. What are their top deals? What's at risk? What.. How do I keep the team on track? And like you said, creating more dynamic sales processes, it's really simple and really important to leverage automation. You can speed up those key processes like deal approvals, and you can create automated workflows. So the approvals are automatically routed to the right people and they're not stuck in someone's email again. But it's not just the simple processes that need to be automated. We know that organizations, they have super complex processes like mortgage approval flows and other things that require people and data and systems to connect. And you can use automation to increase accuracy, decrease processing times and really connect those disparate systems. And that's why we have systems like Einstein automate that use AI to really give next best actions and recommendations to build better decisions through the process.

- So much good stuff. Sales teams are clearly leaning into technologies and tools to help their reps in this new virtual selling world. We heard about how the latest Salesforce innovations like Slack, automated workflows and Einstein automate can help sales teams not only connect with their customers and sell better as a team, but also allow them to do so in a manner that is dynamic, fluid and compliant.