



# A New Way of Thinking: Real-time Enablement

Discover how real-time enablement allows your sellers to have more effective conversations with buyers on Zoom.





## Table of Contents

<b>Introduction</b>	<b>3</b>
<b>The Digitization of Everything</b>	<b>4</b>
<b>Challenges to Winning New Customers Virtually</b>	<b>5</b>
<b>The Lack of Managerial Visibility Into Virtual Calls</b>	<b>6</b>
<b>Introducing Kaia: Your New Zoom Virtual Assistant</b>	<b>7</b>

## Introduction

More people are meeting virtually than ever before. In December 2019, video communications platform, Zoom, had an average of 10 million daily meeting participants. By December 2020, that number rose to 350 million. Zoom was also the most downloaded iPhone or iPad app of 2020.<sup>1</sup>

It's a new sales world and your team spent the last couple of years adapting to it.

But what if — instead of just adapting — your team could find a way to use the digital transformation to their advantage?

### **In this ebook, you will discover:**

1. New ways your reps can have more effective conversations with buyers on Zoom.
2. How once manual tasks (such as researching answers to buyer questions, and tracking action items) can be automated, saving your team time and your company money.
3. How to surface key insights from your reps' customer interactions, allowing you to provide coaching where it's needed most.

It's a new virtual sales world — and now you have the ability to rule it.

Find out how.

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Deals that were once closed with a lunch meeting and a handshake are **now happening on Zoom.**



## The Digitization of Everything

It's a new sales world. Outside reps are now inside reps. Deals that were once closed with a lunch meeting and a handshake are now happening on Zoom.

At our Unleash Summit Series, Outreach CEO Manny Medina spoke about how digital transformation impacts companies with Bill McDermott, President and CEO of ServiceNow, the former CEO of SAP and author of "Winners Dream: A Journey from Corner Store to Corner Office." Bill shared his optimistic outlook and several leadership lessons. He suggests that the determining factor of whether a company is winning or losing right now depends on their digital transformation. The companies who didn't make the digital transition before COVID-19 really suffered during it. They had to play quite a bit of catch up, while companies that already embraced digital had a leg up. "IT no longer supports the business," Bill told Manny. "IT has become the business."<sup>2</sup>

In this new environment, it's easier to sell to existing customers. The rapport is established. They have a deeper understanding of how your products or services can fulfill their specific needs. The groundwork is already laid.

However, as a company, you not only want to grow existing accounts, but bring in new ones.

# Challenges to Winning New Customers Virtually

There are inherent challenges that come with winning new business — regardless of whether it's done in person or virtually. Those challenges do seem to be a little trickier to address virtually.

**Here are some of the hurdles that require extra effort from virtual reps<sup>3</sup>:**

- **Understand the buyer's needs.** Virtual meetings make it challenging to conversationally bring up questions that surface buyers' needs. Train your virtual reps on how to approach this naturally, with example questions and scenarios.
- **Earn the buyer's trust.** Buyers are more likely to open up to reps who have proven they will keep their word over time. Virtual reps can begin to build that trust by answering questions about products and competitors accurately and following up when they say they will.
- **Effectively communicate your company's key differentiators.** Closing reps have to find a way to stand out amongst an even bigger pool of competitors virtually — and effectively position your company as the best choice. Your team needs to be well-versed on your company's value proposition, your offerings and how you stack up to competitors.

- **Gain insight into the buyer's decision-making process.** It's harder to determine who the key influencers are in a buying decision when there is less visibility into the organization and their process during a virtual meet- and-greet. Make sure your reps know the job roles that typically influence the purchasing decisions for your products or services. They can also leverage LinkedIn to get a rough gauge of the org chart.

To overcome these challenges, your reps need your help, as their manager. However, sometimes it's hard to tell where they need help most, without visibility into their calls.

There are inherent challenges that come with **winning new business** — regardless of whether it's done in person or virtually.



## The Lack of Managerial Visibility Into Virtual Calls

Time restrictions make it nearly impossible for managers to attend every call. As such, they often have to rely on the reps' notes in the system or self-reports to find out how the meeting went. Like a Monday morning quarterback, managers can then give insight on what could be done differently next time, but it doesn't change the outcome of the original game.

Reps often struggle to communicate unique, specific value to prospects. In fact, it's one of the top three reasons why they don't meet quota.<sup>3</sup> This is where coaching could really help, especially if managers could see precisely how their reps are communicating the value proposition.

Sometimes, even with the right training and resources, it's still challenging for reps to refer to the exact right message during a live call. They really need help in the moment, not after the fact.

In a virtual world, sales managers need deeper insight into their reps' video calls — and sales reps need more coaching *during* them.

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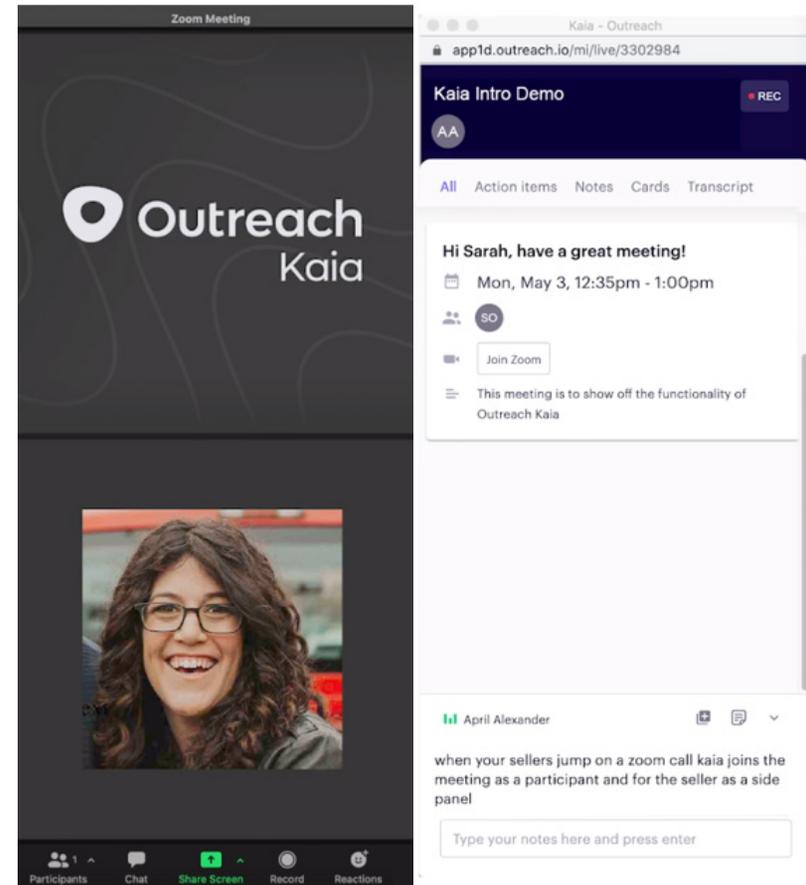
# Introducing Kaia: Your New Zoom Virtual Assistant

Outreach Kaia (**K**nowledge **AI** Assistant) is an intelligent virtual assistant that brings together real-time sales enablement and advanced automation to make every sales rep more effective during Zoom calls with buyers.

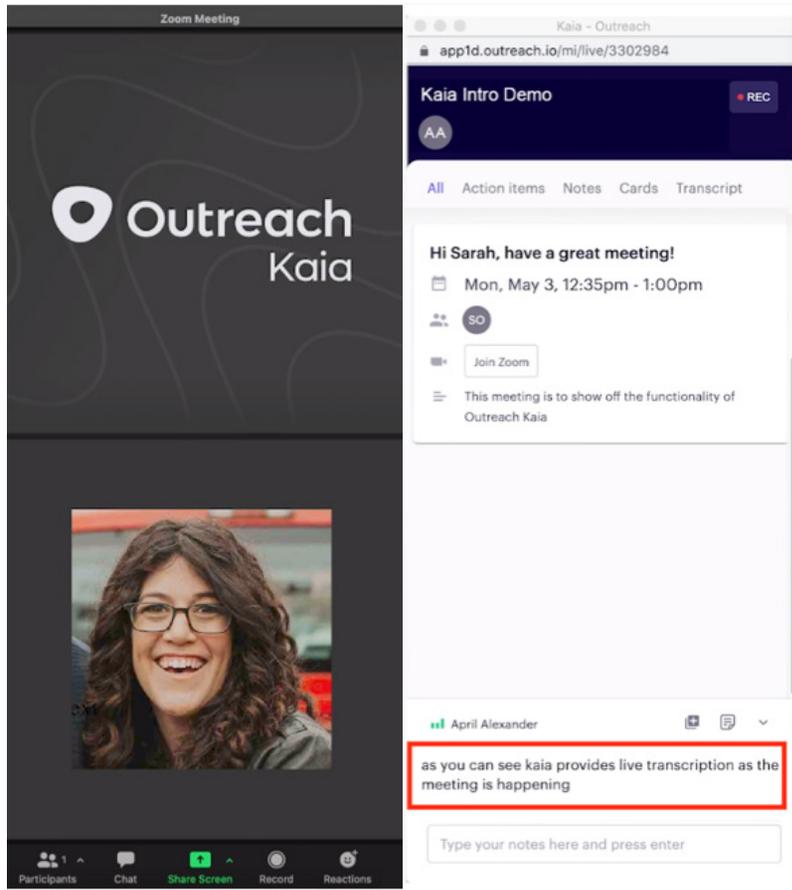
## Features that improve your reps' conversations with buyers on Zoom:

- **Real-time transcription.** Accurately capture key moments and conversations.
- **Content cards.** Get competitor, pricing, integration, and product info on cue, so reps can respond to any question with ease and confidence.
- **Notes & Bookmarks.** Stay engaged in the conversation using Kaia to help take notes.
- **Collaborative live experience.** Share notes, bookmark conversations, and coach — all live, as a team.

Let's say that your sales rep is on a Zoom call with April, vice president of marketing at a software company. As you start Zoom, Kaia launches a companion experience for the rep only. The buyer sees this as a regular Zoom meeting.



When any of the meeting participants speak, Kaia transcribes the call in real time, with 90 percent accuracy (the highest in the industry!).



Kaia arms your sales reps with ***the right information, at the right time.***



However, it doesn't just transcribe. It actually *understands* the context of the conversation. As a result, Kaia can surface information that helps reps anticipate the needs of the buyer during the Zoom call.

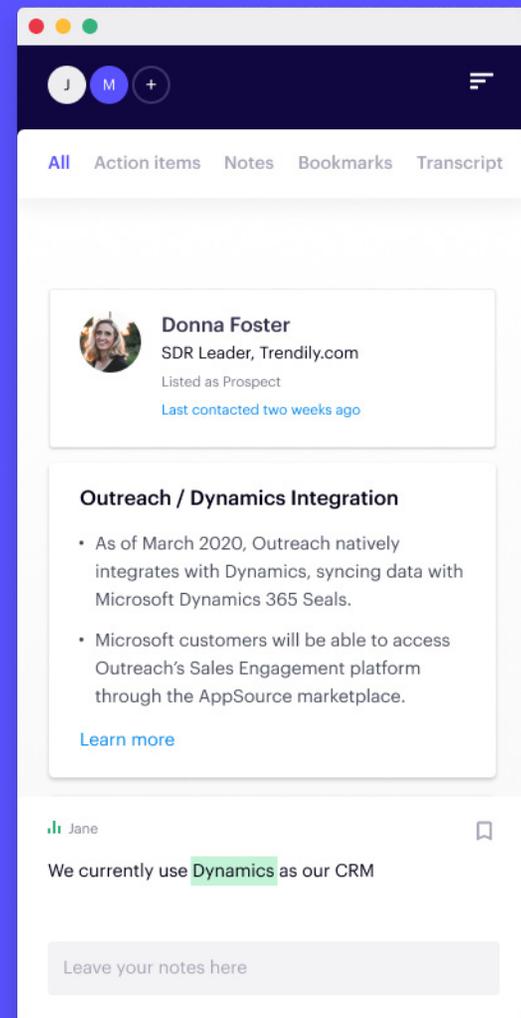
This information is surfaced through Content Cards, which are short summaries of relevant information that Kaia automatically pulls up based on keywords in the conversation. It's the right content surfaced on cue — the very moment when your reps need it.

Maybe April asks, "Does your platform integrate with Vidyard?" The rep might not readily know the answer to that. Instead of having to mark that down as a follow-up, Kaia provides the answer, right on cue.

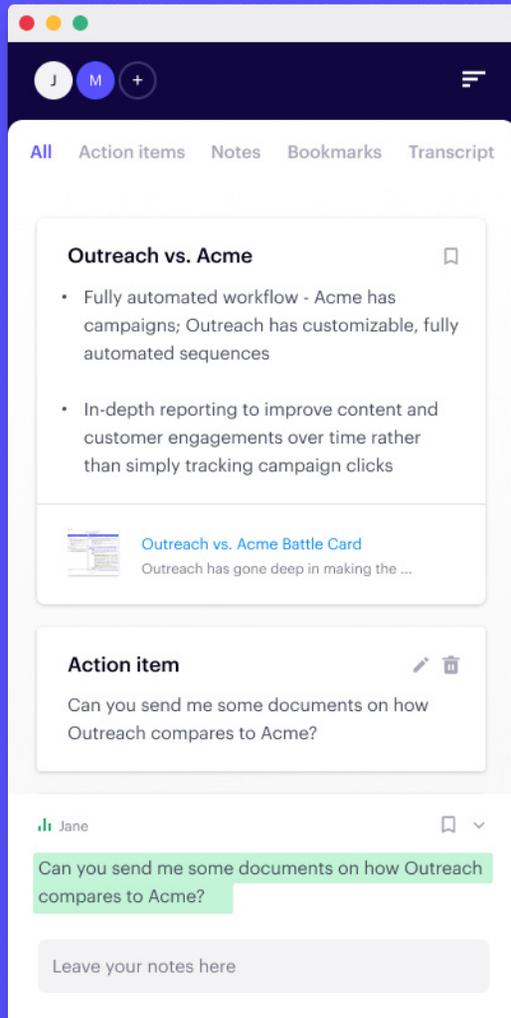
## Content Cards

Intelligently serve up relevant info based on keyword triggers

Provide real-time enablement during calls



## Detect and capture **action items**



Think about all of the topics buyers ask questions about on Zoom calls: new products, pricing, competitive comparisons. Instead of having to get back to your customers after the fact, Kaia arms your sales reps with the right information, at the right time to accurately answer the question live and move the conversation forward.

During the meeting, Kaia also detects any action items so nothing gets missed.

Reps can even bookmark key moments from the call, to easily reference and share with their manager later— AKA, all of the ‘side work’ that reps usually do while talking to buyers, is now handled by Kaia.

Our new virtual assistant also helps you identify the areas in which your reps need more coaching.

**Managers can surface that insight by leveraging features, like:**

- **Recording Summary Page.** Review meeting details and key moments to get full context of the meeting. You'll be able to see what questions your reps are asking to surface buyer needs, and how they align your unique value proposition with those needs.
- **Action Items.** At a glance, you can see your rep's action items from the call and ensure they were completed.
- **Post-Meeting Comment and Bookmarks.** Leave notes and bookmarks for your team, or use them to coach during your 1:1s.

Kaia is already helping sales leaders gain visibility into their team's Zoom meetings to strengthen their ability to sell. Rob Simmons, sales leader at LeanData, says he would love to attend every sales call, but — realistically — there just isn't time.

Kaia is already helping sales leaders gain visibility into their team's Zoom meetings to *strengthen their ability to sell.*





“Kaia gives me peace of mind knowing that **every key moment, note and next step is captured in every meeting.** Conversation Intelligence is a huge benefit to any sales leader, as it helps us listen to recordings and coach after the fact — but Kaia takes it one step further by helping in the moment — right when coaching is needed. I can confidently say that my team and I will be leveraging Kaia heavily.”

— **Rob Simmons** | Sales Leader, LeanData



# Request a Free Demo of Kaia

Enable your reps to engage in conversation with buyers that moves the sale forward. Outreach customers can [sign up to start using Kaia now](#).

Not an Outreach customer (yet)?

See what else our sales engagement platform can do by [requesting a demo](#).

## About Outreach

Outreach is the largest and fastest-growing sales engagement platform that helps companies dramatically increase productivity and drive smarter, more insightful engagement with their customers. The only sales engagement platform to make the Forbes Cloud 100, Outreach was also the fastest-growing Sales Engagement Platform on the Deloitte Technology Fast 500. More than 4,600 companies such as Adobe, Tableau, Okta, Splunk, DocuSign, and SAP depend on Outreach's enterprise-scale, unparalleled customer adoption, and robust AI-powered innovation. Outreach is a privately held company based in Seattle, Washington. To learn more, please visit [www.outreach.io](http://www.outreach.io).

## Sources

<sup>1</sup> Molla, Rani, "The pandemic was great for Zoom. What happens when there's a vaccine?" Vox, <https://www.vox.com/recode/21726260/zoom-microsoft-teams-video-conferencing-post-pandemic-coronavirus>.

<sup>2</sup> Zoltners, Andris A.; Sinha, PK; Lorimer, Sally E., "How to Reach New Customers When You Can't Meet Them in Person," Harvard Business Review, <https://hbr.org/2021/01/how-to-reach-new-customers-when-you-cant-meet-them-in-person>.

<sup>3</sup> Thomas, Julie, "Why Most Reps Won't Make Quota and How You Can be Different [New Research]," HubSpot, <https://blog.hubspot.com/sales/why-reps-wont-make-quota>.