

PLAYBOOK

Intelligent Sales Operations

How to scale your organization with intelligence and automation to digitally transform your selling motion.

“

Sales Operations of tomorrow are the ones who will find ways to use analytics and real-time insights at the edge to quickly adjust the allocation of resources and the deployment of tactics to help GTM teams keep up with rapidly changing markets and customer behaviour.”

Forbes: How The Power of Predictive Analytics Can Transform Business



Short on time - Read This:

- Sales cycles are longer and more complex while revenue forecasting and leakage continue. Sales teams are drowning and need a simpler and more efficient seller workflow - digital first & automated.
- Growth at all costs changed to growth efficiency and agility. The future of sales lies in expanding your view of revenue generation from just the sales team to all customer-facing functions.
- Intelligent automation technology offers a comprehensive alternative to sales manual processes and disconnected insights that are cost-effective and easy to use.
- **These playbooks and blueprints** show you how to leverage Intelligent Automation for scale, revenue and efficiency.

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The Sales Landscape

It's super fractured and shifted from growth at all costs to growth efficiency and agility.



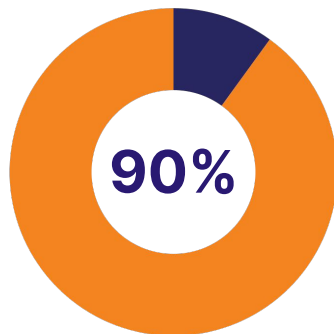
PREDICTABLE REVENUE

Digital First Insights

Buyers are more informed than before. 90% of buyers are performing research in traditional and non-traditional channels and going 65% across the buying process before contacting sales.

To achieve your company's revenue and profitable goals hinges on unlocking seller productivity across the entire sales cycle with a digital-first & automated, efficient seller workflow.

So, how can you help your sellers build a digital-first posture to create more pipeline and win more deals? Deliver predictive insights at the edge and make it easier for your salespeople to take their next best action efficiently and precisely.



OF COMPANIES REPORT THEIR CUSTOMER INSIGHTS NEED SIGNIFICANT IMPROVEMENT

While the average mid to enterprise size of organization has between 75-125 customer systems of engagement with more being added.

Source: Futurum Research and Microsoft

Sales Productivity and Efficiency Don't Add Up

McKinsey Global Institute found that 40% of tasks within the traditional sales function can now be automated. With projected advancements in technology, especially in natural language processing, this could top 50%.

Even though these investments have been made in sales productivity and efficiency tools, there is still room for improvement. Given the new digital posture sales need to employ and the rich insights customers have come to expect from sales interactions, sales leaders need tools that add up and allow their sales teams to win in the digital-first game.

**80% of B2B Sales Will Likely Occur
Digitally by 2025**

Gartner, 'Market Guide for Sales Enablement Platforms' - August 2021

Current Challenges



Challenge #1

Need a more efficient seller workflow - digital-first & automated

The pandemic—and the shift to remote, digital interactions between buyers and sellers—exposed significant challenges to the old go-to-market approach. A recent Salesforce survey made that clear: 58% of reps believe their role has been permanently altered.

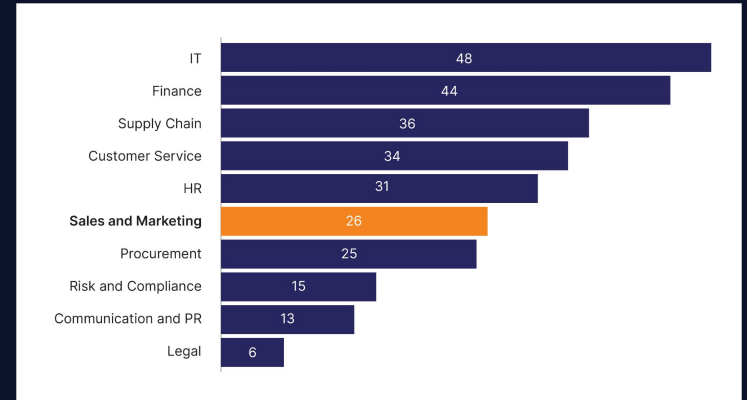
Quite simply, insights + digital-first automated motions must be at the forefront of every customer interaction. Sellers must offer engaging and intuitive solutions to buyers across the entire funnel, from initial research to the transaction to post-sales service.

Digital insights powering a more efficient workflow will lead to better overall team performance and smarter, data-driven decisions with respect to both improving execution and managing people.

Automation in sales is lagging

Which of the functions within your organization have already automated at least one business process?

% of respondents, N=764



Source: McKinsey and Company: Sales automation: The key to boosting revenue and reducing costs.

Challenge #2

Sales cycles are longer, complex while revenue forecasting challenges continues

The sales process often involves multiple decision-makers, customized offerings, larger deal sizes, higher perceived risks and competition. All creating the perfect storm. In addition, each decision-maker is in different stages of the buying cycle, requiring different digital motions from sales.

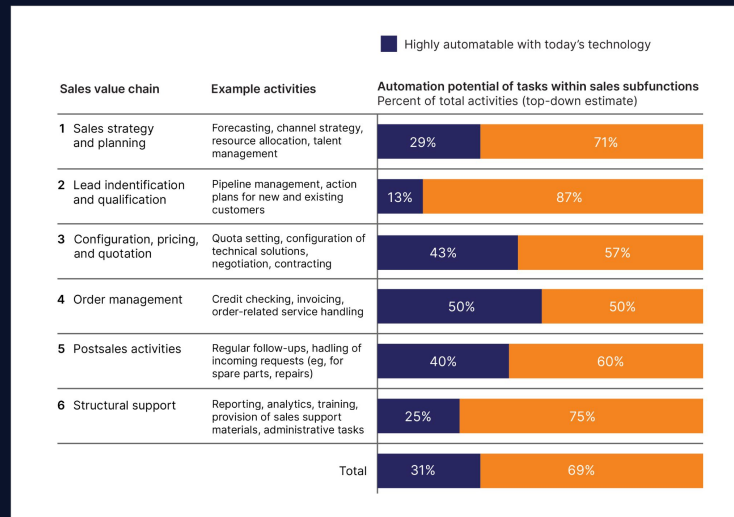
CRMs remain prevalent in sales organizations, and many sellers see entering data as an administrative task. As a result, CRM data could be of better quality. This causes long-term sales forecasting challenges because it prevents sales organizations from having historical information to feed predictive patterns.

25%+ of the sales operations leaders indicated they needed more tools to supplement CRM functionality. More tools, more to integrate, and one of the challenges in sales forecasting comes from a need for integration. In a recent study, 70% of sales leaders indicated their sales stack needed to be integrated more closely with all its applications, including CRM.

Source: DealHub: Complex Sales - Roei Ganot - 2023

Integration + Automation + Insights

More than 30% of sales-related activities can be automated.



Source: Vendor landscape review, expert interviews

Challenge #3

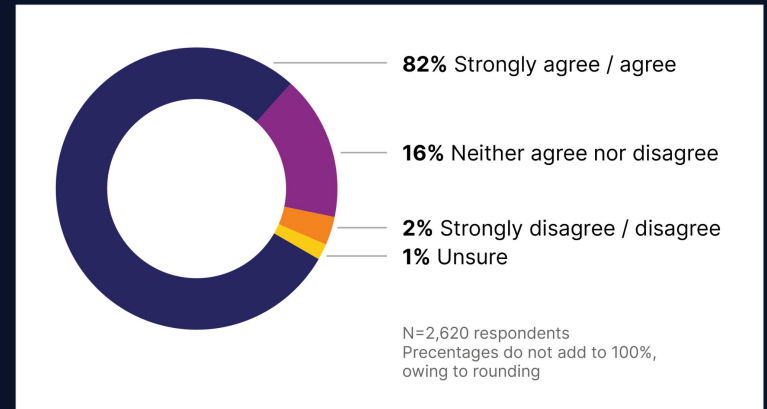
Unable to access the power of AI to improve the buyer experience and add more value in sales calls

An estimated 33% of an inside sales rep's time is spent actively selling. Administrative to-dos and meetings can pull these professionals away from prospects.

AI has traditionally been used to predict customer buying patterns. It helps figure out what people will buy next or how much they are willing to pay for a product or service. Today, that is not enough. Customer preferences constantly change, so organizations must get new information, analyze and deliver insights frequently.

But if your sales tools and data are disparate and siloed, therein lies the problem. With customer preferences changing rapidly and buying committees expanding, becoming more metric / ROI-driven, deep insights at the edge are the only way to deliver more value in sales calls to enhance customer relationships and improve your organization's chances of being selected rather than deselected.

Do respondents believe working with AI technologies will enhance their performance and job satisfaction?



Source: Deloitte - State of AI in the Enterprise, 5th edition report

Finding the Right Decision



INSIGHTS AT THE EDGE IS THE NEW OIL

You already know that
the market, customers
and competitors are
constantly changing.

Insights and scalable decisions require analytics to be part of how people work - not just in a checkpoint or a scheduled review.

A modern data infrastructure with automated data lanes typically requires many integration, modelling, orchestration, monitoring, and visualization tools. Outdated and disconnected data systems are still common in many organizations, causing trouble accessing, analyzing and delivering insights at the edge for sales.

Intelligent Automation (IA) solves this barrier to high-quality decisions. It's a modern insights technology that combines predictive analytics, process and human-in-the-loop decision support.

The best part is this technology is designed for people to be easy to use, turning your employees into insights specialists and analysts into business movers.

Challenges

Solved

#1 - Need a more efficient seller workflow digital-first & automated

Intelligent Sales Operations (ISO) helps you to integrate disparate and siloed data, automate manual, time-consuming, and repetitive tasks, and perform deep data analysis and surface insights to help sales take the next action digitally. Simplify day-to-day seller workflows by automating time-consuming tasks. This ensures sales make the best decision at every moment in the funnel. Our Intelligent Automation Platform lets you track and analyze sales rep performance and sales capacity data in real-time. Use the power of AI to gain an in-depth understanding of your target customers, optimize KPIs, increase lead generation and drive new business.

Challenges

Solved

#2 - Sales cycles are longer and more complex while revenue forecasting challenges continue

More tools in your sales and marketing stack don't automatically reduce sales cycles and improve revenue forecasting accuracy. But the right insightfully integrated tools are the game changer and do not have to consume your team. With our ISO powered by Intelligent Automation, we can surface timely insights to help sales velocity, better educate the buying committee with the right content and synchronize data from the entire sales stack to predict and deliver more accurate forecasts. With one platform, deploy AI-infused predictive forecasting to automate resource allocation and territory planning to get a competitive advantage and reach business goals.

With the help of real-time sales analytics, sales managers can anticipate market conditions, tailor their sales plan template to the customer profile, set realistic sales goals, and create a roadmap for growth.

Challenges

Solved

#3 - Unable to access the power of AI to improve buyer experience and add more value to sales calls

Intelligent Automation lowers the barrier to entry problem with no code predictive analytics, integration and human-in-the-loop decision-making tools through an easy-to-use interface so you can integrate AI and insights to improve the buying experience and add more value to your sales conversations. Improve buyer engagement. Equip sellers with data that generates situationally aware insights to influence messaging, workflows and tactics.

Two Blueprints

For Revenue Creation and Data Science



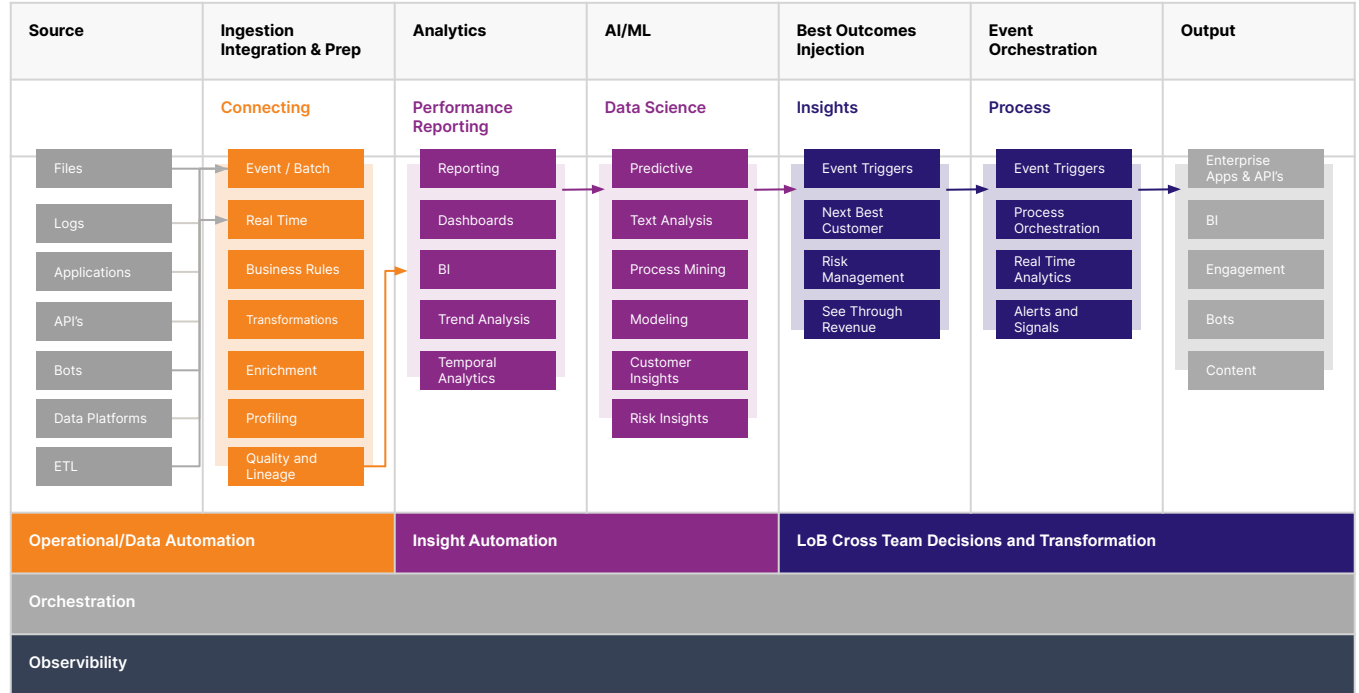
How it fits together

When things run smoothly people gain value when they can make effective decisions and operate effectively.

It starts with making the right data accessible and information available to the resources that need it most when the it's needed.

This platform view of how Put It Forward Intelligent Automation Platform fits into your data stack and how it works with solutions you have and processes that you need to improve.

In the following pages you'll see two common use cases solved by Put It Forward Intelligent Automation Platform that customer success teams are solved for.



Blueprint #1: OpenTable

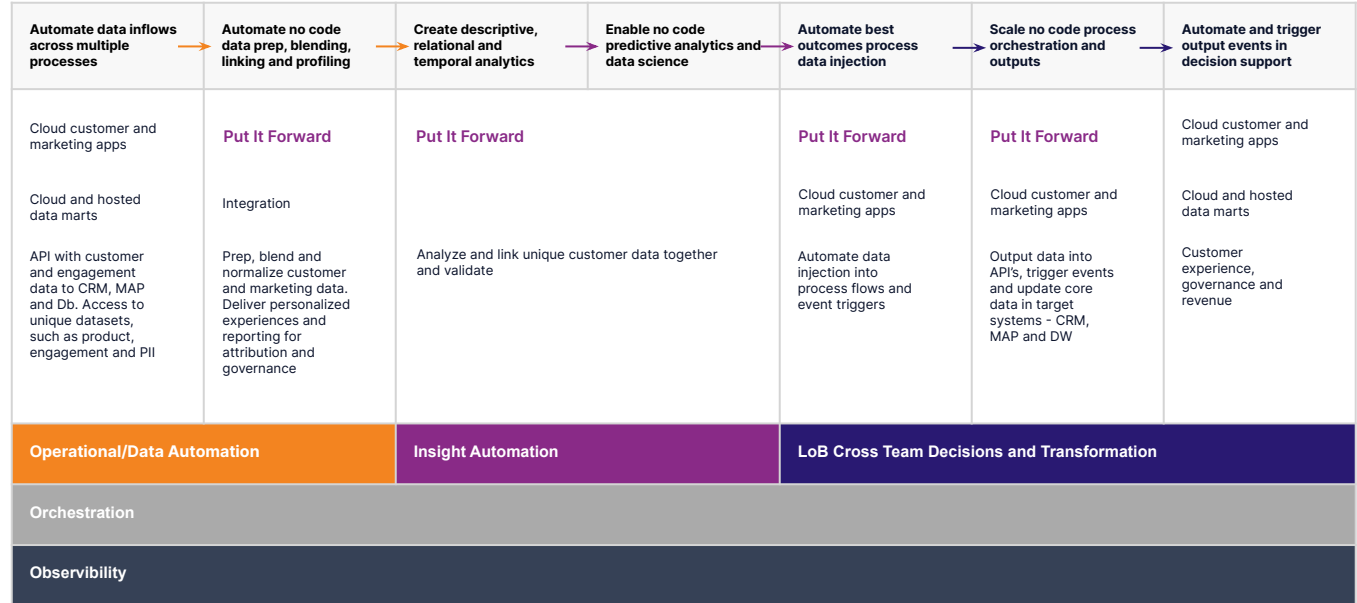
Process Automation and Data Insights for Customer Experience

Each year over a billion people choose their seat at a restaurant or bar by creating a booking through OpenTable. Owners and managers of experience destinations need to know exactly how things are performing.

Whether it's booking a table at your favorite restaurant, when you're travelling or you're an owner or manager of a restaurant it's success comes down to customer experience.

OpenTable who is a leader in the customer experience booking category needs to ensure that their customers, the owners and operators of customer experiences are themselves having the best possible experience.

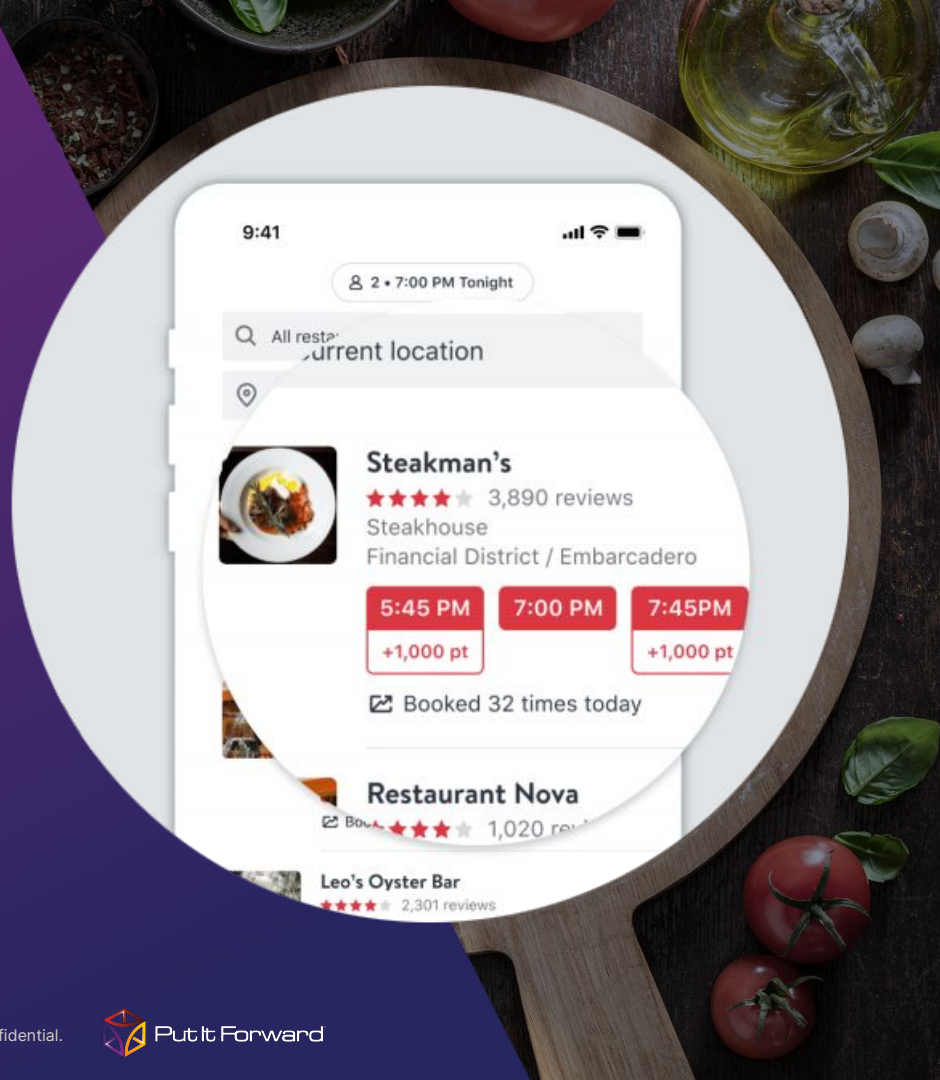
Using Put It Forward Intelligent Automation Platform they can now deliver highly personalized and targeted experiences to organizations looking to leverage the OpenTable Platform.



This blueprint represents a generic use case scenario for customer experience process automation and insights

• OpenTable®

- Deeply Personalized Experiences
- **80% Annual Cost Savings**
- Largest Global Booking Platform



Blueprint #2:

Revenue Creation Automation - Better Decisions at Scale and IoT

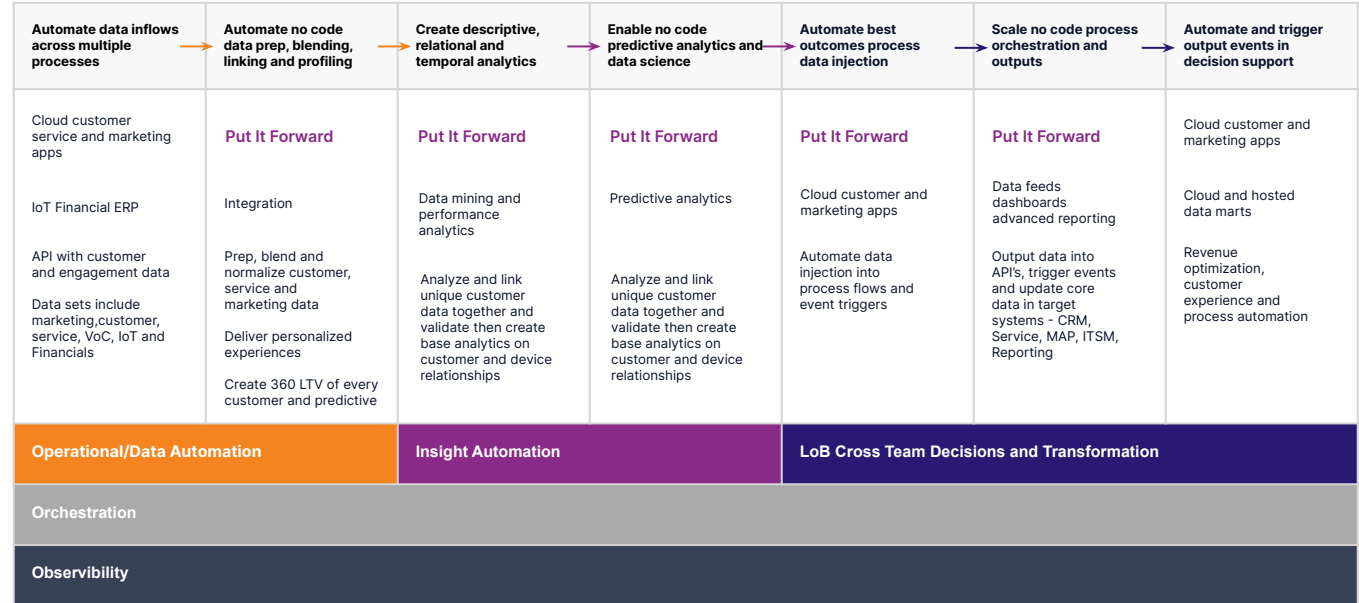
Some say that the sounds we hear and feel are the ultimate experience which connect us all together.

SoundUnited which creates some of the most iconic brands in the world of audio centered experiences has customers which engage across multiple brands and channels.

Using the Put It Forward IDA Sound United is able to unite the end to end customer experience across channels, devices and media.

They can now quickly market cross brand and channel with messages that resonate and understand at a detail level what each customer is doing along side of their lifetime value.

This let's Sound United be highly targeted with it's messaging, spend and marketing reducing cost, improving experience and leveraging the network of connected devices to a new level.



This blueprint represents a generic use case scenario for revenue automation



**SOUND
UNITED**

- Complete Customer Experience Automation
- Predictive Revenue
- **#1 Category Leader for Revenue Per Customer**

How People Use Put It Forward to

Solve Customer Success Challenges

Because your future sales operational challenges are uncertain

Revenue, operations, and IT leaders need an automation strategy to maximize their data's value. They also need to shorten the time to better quality decisions and operational excellence to handle upcoming changes in the marketplace.

The Put It Forward Intelligent Automation platform is the superior market offering to unlock your organization's true potential. Beyond creating insights at scale, creating the best possible processes and helping Sales work within a visual interface.

Put It Forward IA platform offers integrations between hundreds of your solutions, including Microsoft, Oracle, Adobe, SAP, Salesforce, etc.

Hundreds of included integrations



ORACLE®



Help your salespeople reach quotas. Improve average profit margin per target market. Shorten the sales cycle.

By getting real-time visualization of sales targets, sales quotas, capacity and incentives to optimize effective sales plans, enhance productivity and reach revenue targets.

Link your sales planning processes to business drivers in other departments—such as finance, operations or CRM—for a single, consistent view of sales metrics for all stakeholders.



But don't take our word for it alone.

Some of the best brands and organizations in the world rely on Put It Forward everyday for their mission critical decisions.

“*Put It Forward takes us where no others could - we struggled for years with an enterprise data story - this solved it across the board.*”

Udo Waibel
Sitecore

““

“For me when our internal teams tried to replicate the Put It Forward technology that was when the pin dropped ... these are really smart people.”

Sarika Saoji
Symantec

““

“Having our global teams all working from the same page is critical to our success. Put It Forward exceeded way beyond where others died.”

David Hrynk
Brookfield

““

“You guys showed us what was possible by bringing all the pieces together and making it all work seamlessly. Really truly impressed, thank you.”

Lindsay Drake
OpenTable

Want to deepen your understanding of how you can use Put It Forward IA for Intelligent Sales Operations to scale better decision making?

Here's a look at some of the top use cases across the enterprise.

Revenue and Marketing

- ✓ Customer 360
- ✓ Predictive Insights
- ✓ Order to Close
- ✓ Fraud Detection
- ✓ Customer Experience

IT

- ✓ Cross Dept Automation
- ✓ RPA
- ✓ Platform Orchestration
- ✓ Integration
- ✓ Data and Process Mining

Operations and Finance

- ✓ Process Automation
- ✓ FP&A
- ✓ Order-to-Cash
- ✓ Procure-to-Pay
- ✓ Risk Analysis

Analytics

- ✓ End User Predictive
- ✓ Data Platform
- ✓ Performance Analytics
- ✓ Customer Insight
- ✓ LTV

Getting Started With Put It Forward

Automating processes and decisions while layering in predictive analytics can be complex on their it doesn't have to be. When you use the Put It Forward IA platform you're uniting the power of your data and systems with automation directly into the hands of your analysts and directors so they can make better decisions at scale.

Ready to start?

Download the guide from IDC on Put It Forward predictive analytics solution for competitive advantage.

[Download IDC Guidebook](#)

Discover the value of intelligent automation in your organization with our interactive calculators.

[IA ROI Calculator](#)

Learn more about best practices for intelligent automation, methodologies and success patterns.

[Book a Discovery Discussion](#)

