



Sales Hub Product Feature:

# 3 Steps to Frictionless Selling





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Kelley Blue Book  
**KBB.COM**  
The Trusted Resource



edmunds

**CR** Consumer  
Reports™





Lucca  
Automall



Shari Lucca

555-555-5555

John



WTF.

The best experiences come when you  
**precisely match** the way you sell to your  
buyer's expectations





At first, we  
bartered.

(A bunch of stuff happened)



Now, we buy  
from the couch.

# We demand more convenience

Sam Goody

iTunes

Spotify

Blockbuster

Netflix DVDs

Netflix Streaming

Cash

Checks / Transfers

Venmo

Rolodex

Online Database

CRM

Manila envelope

Email

Slack



High Change to Buyer



Low Price


High Price



Low Change to Buyer



# Experience Disruptors



	Cash	Lease
	<b>\$61,000</b> After Incentives & Gas Savings	
	- \$7,500 Federal Tax Credit	
	- \$2,500 California Incentive (change state)	
	- \$9,000 Estimated gas savings over 5 years <a href="#">Customize</a>	
	<b>\$80,000</b> Cash Price	
	+ \$1,200 Destination & Doc Fee	
	<b>ORDER</b>	
	<a href="#">Show selected options</a>	
	<a href="#">Print spec sheet</a>	

70D	90D	P90D
70 kWh Battery All-Wheel Drive	90 kWh Battery All-Wheel Drive	90 kWh Performance All-Wheel Drive
220 miles range (EPA est.) 6.0 seconds 0-60 mph 140 mph top speed	257 miles range (EPA) 4.8 seconds 0-60 mph 155 mph top speed Smart Air Suspension included	250 miles range (EPA est.) 3.8 seconds 0-60 mph 3.2 seconds with Ludicrous 155 mph top speed Smart Air Suspension and Active Spoiler included
Deliveries begin mid to late 2016	Deliveries begin mid 2016	Deliveries begin early 2016

# Experience Disruptors




CARVANA


**Browse. Buy. Breathe.**

Sit back, relax and experience a whole new way to buy a car.

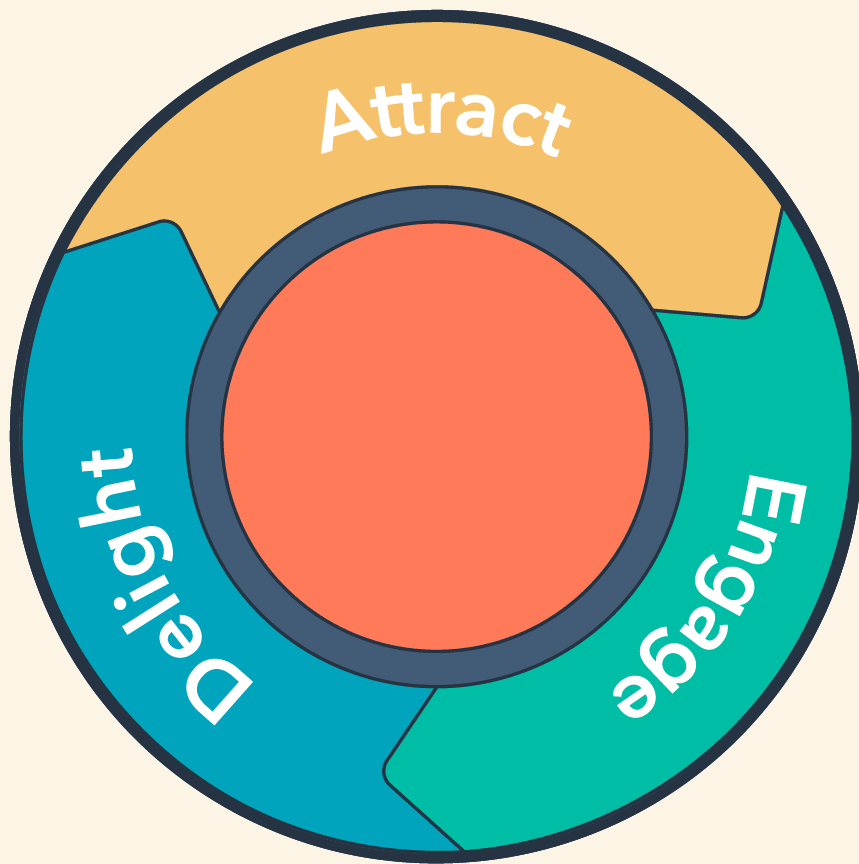
SEE OUR CARS



It's not what you sell that matters.  
It's how you sell it.



Add force.

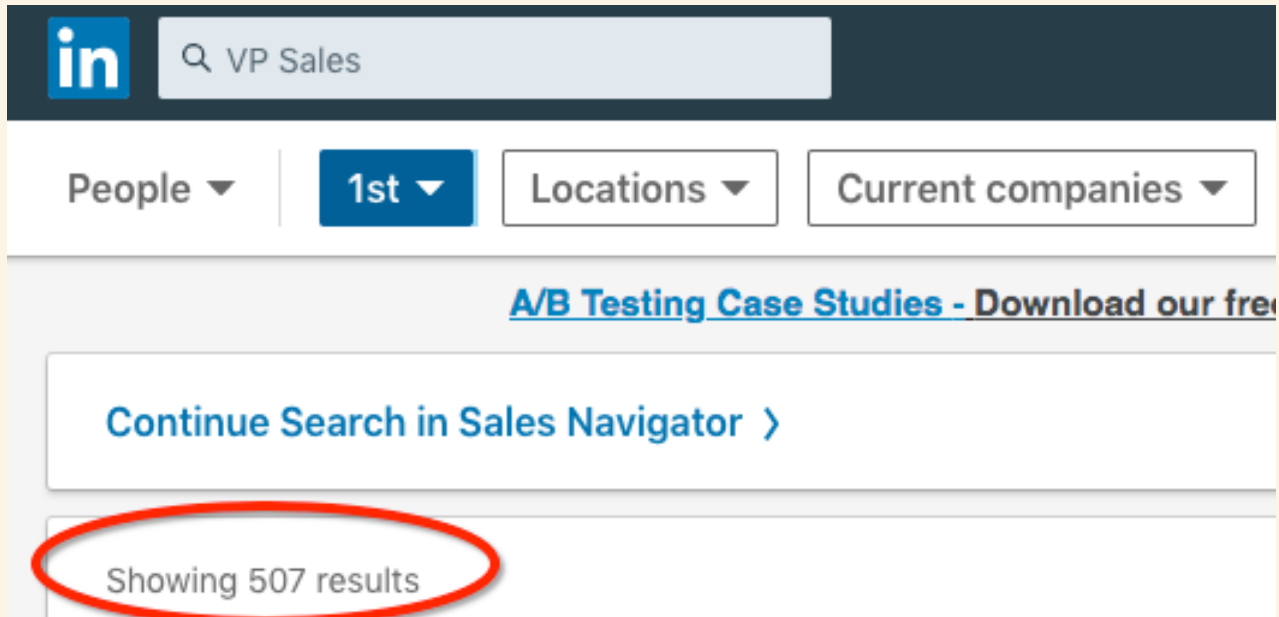


Reduce friction.





# VP Sales Priorities



The image shows a screenshot of a LinkedIn search results page. At the top, the LinkedIn logo is on the left, and a search bar contains the text "VP Sales". Below the search bar, there are four filter buttons: "People", "1st", "Locations", and "Current companies". The "1st" button is highlighted in blue. Below the filters, there is a link that says "A/B Testing Case Studies - Download our free". Below that, there is a button that says "Continue Search in Sales Navigator >". At the bottom, there is a box that says "Showing 507 results", which is circled in red.

in

VP Sales

People ▼

1st ▼

Locations ▼

Current companies ▼

[A/B Testing Case Studies - Download our free](#)

[Continue Search in Sales Navigator >](#)

Showing 507 results





Add force

Reduce friction



81%

19%





## Add force

2020 capacity and territory planning

Sales/CS account expansion strategy

getting inbound reps to do outbound (LOL)

develop inside sales coverage strategy for anz and apac

rolling out a new demo

Focus on increasing ACV

Targeting companies driven by the holidays before code freeze

Launching a football themed spiff with season, playoff and superbowl ticket prizes

Also just more activity :)



## Reduce friction



Coaching - getting managers to be better coaches and not just "manage", but push people to be better, teach them something new each week, etc.

sales productivity (enablement and efficiency metrics)

focusing our energy on the right type of accounts (ideal customer profile)

Remove sales friction



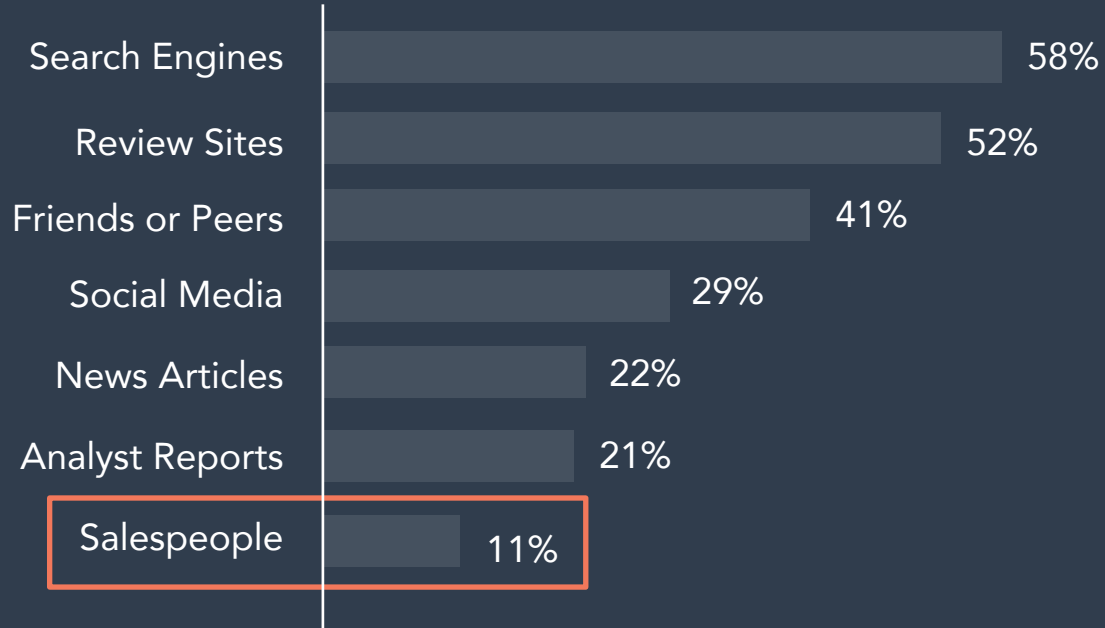


ATG

**HILTI**  
TE 30-A36

AVR

# Trust in sales is **dwindling**.







# Friction is everywhere in sales.

## Efficiency

33%

Of a sales rep's  
time is actually  
spent selling.

## Relationships

60%

Of B2B buyers  
distrust the  
integrity of sales  
people.

## Learning

50%

Of reps say they  
are coached. Yet  
82% of sales  
leaders claim to  
coach





# Frictionless Selling

# STEP 1:








## Simplify the sales rep's day

# Sales Rep Friction Table

Rank	Top tasks	Amount of time/ day	# of tools used	Friction
1	Day planning			
2	Research new leads			
3	Prospecting emails / calls			
4	Send follow-ups			
5	Qualifying leads			
6	Take & log call notes			
7	Customer calls			
8	Update lead / deal status			
9	Forecast & track progress			



# Sales Rep Friction Table

Rank	Top tasks	Amount of time/ day	# of tools used	Friction
1	Day planning	15 mins	2	
2	Research new leads	90 mins	3	
3	Prospecting emails / calls	90 mins	2	
4	Send follow-ups	45 mins	2	
5	Qualifying leads	30 mins	1	
6	Take & log call notes	45 mins	3	
7	Customer calls	120 mins	4	
8	Update lead / deal status	15 mins	3	
9	Forecast & track progress	15 mins	4	



# How you'll know it's working...

## KEY METRICS

Time to  
complete tasks



% of time  
selling



Quota  
attainment




Step 1: Simplify your sales reps' day

# HubSpot Pro Tips

# Sequences

[< Back](#)

New Sequence 

Owner: Jeff Russo [Save](#)

Steps

Settings

0 steps | 0 days to complete

A contact will be unenrolled from this sequence in any of [these cases](#)






Get started by adding an email template or task to your new sequence.



[Help](#)



# Task Queues

 [Contacts](#) [Conversations](#) [Marketing](#) [Sales](#) [Service](#) [Automation](#) [Reports](#)    

## Tasks

[Table](#) [Board](#) [Start queue](#) [Create task](#)

**Open tasks**

Due today

Due this week

Overdue

More

**QUEUES**

Calls

Follow Up Emails

+ Add a queue

Filter by: [Elise Beck](#) [All types](#) [All time](#) [Edit Columns](#)

<input type="checkbox"/>	STATUS	TITLE	TYPE	ASSOCIATED WITH	DUE DATE
<input type="checkbox"/>		Call Sarah		Sarah Gomez	Tomorrow at 8:00 AM
<input type="checkbox"/>		Call David Debrule		David Debrule	Tomorrow at 2:45 PM
<input type="checkbox"/>		Call Juan Miller		Juan Miller	Tomorrow at 2:45 PM
<input type="checkbox"/>		Call Angie James		Angie James	Tomorrow at 2:45 PM
<input type="checkbox"/>		Call Carlos Villalobos		Carlos Villalobos	Tomorrow at 2:45 PM
<input type="checkbox"/>		Call Taylor O'Neil		Taylor O'Neil	Tomorrow at 2:45 PM
<input type="checkbox"/>		Call Tom Sullivan		Tom Sullivan	Tomorrow at 2:45 PM
<input type="checkbox"/>		Email Taylor O'Neil		Taylor O'Neil	Tomorrow at 2:45 PM

Help

# Workflows

The screenshot displays the HubSpot Workflows interface. At the top, a navigation bar includes links for Contacts, Conversations, Marketing, Sales, Service, Automation, and Reports. A search icon, settings gear, and a user profile are also present. Below this, a breadcrumb trail shows 'Back to workflows' and the current workflow name 'Last Touch'. A status indicator shows 'Workflow is ON' with a checkmark. The main interface has tabs for Alerts, Set goal, Actions (selected), Settings, Performance, and History. On the right, there are buttons for Enroll, Test, and More. The central workspace shows a workflow diagram. It begins with an 'Enrollment triggers' box containing two conditions: 'Lifecycle stage is any of Sales Qualified Lead' and 'Last contacted is more than 2 weeks ago'. A link 'See all 4 criteria' is visible below these conditions. The workflow then leads to a 'Create a task' step, represented by a green circle with a laptop icon. On the left side of the workspace, there are zoom controls (+, -, 100%) and a 'Help' button in the bottom right corner.

Contacts ▾ Conversations ▾ Marketing ▾ Sales ▾ Service ▾ Automation ▾ Reports ▾

Search ⌕ Settings ⚙️ Notifications 🔔 User Profile

< Back to workflows Last Touch ✎ Workflow is ON ✓

Alerts Set goal **Actions** Settings Performance History Enroll Test More ▾

+  
-  
100%

**Enrollment triggers:**

Lifecycle stage is any of **Sales Qualified Lead**

and

Last contacted is more than **2 weeks ago**

✓ See all 4 criteria

+  
Create a task

Help

# Question and Answer Fields

The screenshot displays the HubSpot CRM interface. On the left, the contact profile for Taylor O'Neil is shown, including their photo, name, and contact information (email: taylorfoneil@gmail.com, phone number, and contact owner: Elise Beck). The main area shows a list of tasks, with the first task being 'Call Taylor'. A 'Playbook' modal is open, titled 'Discovery Call Script'. It provides a template for conducting discovery calls, including a list of steps: 1. Introduction and call agenda, 2. Understand company priorities/business model/players, 3. Sales and marketing process, current technology, and 4. Budget, Authority, Timeline. Below the steps, it says 'Below are some key questions and talk tracks to run your discovery call.' A question field is visible with the text 'What are the top initiatives at your company right now?' and three answer options: 'Improve close rates', 'Retain existing accounts', and 'Lead generation'. At the bottom of the modal, there are buttons for 'Log call' and 'Select an outcome'.

Contacts ▾ Conversations ▾ Marketing ▾ Sales ▾ Service ▾ Automation ▾ Reports ▾

< Contacts Actions ▾

Taylor O'Neil

Note Email Call Log Task Meet

▼ About this contact

First name  
Taylor

Last name  
O'Neil

Email  
taylorfoneil@gmail.com

Phone number

Contact owner  
Elise Beck

Activity Notes Emails Calls Tasks

Filter by: Filter activity (1)

Upcoming

Task

Call Taylor

Assigned to  
 Elise Beck ▾

Add description

> Details

Task

Email Taylor

Assigned to  
 Elise Beck ▾

**Playbook** — ✕

**Discovery Call Script**

Use this call template when conducting discovery calls with prospects. Generally, discovery calls follow this structure:

1. Introduction and call agenda
2. Understand company priorities/business model/players
3. Sales and marketing process, current technology
4. Budget, Authority, Timeline

Below are some key questions and talk tracks to run your discovery call.

What are the top initiatives at your company right now?

Improve close rates Retain existing accounts Lead generation

Log call Select an outcome ▾

Help

# STEP 2:

## Ruthlessly prioritize for your buyer

# Buying Experience Friction Table

	Decision-Maker	Champion	Influencer	Budget Holder
Research				
Qualification				
Proposal				
Negotiation				
Contract / Purchase				



# Buying Experience Friction Table

	Decision-Maker	Champion	Influencer	Budget Holder
Research		Personalized Playbooks to qualify & align		ROI calculator
Qualification				
Proposal	-Simplify proposals with transparent pricing and terms -Instant Meeting booking for follow-up			
Negotiation	Buy Online / e-Signature			Buy Online / e-Signature
Contract / Purchase				



# How you'll know it's working...

## KEY METRICS

Close rates  
over time



Selling  
velocity



Buyer /  
Prospect NPS




Step 2: Ruthlessly prioritize for your buyer





## HubSpot Pro Tips




# ABM



Contacts ▾ Conversations ▾ Marketing ▾ Sales ▾ Service ▾ Automation ▾ Reports ▾ Asset Marketplace ▾ Partner ▾



 biglytics.net ▾

## Target Accounts

Choose target accounts

Target accounts

All

No open tasks

No logged calls

No meetings

No open deals

No decision maker

Blockers

Find target accounts

Recommendations ⓘ

Prospects ⓘ

All owners ▾ Select teams ▾

TARGET ACCOUNTS

483

Total chosen companies

ACCOUNTS WITH OPEN DEALS

296

61% of target accounts

OPEN DEAL VALUE

\$420M

Avg \$138K per deal

MISSING ANY BUYING ROLE

337





70% of target accounts

MISSING DECISION MAKERS

345

71% of target accounts

Search target account 🔍

COMPANY ▾	CONTACTS ▾	OPEN DEALS ▾	OPEN DEAL VALUE ▾	LAST TOUCH ▾	LAST ENGAGEMENT ▾	SCHEDULED
 HubSpot	3509	780	\$54,719,292	a month ago Chris Alexis c...	3 hours ago Viewed document 1 -...	Nothing scheduled
 CAMILO OFFICE FURNIT	1	0	\$0	No outreach	a day ago Visited page	Nothing scheduled
 Bernie.com	1	8	\$523,000	20 days ago Dana Rosen c...	a day ago Visited page Webina...	Nothing scheduled
 toyota	3	2	\$0	7 months ago Jacob Carlso...	3 days ago Visited page Wistia V...	Nothing scheduled

Help

# Conversations

[Back to chatflows](#)Qualified Prospects | Pricing Page ChatflowPreview✓

**1 Build**

Create a welcome message to greet site visitors.

**2 Who**

Decide who should see this chatflow.

**3 When**

Decide when to show the chatflow on your site.

**4 Options**

View and manage your chatflow settings.

## Welcome message

Customize the message visitors will see when they first arrive on your specified website pages.

Chat heading ⓘ

Contact owner

New visitor fallback

Specific users and teams

Elise Beck ✕

Write a welcome message ⓘ

Have questions? I'm happy to help.

316

Automatically assign conversations

Elise

August 19

Have questions? I'm happy to help.

Help

# Video






The screenshot displays the HubSpot CRM interface. At the top, a dark navigation bar contains the HubSpot logo and menu items: Contacts, Conversations, Marketing, Sales, Service, Automation, and Reports. On the right of this bar are search, settings, notifications (with a red badge showing '1'), and a user profile icon.

The left sidebar shows the 'Contacts' view for a specific contact, Taylor O'Neil. It includes a profile picture, the name 'Taylor O'Neil', and a row of action buttons: Note, Email, Call, Log, Task, and Meet. Below this is a section titled 'About this contact' with fields for First name (Taylor), Last name (O'Neil), Email (taylorfoneil@gmail.com), Phone number, and Contact owner (Elise Beck).


The main content area is titled 'Emails' and shows a list of email activities. The top of this section has buttons for 'Log Email' and 'Create Email'. Below this, a card for an email sent on 'Aug 15, 2019 at 4:54 PM EDT' is displayed. The email subject is 'Quick follow-up'. Below the subject, it shows 'Sent', 'Opens: 0', and 'Clicks: 0', with a 'Details' button to the right. The email body text reads: 'Hi Taylor, I noticed that at the end of sales training you didn't purchase Biglytics and we'd love to know why. Any feedback you can give us would be very helpful.' Below the text is an 'Expand' link. At the bottom of the email card, it shows 'E Elise Beck to Taylor O'Neil' with a 'Details' link. A 'Reply' button is at the bottom left of the email card.


A 'Help' button is located in the bottom right corner of the interface.

# Meetings


 [Contacts](#) [Conversations](#) [Marketing](#) [Sales](#) [Service](#) [Automation](#) [Reports](#)    




Meetings

Success Successfully saved meetings link. 

Create meeting link 

Fill your calendar with meetings - automatically. Unlock premium features with [Marketing Professional](#). [Upgrade](#)

New feature. Now you can have more control over your meeting confirmation emails. [Show me](#) 

MEETING	DURATION	TYPE	VIEWS 	MEETINGS BOOKED	CONVERSION RATE
<a href="#">60 min, 30 min, and 15 min meeting</a> (default)	60 min, 30 min, and 15 min	Personal	2	3	150.0%
<a href="#">consultation</a>	20 min	Round Robin	1	0	0.0%
<a href="#">15 Minute Demo</a>  	15 min	Round Robin	0	0	N/A

Waiting for api.hubspot.com...

Help

# STEP 3:

## Create a culture of learning

# What does great coaching look like?



Ability to uncover issues



Hands-on review with reps



Provide actionable feedback



Build trust



# Coaching Friction Table

	Uncovering Issues	Hands-on Review	Providing Feedback	Trust-building
1				
2				
3				
4				
5				



# Coaching Friction Table

	Uncovering Issues	Hands-on Review	Providing Feedback	Trust-building
1	No probing or discovery	Rep self-reports recent call	Feedback lacks specificity and/or clarity	Seller has little or no access to manager
2	Manager asks general/generic questions	Manager probes for info on specific customer interactions	Manager sugarcoats feedback and prevents seller from understanding specific process or behavior changes are requested	Manager dominates conversations during one-to-one meetings
3	Manager uses open ended questions	Manager joins or reviews specific customer interactions	Manager provides feedback but discourages seller from expressing a difference of opinion	Manager asks questions but might not act on answer given
4	Manager uses open ended questions and probes (2 <sup>nd</sup> or 3 <sup>rd</sup> layer)	Manager joins / reviews calls and provides feedback when asked	Manager provides actionable feedback in a tone that demonstrates challenges and collaboration are encouraged	Manager actively listens to sellers and takes action to help
5	Manager uses open ended questions and probes while uniting with seller to tackle the problem (not the person)	Manager pro-actively joins / reviews calls and proactively provides recommendations	Manager provides detailed, actionable feedback and along with it encourages challenges and collaboration	Seller views manager as their most important internal ally





# How you'll know it's working...

## KEY METRICS

Lower rep  
attrition



Higher PPR  
(Productivity  
per Rep)



Employee  
NPS



Step 3: Create a culture of learning

## HubSpot Pro Tips

# Dashboarding (Reactive / Proactive)

## Reactive

- Unworked QL's
- Unrated Reconverts
- Unworked High/Med
- High/Med w/o Next Activity

The screenshot displays a CRM dashboard with a dark blue header containing navigation links: Contacts, Conversations, Marketing, Sales, Tickets, Sequences, and Reports. The main content area is titled "Sales - Reactive View of the World | MidMarket/Corp (No need to Clone)". Below the title, there's a filter section with "Filter dashboard" and "Owners: 2 owners". The dashboard is divided into four main sections:

- My Unworked QLs (MQL, PQL, SQL)**: A table showing leads with columns for CONTACT, RECENT QL DATE, RECENT QL TYPE, WEBSITE URL, and LAST CONTACTED. The data is filtered for the last 90 days and 2 owners.
- My Unworked High/Medium Rated Reconvert Companies**: A table showing companies with columns for WEBSITE URL (PARSED), LIKELIHOOD TO CLOSE, LAST ACTIVITY DATE, RATING, and ALEXA RANK. The data is filtered for all time and 2 owners.
- My Unrated Reconverts**: A section on the right showing a list of companies with links to their profiles.
- My High/Medium Rated Reconvert Companies**: A section on the right showing a list of companies with links to their profiles.

**My Unworked QLs (MQL, PQL, SQL)**

CONTACT	RECENT QL DATE	RECENT QL TYPE	WEBSITE URL	LAST CONTACTED
Monique Meyer	5/1/2019	Book a Meeting	http://charterschoolassociates.com	-
Lisa Macaulay	4/30/2019	SQL	http://swishclean.com	4/29/2019
Joel Musambi	4/15/2019	Hand Raise	http://deskribbles.com	3/25/2019
Signal Creative Community	4/15/2019	Hand Raise	http://createsignal.com	-
Gurmeet Judge	4/4/2019	Demo	http://encompassbt.com	3/15/2019
Virgile OLLIVIER	4/3/2019	Hand Raise	http://www.livescale.tv	-

**My Unworked High/Medium Rated Reconvert Companies**

WEBSITE URL (PARSED)	LIKELIHOOD TO CLOSE	LAST ACTIVITY DATE	RATING	ALEXA RANK
nashvillerescueemission.org	47.87	3/29/2019	Medium	-
1800petmeds.com	40.54	4/1/2019	Medium	38,244
hippomanager.com	37.95	2/7/2019	Medium	4,069,498
jagoehomes.com	36.35	1/18/2019	Medium	3,102,122

**My Unrated Reconverts**

COMPANY
CrewBloom
Greenbox Capital
Cloud Accel, Inc.
Toshiba Business Solutions
Transcend Credit Union
DEAN PHC

**My High/Medium Rated Reconvert Companies**

WEBSITE URL (PARSED)
gps.edu
flexoffers.com
allergystore.com
ironsolutions.com

# Dashboarding (Reactive / Proactive)

## Proactive

- Closed Lost
- Recent Funding
- Datanyze
- Engaged portals
- Recent QL's

The screenshot displays a CRM dashboard with a top navigation bar containing links for Contacts, Conversations, Marketing, Sales, Tickets, Sequences, and Reports. The main content area is titled "Sales - Proactive View of the World | MidMarket/Corp (No need to Clone)". Below this, there are two primary data sections:

**Prospecting | My Closed Lost Companies**

Date range: All time | Owners: 2 owners

COMPANY	WEBSITE URL (PARSED)	RECENT DEAL CLOSE DATE	ALEXA RANK	ASSOCIATED DEALS	LIKELIHOOD TO CLOSE	LAST CONTACTED
Courthouse Retrieval System	crsdata.net	2/23/2012	56,506	4	26.35	3/12/20
RSS	qsrss.com	-	9,547,651	1	0.81	4/1/20
BigAl'sPets.ca	bigalspets.ca	9/30/2018	16,000,001	17	-	-
litterlockplus.com	litterlockplus.com	-	16,000,001	1	11.31	9/4/20
Rabuse & Associates, LLC	rabuse.com	10/30/2017	14,825,944	1	-	10/30/20

**Prospecting | My Recent QLs Last 90 (MQL, PQL, SQL)**

Date range: In the last 90 days | Owners: 2 owners

CONTACT	RECENT QL DATE	RECENT QL TYPE	WEBSITE URL	LAST CONTACTED
Cristina Yulo	3/13/2019	Book a Meeting	http://www.daisyintelligence.com	5/2/2019
Victoria Wong	5/2/2019	Hand Raise	http://food.ee	5/2/2019
Haji Womack	2/11/2019	Hand Raise	http://www.goteachersintouch.com	2/13/2019
Katherine Wittman	2/21/2019	Book a Meeting	http://cam-do.com	4/19/2019

On the right side of the dashboard, there are additional sections for "Prospecting | My..." with filters for date range and company lists, including entries like MD Financial Management, InnerSpace, TheGuarantors, NarrativeDx, Sampler, Intex Membranes, Real Time Cloud Services, Thirdhome, and PortaGrace Manufacturing.

# Call Transcription & Recording

The screenshot displays the HubSpot CRM interface for a contact named Sarah Gomez. The top navigation bar includes links for Contacts, Conversations, Marketing, Sales, Service, Automation, and Reports. The left sidebar shows the contact's profile, including a photo, name, title, and various action buttons (Note, Email, Call, Log, Task, Meet). The main content area shows a call log for August 2019. The first call is a 'Discovery Call with Sarah Gomez @ Costar Video Systems' on Aug 19, 2019, at 10:20 AM EDT. It shows an 'Outcome' of 'Connected' and a duration of 0:00 to 27:14. Below the call details is a 'Call transcript' button. The second call is a 'Left Voicemail' on Aug 19, 2019, at 10:15 AM EDT, with an 'Outcome' of 'Left voicemail'. A 'Help' button is visible in the bottom right corner.

Contacts ▾ Conversations ▾ Marketing ▾ Sales ▾ Service ▾ Automation ▾ Reports ▾

< Contacts Actions ▾

**Sarah Gomez**   
Marketing Strategist at Costar Video Systems

Note Email Call Log Task Meet

▼ **About this contact**

First name  
Sarah

Last name  
Gomez

Email  
s.gomez@costarvideo.com

Phone number  
877) 929-0687

August 2019

**Call** Aug 19, 2019 at 10:20 AM EDT

Discovery Call with Sarah Gomez @ Costar Video Systems

Outcome  
**Connected** ▾

0:00 27:14

Call transcript

**Elise Beck**  
to Sarah Gomez +1 (469) 635-6800 [Details](#) ▾

**Call** Aug 19, 2019 at 10:15 AM EDT

Left Voicemail

Outcome  
**Left voicemail** ▾

[Help](#)

# Playbooks

[Back to playbooks](#)[Publish](#)

Published

WriteSettings

Preview

ParagraphB I [Icons] Insert

## How to Demo

Once you've qualified a sales lead, create a deal to indicate and track the revenue opportunity. By associating your deal with contacts and companies in your HubSpot account, you can view context from all relevant records in one place.

### When to create a deal

You can use the contact properties "lifecycle stage" and "lead status" to help qualify prospects or leads until you've received or noted a strong level of interest or revenue opportunity.

### Creating a deal

Help



# Grow Better