

What is a Sales Engagement Platform?





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Executive Summary

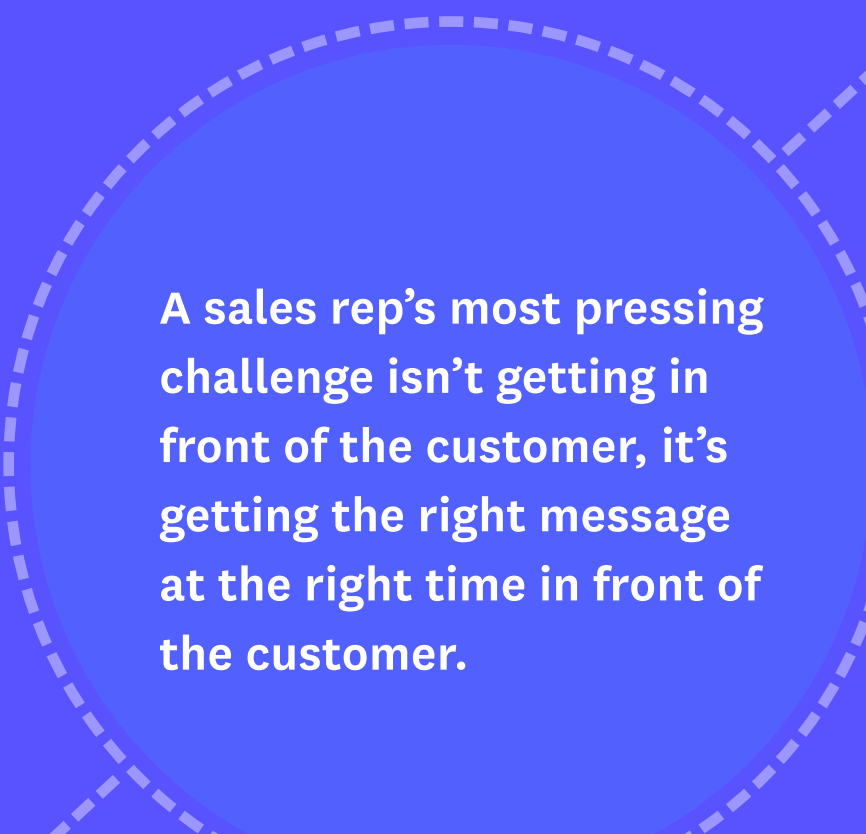
The sales industry has evolved. Personalization is no longer optional to connect to today's buyer, and B2C (business to consumer) and B2B (business to business) sales organizations need the technologies to differentiate themselves in an increasingly crowded and competitive landscape.

With sales development representatives (SDRs) sending more than **90 engagements** to prospects each day, today's buyer is often overwhelmed with messages that are irrelevant to them and are then ignored or lost altogether. In fact, **prospects delete nearly 50% of their emails** each day, making it clear that a sales rep's most pressing challenge isn't getting in front of the customer, it's getting the right message at the right time in front of the customer.

To connect with today's buyer, sales organizations need to personalize sales at scale and make each engagement relevant to each prospect's business needs. Fortunately, as the sales industry as evolved, sales technologies have also evolved to meet the needs of sales organizations and buyer expectations.

A sales engagement platform (SEP) helps sales organizations stand out and sell easier. Although a relatively new technology, it is now seen as one of the most important platforms for the modern sales tech stack, with 92% of surveyed sales organizations calling it critical to their team's success. [\[Sales Engagement Market Guide, TOPO, 2018\]](#)

This eBook is intended for readers interested in learning more about SEPs and how it enables more engagement with less effort. Readers will get an overview of a SEP and the advantages for executing key sales workflows, how it easily integrates with your existing sales stack, and core functionalities that solve historical problems for sales teams. Finally, we close by highlighting a real-life example of the great advancements one customer achieved just five months after implementing a SEP.



A sales rep's most pressing challenge isn't getting in front of the customer, it's getting the right message at the right time in front of the customer.

What is a Sales Engagement Platform?

A sales engagement platform (SEP) is a technology platform that centralizes sales engagement and activities in a single place, allowing sales representatives to be more efficient and focus on selling rather than administrative work.

Often thought of as the rep’s “system of action,” a SEP integrates with a customer relationship management (CRM) system and acts on that information--prospect info, account information, previous engagement, and more--to execute sales strategies and capture prospect engagement data that allows reps to prioritize, execute, track, measure and optimize their sales strategies, and then syncs each activity back to the CRM.

SEPs also automate administrative tasks such as follow-ups, meeting scheduling, check-ins, and other previously manual tasks, freeing reps to focus on selling and connecting with prospects. The platform facilitates greater personalization at scale and greater multichannel strategies to prospects.

With greater sales team efficiency and actionable insights, reps have more time to focus on the activities that drive revenue, and sales leaders are able to use in-platform insights to build a library of proven and repeatable best practices, or playbooks, and transform into a data-driven organization to connect and close with their target customers.

Historical Problems Meet Elegant Solutions



❗ **Problem**

Limited Visibility into Selling Process

✓ **Solution**

Visibility into Performance and Revenue-Driving Activities



❗ **Problem**

Time-Consuming Manual and Administrative Tasks

✓ **Solution**

Standardized Workflows to Drive Efficiency and Effectiveness

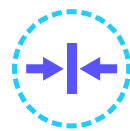


❗ **Problem**

Separate Sales Tools and Siloed Data

✓ **Solution**

One platform to complete and sync all sales activities and prospect engagements: email, text, voice, social, meetings, and more for greater efficiency



❗ **Problem**

Inconsistent Sales Processes

✓ **Solution**

Standardized Workflows to Drive Efficiency and Effectiveness



❗ **Problem**

Misalignment Across Revenue-Generating Teams

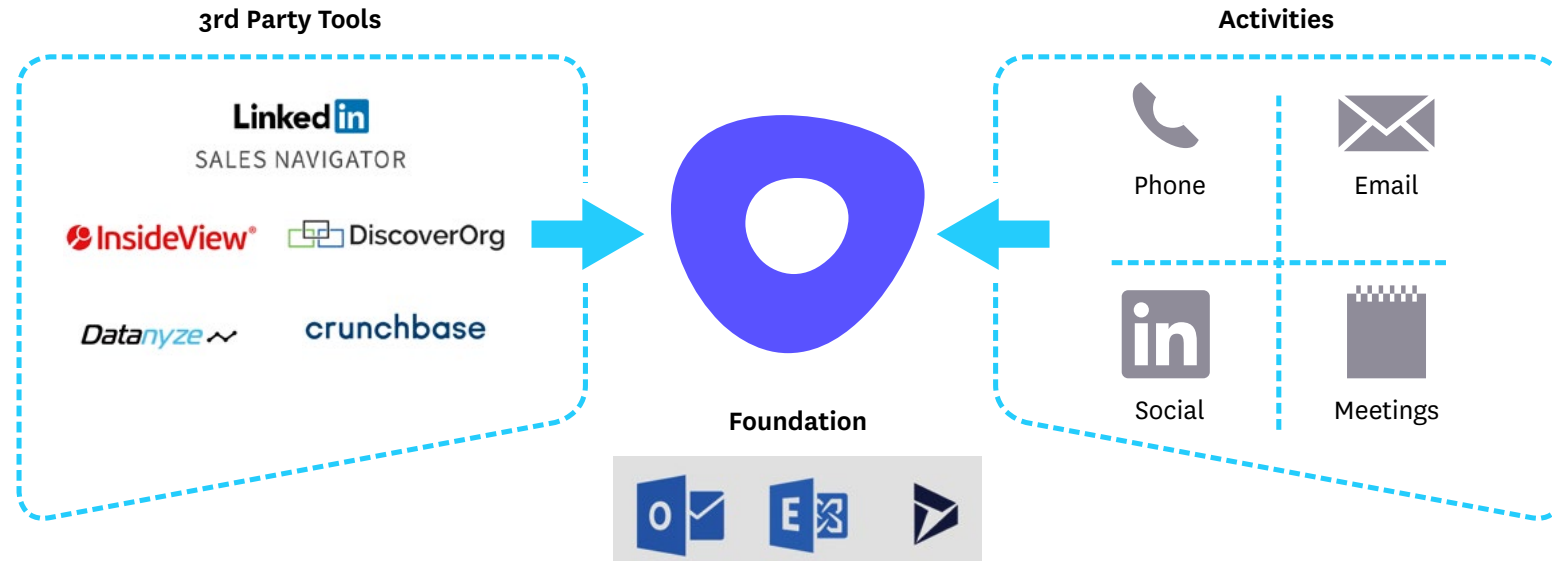
✓ **Solution**

Tracking across leads and consistent handoff and messaging across teams

Sales Engagement Platform and your Sales Tech Stack

A SEP sits at the heart of your sales tech stack and easily integrates with your sales channels (email, phone, text, social, etc.), customer

relationship management (CRM) system, and other third party solutions including marketing automation, prospect intelligence, etc., centralizing all actions and corresponding data within the SEP.



Gauging the Strength of a Sales Engagement Platform's Sync with your CRM

One of the strongest predictors of a SEP's success is how seamlessly it syncs with your CRM.

Inferior syncs can generate inconsistent data, duplicate records, spammed customers, and a business risks that cost valuable time and resources to fix.

When buying a SEP, make sure to evaluate the syncing layer along four key criteria: consistency, scalability, latency, and configurability.


With a single view across tools and platforms, sales managers and leaders have a total transparency into their sales process and can better identify what actions work at each stage of the customer journey. With these insights, sales leaders and managers can prioritize engagements that are most effective, and create playbooks for key sales roles or workflows, such as prospecting, closing, renewing, and more.

Sales Engagement Platforms are a system of action for sales reps and customer-facing teams to:

- Connect with prospects and customers at a greater scale
- Spend more time engaging with customers and less time on admin tasks
- Use the platform as an assistant to send reminders and following-up on reps' behalf
- Do everything in one place, managing all tasks and tools in a single platform

Why Now?

The sales industry has evolved. Buyers are more educated than ever before, conducting online research and talking to other customers before making purchasing decisions. In addition, they also expect personalized sales experiences and solutions that address their specific business needs and long-term growth and goals. To meet current buyer expectations, sales organizations can no longer afford to use general sales strategies and need to adopt the personalized sales--at scale--to stand out in their target market.



87% of sales development organizations have implemented a sales engagement platform.

[Sales Engagement Market Guide, TOPO (2018)]

A SEP helps sales organizations evolve their sales strategies to reflect these new buyer expectations. SEPs help catalyze a tailored buyers' experience for every prospect by helping reps deliver the right message at the right time throughout the customer journey. In fact, SEPs are consistently identified as a top-rated technology in return on investment for sales organizations, with 92% of sales development organizations highlight the SEP as critical to their success.

Not all SEPs are Created Equal

While SEPs give reps more time back in their day to sell, some SEPs have enhanced functionality to help organize and prioritize this extra time. Advanced SEPs can identify the next best action for each opportunity, honing in on the right touches, timing, and messaging to drive revenue for the organization, and can sort or filter accounts across a number of options so you can connect with the right people at the right time.

Look for a SEP that allows teams to sort by last contacted, last engaged, last created (date they were created in the SEP), last updated, title, and company.

Who Benefits from a Sales Engagement Platform?

SEPs deliver value for anyone in customer-facing revenue cycle: sales development, account executives, closers, customer success, and support, team members with specialized or general roles within the sales funnel.

Key benefits include:

- Greater Efficiency
- Visibility into Performance
- Playbooks for Success
- Organizational Alignment

Greater Efficiency

As a single platform, SEPs deliver greater rep efficiency in two key ways.

First, reps are able to do everything in a single platform, allowing them to more efficiently manage their tasks and activities across phone, email, direct mail, social media, text, and more.

Whether your business organizes sales activities by title or function, SEPs organize key sales activities and workflows including:

- Converting leads to prospects
- Generating pipeline
- Closing deals
- Renewing and expanding accounts
- Delivering customer success and support

By working within one platform, reps no longer have to toggle from one platform to another tool, and save significant time by working from a single, streamlined environment.

Second, a SEP can also act as an assistant, sending automatic follow-ups and communications on a rep's behalf. This intelligent automation helps reps achieve greater efficiency by freeing them from administrative tasks so they can spend more time engaging with buyers and spending more time selling.

Visibility into Performance

Additionally, SEPs provide in-platform analytics that gives sales leadership and managers real-time data on their team's day-to-day performance and see which activities lead to the most opportunities, measure what's working, and continue sharpening their strategies.

- **Sales Reps** can view the most successful engagements and scale best practices
- **Front Line Managers** can pull actionable data from the platform to provide individual and team coaching
- **Sales and Marketing Leaders** have greater visibility into the total sales process, from passing leads to sales, creating consistent messaging throughout the customer journey, and view which activities drive the most revenue

Playbooks for Success

With greater insights, sales organizations can further apply those insights to focus strategies by market, vertical, or buying persona: sales manager, sales operations, Vice President of Sales, and more. With the data, sales organizations can master playbooks across business needs or priorities, and identify which strategies have been shown to generate revenue across areas or accounts.

Organizational Alignment

Integrating with third party tools, a SEP helps drive organizational alignment across sales, marketing, and other revenue-generating teams by providing a clear line of sight from the creation of the inbound lead to deal close. Marketing can see when the lead is first contacted and each engagement afterward, and teams can share messaging to stay on-brand and scale success.

Core Functionalities

Systematic Engagement: SEPs facilitate systematic and strategic outreach to prospects at each stage of the customer journey, allowing teams to identify and track successful sequences to build a library of best practices to tighten messaging to your ideal customer profile, yet flexible enough for every scenario.

Outreach Delivers

Sequences, designated workflows comprised of a series of touchpoints (call, email, text, LinkedIn, social) built to drive deeper engagement with your prospect while automatically updating your CRM on all actions performed in Outreach.

Actionable Analytics: SEPs can track data not only on sales results but on sales activities and the value of each within the overall pipeline. With activity-based analytics, teams are able to concurrently identify if they are executing enough sales activity and enough activity of the right kind, enabling allowing modification of parts rather than dismantling the workflow.

Outreach Delivers

Activity-Based Analytics that tracks data on individual performance to provide real-time coaching opportunities to course-correct performance, as well as data on the value of each sales activity, enabling a new level of organizational agility to modify parts of the sales motion rather than discarding entire workflows.

CRM Integration: The SEP is often called the System of Action, which integrates with the CRM that houses prospect and customer information. Your SEP should have a reliable sync with your CRM to ensure that data passed back and forth is clean and accurate, and ensuring that the SEPs job of automating administrative tasks adds true value for sales teams.

Outreach Delivers

A single platform for reps to organize and execute their daily sales activities and integrate third-party applications via Outreach Galaxy for a single pane of glass to view all activities.



Task Workflow and Prioritization: A SEP should allow representatives and managers to sort and customize tasks by date, priority, account, or engagement, providing a truly global view of workflows based on the type of prospect (inbound or outbound) within the platform.

Outreach Delivers

Best-in-class workflows are customizable by prospect/account, priority, task, and offer drill-down views to give reps and sales managers a clear line of vision into the status and health of each opportunity.

Prospect Intelligence: In addition to centralizing sales motions and streamlining sales activities, a SEP should offer prospect intelligence-actionable insights about the prospect and their business needs from within the platform.

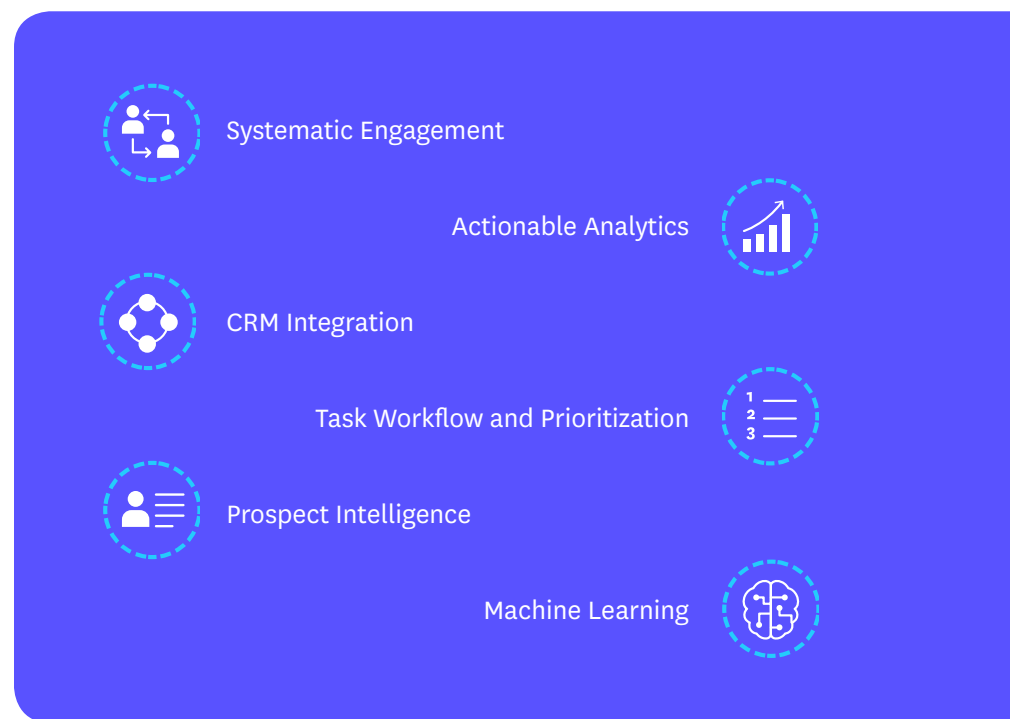
Outreach Delivers

Sales Intelligence Tiles that streams and consolidates prospect and account intelligence from a variety of sources and displays it within the platform for immediate use to tailor communications from a single screen.

Machine Learning: A technology that analyzes vast amount of data, machine learning identifies key trends and patterns and then recommends the next best action to allow teams to get better over time.

Outreach Delivers

Amplify, a suite of machine learning technologies that allow teams to A/B test messaging, act on automatically extracted information, and automate administrative tasks so sales reps can get back to engaging with prospects.



CLOUDERA

Case Study: Cloudera

From Inconsistent Processes to Proven Playbooks

As a global data management provider, Cloudera has helped companies including Mastercard, Bank of America, Allstate, and Qualcomm securely store, process, and analyze large volumes of data. With these high-profile clients and growing partnerships with IBM, Intel, and Amazon Web Services, Cloudera's Sales Development Representative (SDR) team needed a platform that could help develop new business and more efficiently communicate with their clients across the globe.

The Problem

As a profession, sales is about developing meaningful and personal connections by understanding your buyer's needs and offering relevant solutions. But without a consistent set of processes or best practices, each sales rep may communicate the value of your product or business differently. Inconsistent messaging and selling differences can limit sales teams from identifying what engagements are most effective at key points in the buyer's journey, and prevent the development of a library of best practices, or "playbooks," that have proven success in converting leads to customers.

As Cloudera's SDR Manager, John Carr discovered, "Each rep was doing things slightly different, and while we spent a lot of time training on best practices, it can be hard to enforce, track, and measure that the process was being consistently followed."

The Results

To advance their sales processes, Cloudera implemented a sales engagement platform, Outreach, to centralize and organize their sales' teams daily tasks and create winning and repeatable playbooks at scale.

By utilizing a SEP, Cloudera's sales development representative team was able to optimize their prospecting by using data to see which activities--phone calls, sending emails, social messaging, etc.--were most effective and catalyzed a new level of personalized sales at scale.

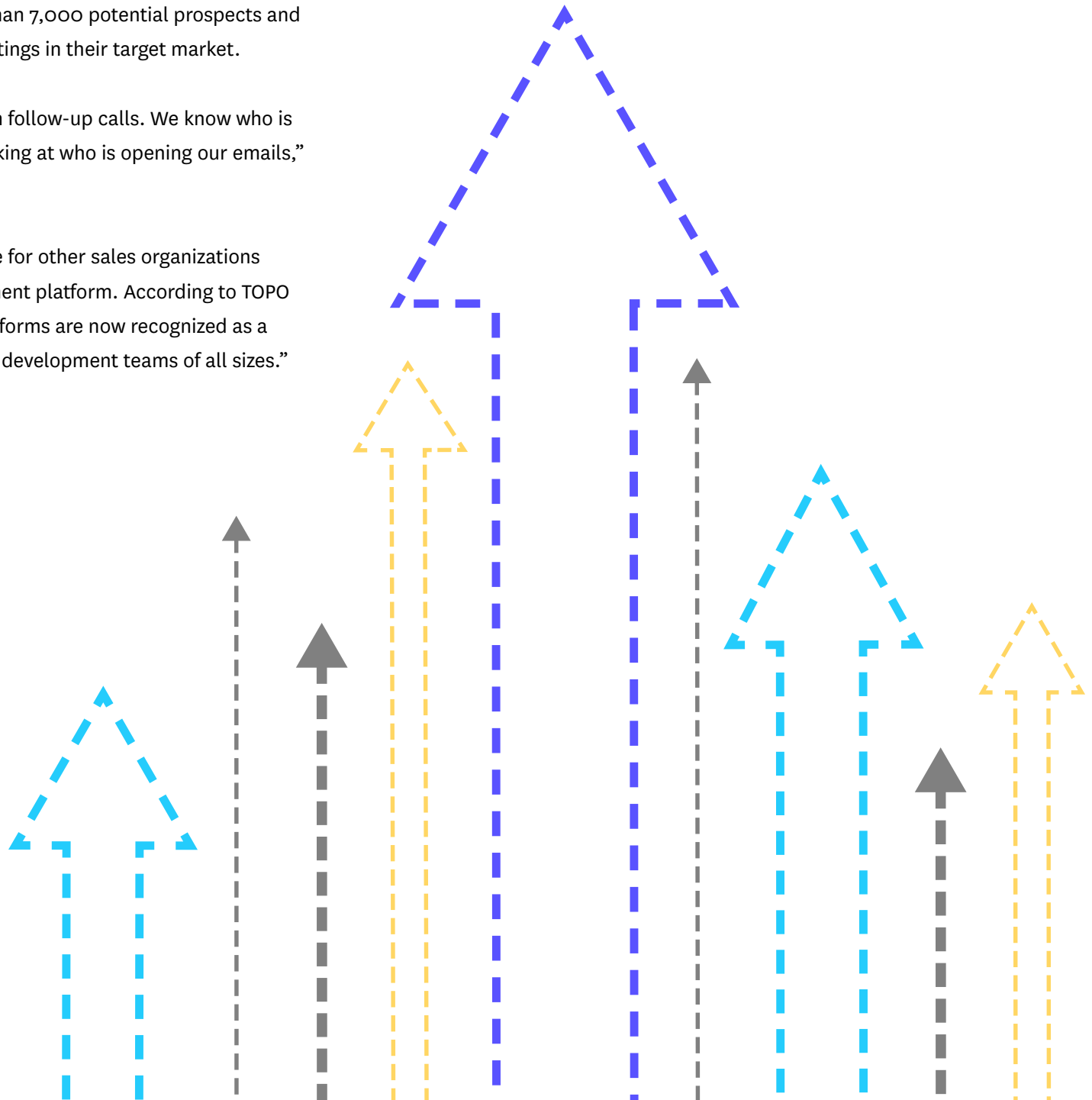
Five months after implementing the SEP, Cloudera achieved:

- 6x increase in email open rates, with as many as 60% of emails opened
- 30% increase in reply rates
- 2x increase in booked meetings

The team also identified more than 7,000 potential prospects and has set a record number of meetings in their target market.

“We are now more targeted with follow-up calls. We know who is interested in our content by looking at who is opening our emails,” said Carr.

Cloudera’s success is repeatable for other sales organizations that also adapt a sales engagement platform. According to TOPO analysts, sales engagement platforms are now recognized as a “mandatory purchases for sales development teams of all sizes.”



About Outreach

Outreach frees sales teams to focus on what matters: engaging customers. Our sales engagement platform enables reps to stand out and connect with prospects and customers in meaningful ways. Outreach brings to light what resonates best, so you can create a playbook for your entire team's success. From **startups to enterprises**, companies rely on Outreach to simplify the path to predictable revenue.

“Outreach is consistently recognized as a market leader in Sales Engagement Platforms.”

– **TOPO**, *Sales Engagement Market Guide*

Ready to learn more?

REQUEST A DEMO

