

# Guided

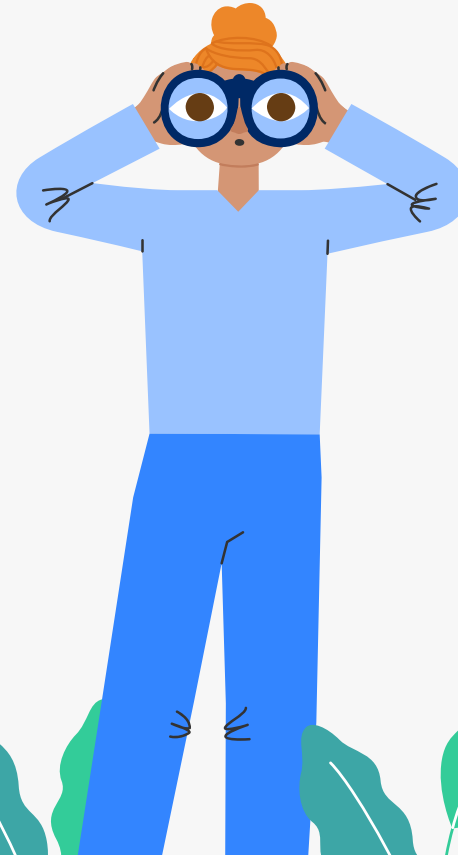


# Selling

The Definitive Guide  
to Winning with Guided  
Selling Solutions

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# What is Guided Selling?

# What is Guided Selling?



"Intended to augment more traditional sales tools, such as sales playbooks, algorithmic-guided selling uses sales data to boost the seller's ability to engage with prospects..."

Algorithmic-guided selling leverages artificial intelligence technology and existing sales data to guide sellers through deals, automating manual sales actions while reducing the need for individual seller judgment in the sales process."

## Gartner

Source: Tad Travis in *Algorithmic-Guided Selling to Have Significant Impact on Sales Productivity*  
by Gartner

# What is Guided Selling?



“It’s a system that leverages data to guide sellers through their sales process. Guided selling gives a rep a better way of selling to customers by recommending paths or steps based on data, not instinct...”

The next time you hear about the role of AI in sales, ask yourself — does it fit into a guided selling system to help me sell better, sell more, and sell faster? If yes, then it’s probably worth paying attention to.”



Source: Raymond Juarez in *Guided Selling — A Framework for AI in Sales* from Quotable (a Salesforce Publication)

“Nearly **51%** of sales organizations have already deployed or plan to deploy algorithmic-**guided selling** in the next five years.” - Gartner

“Guided selling is about getting suggestions or recommended actions that a seller can take in the context of their workflow every day.” - Dan Gottlieb



Dan Gottlieb (TOPO, a Gartner company) in *Why is Guided Selling the Next Big Thing?* by ringDNA

**TOPO**

“Guided selling stands out as one of the most sophisticated and complex sales execution technologies to improve sales productivity.” - Tad Travis

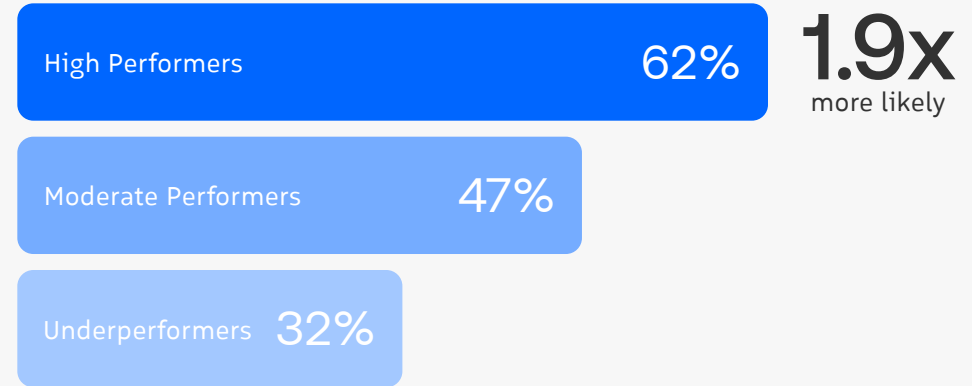


Tad Travis in *Algorithmic-Guided Selling to Have Significant Impact on Sales Productivity* by Gartner

**Gartner**

"**62% of high-performing salespeople** foresee a **big role for guided selling** that ranks potential opportunity value and suggests next steps. Across the board, top teams are nearly twice as likely as underperformers to anticipate an **important role for AI** in their work over the coming years." – Salesforce State of Sales Report, 3rd Edition

*State of Sales, 3rd Edition*  
by Salesforce





**Howard Brown**  
Founder & CEO  
ringDNA

"When you know what winning deals looks and sounds like, you know exactly where to focus to improve outcomes.

Guided selling uses artificial intelligence to provide revenue teams with tools, insights, and next best actions necessary to win deals, grow accounts, maximize revenue."

Source: Howard Brown in *Why is Guided Selling the Next Big Thing?*  
by ringDNA





**Debbie Bender**

Sr. Analyst & Analyst  
TOPO (a Gartner company)

**TOPO**

“A lot of what we see in sales engagement and sales acceleration is about being reactive...but we also need to be very proactive in how we're working with and addressing the market.

That's what is different and hugely beneficial about guided selling to anyone across the entire go-to-market organization.”

Source: Debbie Bender  
in *Why is Guided Selling the Next  
Big Thing?* by ringDNA

# The Next Evolution of Sales Technology

As AI has progressed and sales teams have uncovered existing gaps in the current technology landscape, a new category is emerging. Drawing from the best that sales

enablement, sales engagement and conversation intelligence have to offer, guided selling represents the next step in the evolution of sales technology.

## Guided Selling

AI-powered application that boosts sellers' ability to engage with prospects and guides sellers through deals, automating manual sales actions while reducing the need for individual seller judgment in the sales process:

- Prioritized next best actions for accounts, leads and deals
- Recommended messaging
- Dynamic prioritization based on historic and real-time data
- Recommended content for specific buyers and buyer stages
- Automated playbook guidance
- Continuous optimization based on results analysis to further improve outcomes

## Sales Engagement

- Multichannel communication scheduling (sales cadence/sequence)
- Sales email automation
- A/B testing capabilities
- Lead prioritization

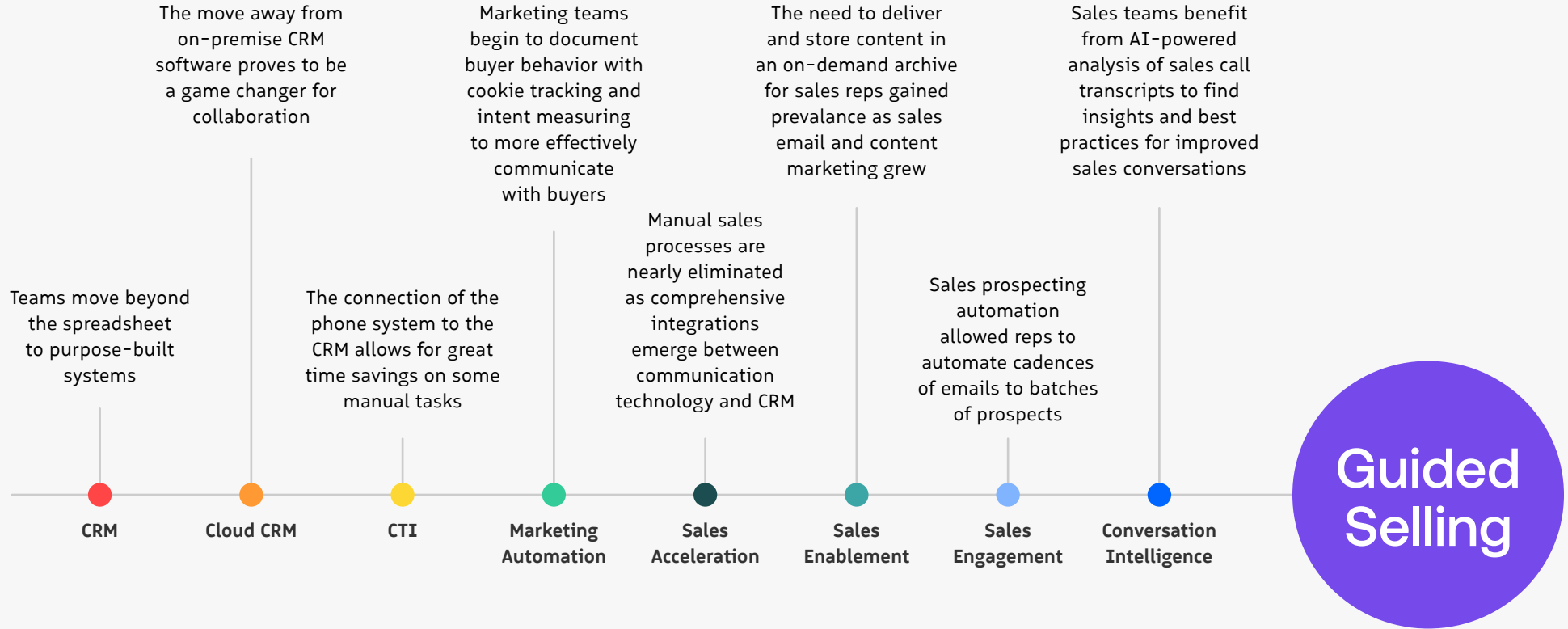
## Conversation Intelligence

- AI analysis of past sales conversations
- Surfacing of conversation data insight after the call occurs
- Leveraging call etiquette metrics to coach reps and improve sales call outcomes

## Sales Enablement

- Centralized content and learning repositories
- Static content prioritization
- LMS
- Slide storage
- Content usage & value metrics

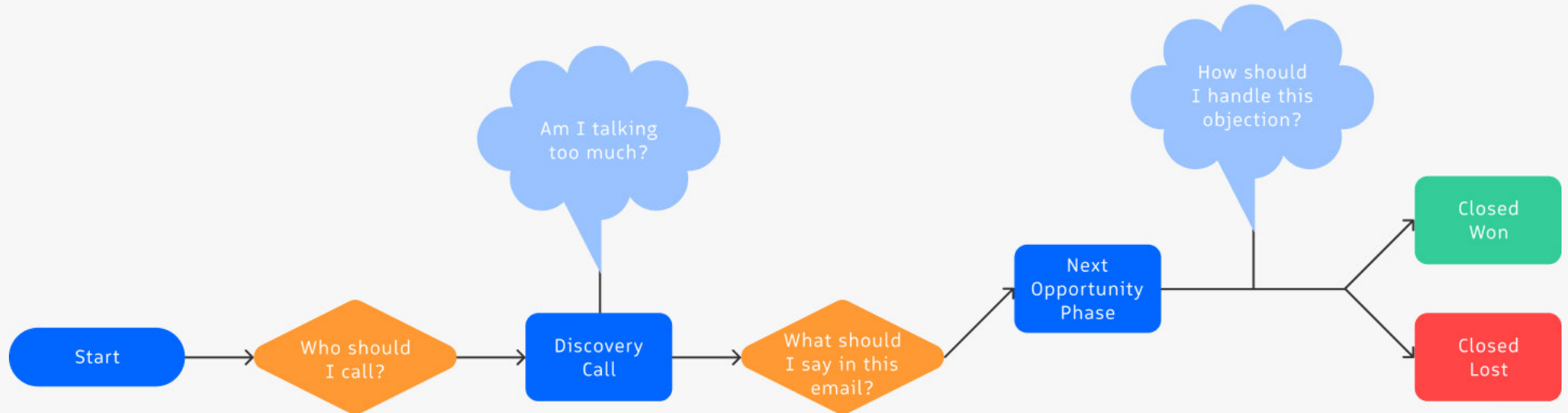
# The Rise of Guided Selling



# Why is Guided Selling Needed?

# Rep Decisions Are Key

Sales is a series of choices and decisions.  
These decisions directly affect revenue outcomes.



# Hope is Not a Strategy



**Phoebe Conybeare**

Sales Development Analyst  
TOPO (a Gartner company)

**TOPO**

“It’s a fool’s errand to expect a 22-year-old sales development rep (SDR) fresh out of university to develop a consistent, scalable, repeatable prioritization, execution, and qualification process.

Be prescriptive in your expectations and methodical in the tools you arm your teams with...for the overwhelming majority of your team—who have never held full-time, quota-carrying roles and aren’t able to think strategically yet—you must be prescriptive.

You need to show them how to think strategically and tactically as they approach their daily work.”

# The Rising Tide of Buyer Expectations

Buyers' expectations are higher than ever:

Communication via their  
channel of choice

A rep that is completely  
responsive, yet not pushy

Near-instant  
response times

Accurate, valuable  
information or insight

A consultative selling  
experience, where they  
feel heard

Business acumen and  
subject matter expertise

# Inefficiencies Plague the Sales Process

A recent ringDNA study found that improving revenue and operational efficiency is the number one need for sales teams in 2020 and beyond.

Sources: *State of Sales, 3rd Edition*  
by Salesforce

*Selling Forward Research Report*  
by ringDNA

According to Salesforce, five of the top ways reps waste time include:

**Prioritizing  
leads and  
opps**

**Data entry**

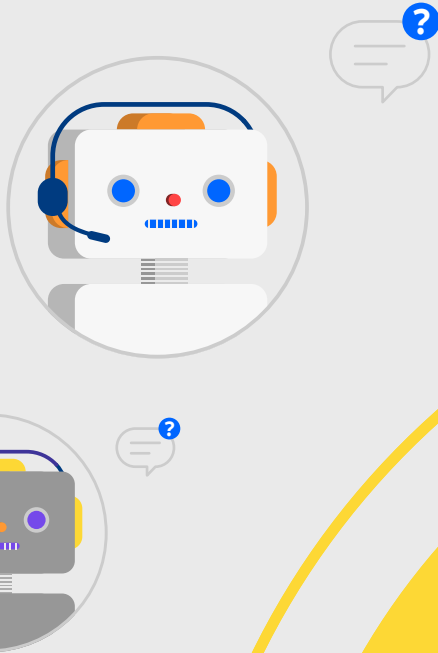
**Prospect  
research**

**Preparation  
and planning**

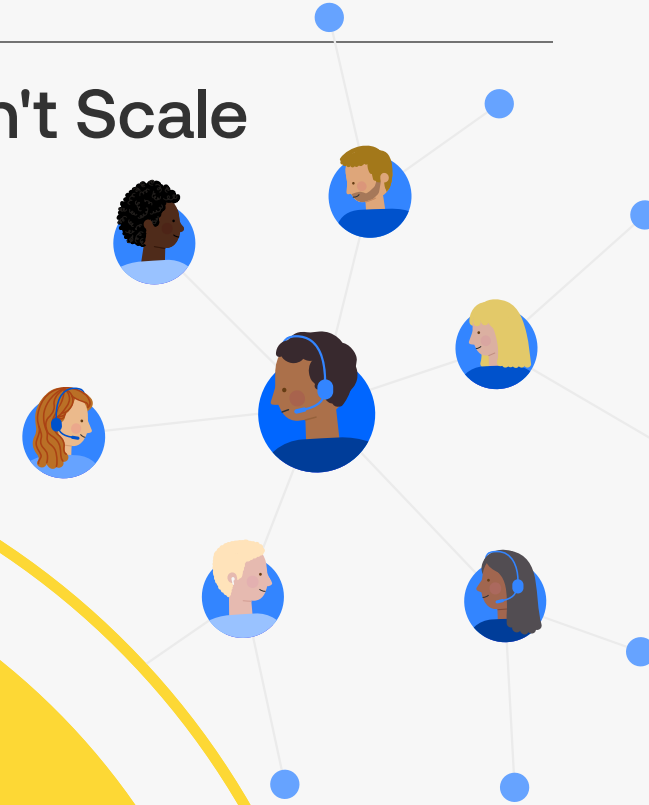
**Administrative  
tasks**



## Robots Can't Sell



## Humans Can't Scale



**AI & intelligent automation make humans better.**

A whopping **75% of sales leaders expressed optimism** on a ringDNA survey about the **ability of AI to improve selling** in the near future.

Source:  
*Selling Forward  
Research Report*  
by ringDNA

# 17 Common Challenges Solved by Guided Selling

# Empowering Outbound Sales Teams

Also known as outbound prospecting, the practice of outbound sales involves reaching out to large lists of target customers via multiple communication channels. Although Sales Engagement has been seen as the solution for this business strategy over the last few years, the market has begun to recognize the need to remove guesswork from the sales process and avoid the pitfalls of “spray and pray”

cold sales email cadences. Even with sales engagement technology in place, sales teams, especially those employing an account-based sales model, typically waste time building lists of accounts and contacts manually, while lacking the knowledge of which actions will drive the best outcomes.

OUTBOUND CHALLENGES	BUSINESS IMPACT	GUIDED SELLING SOLUTION
We need more predictability in our revenue from outbound sales.	Stagnant, fluctuating or declining revenue from outbound methods is commonly caused by a lack of adoption of the sales leader’s proven playbook.	Build the perfect playbook for each lead source or type once, scale across entire lists, then measure results and improve over time.
Reps waste time on manual sales efforts.	Teams that fail to adopt technology that eliminates manual CRM data entry fall behind competition who can outpace them with more productive sales teams.	Automatically log every activity with prospects and customers, learn from interaction patterns, and resurface the data at the exact moment a rep needs it to empower more customer conversations.
Reps aren’t engaging the right leads and accounts.	Having unfocused sales reps leads to a host of problems, including priority leads being missed or reps being misaligned with key strategic initiatives.	Surfacing the next best actions to take on the right accounts for sales reps so there is never confusion about who to reach out to or when.
Managers lack the insight they need into outbound sales performance.	Without a clear picture of who to manage or where to focus, managers apply their attention at random.	Uncover management insights on where to focus energy for coaching, at-risk deal aid or training.

# Prioritizing Inbound Sales Workflows

With more and more of the buying process taking place as a prospect does their own research without the help of a salesperson, inbound sales is continuing to grow in importance. Regardless of if sales teams are tackling leads generated by website

forms, fielding inbound phone calls, or engaging with prospects via website chat, the importance and value of inbound leads cannot be overstated.

INBOUND SALES CHALLENGES	BUSINESS IMPACT	GUIDED SELLING SOLUTION
Reps miss hot leads because they are overwhelmed with large, unprioritized lead lists.	Revenue is “left on the table” as reps miss leads altogether.	Surfacing the hottest leads and keeping reps aware of their priorities as they work through curated lists of next best actions.
Overall hot lead response time is missing the mark.	Revenue is “left on the table” as reps miss the crucial lead response window and prospects take their business elsewhere or their priorities shift.	Quickly shifting rep priorities from non-urgent work to respond to hot inbound leads when they arrive.
Reps waste too much time preparing for calls to inbound leads.	The overall velocity of a sales team becomes inefficient as reps are bogged down in call prep and spending less time with customers.	Contextual data and relevant prospect information is surfaced before and during the conversation, reducing the need for arduous prep time and improving the quality of the conversation.
Reps are unprepared for calls to inbound leads (can be especially prominent when fielding inbound phone calls).	Inbound opportunities are missed when reps fail to demonstrate value to the prospect or earn their trust.	Reps only receive the calls and leads that fit their skills or knowledge, and are given contextual data to improve the quality of their conversation, leading to better outcomes.

# Bringing Reps to Full Productivity Faster

A consistent challenge for sales leaders involves bringing new hires up to full productivity as fast as possible. The sooner the reps are “ramped” and have reached full quota, the more revenue they generate over time and the business has a better

chance at achieving positive ROI on the cost of hiring the rep. No matter what method a business uses to generate revenue, improving the performance of new hires is a universal approach to improving growth strategies.

ONBOARDING CHALLENGES	BUSINESS IMPACT	GUIDED SELLING SOLUTION
It takes too long to train our new sales hires on our products and competitors.	While helpful for rep learning, customer and prospect conversations fielded by new hires are often wasted opportunities.	Surface product and competitor information in real-time, triggered by conversation keywords to equip new reps to answer customer questions like an expert.
Reps forget 90% of sales training within days of receiving it.	With no reinforcement, sales training becomes wasted expenditure and effort, and is inefficient at best.	Reinforce training over weeks and months after training occurs, and allow sales leaders to monitor the outcomes of training over time.
Onboarding experiences are inconsistent, leading to inconsistent performance for sales teams.	This typically reinforces the unhealthy 80/20 distribution of the average sales team where 20% of reps drive 80% of a team’s revenue.	Curate libraries of best practices and key training moments to give new hires uniform, top-quality predictable onboarding.
Playbook execution is inconsistent.	Messaging, approaches and results are inconsistent across the business.	Sales leaders can prescribe their playbook across every lead type and source, ensuring reps execute perfectly.

# Enabling Account Based Selling Initiatives

While account based strategies are not necessarily a new approach for sales teams, the extra effort it takes to stay in lockstep with the hyper-personalized, targeted

approaches taken by marketing teams requires an uninhibited flow of information between marketing campaigns, results, and sales teams.

ABS CHALLENGES	BUSINESS IMPACT	GUIDED SELLING SOLUTION
Reps waste time finding contact information rather than working through strategic lists.	ABS becomes inefficient, and reps end up spending more time pulling information together than they do actually selling to customers.	All contact information and relevant details surfaced automatically at the optimal time for reps to reach out and execute.
Reps lack context when engaging target accounts.	In-depth, informed account conversations that are required from the start when executing ABS motion fail to materialize.	Reps are delivered complete context as needed before and during conversations, so they can easily pick up where the last rep left off.
Information for the account based strategy becomes siloed or spread across too many documents.	Parts of the account-based strategy either have no execution or occur out of order as reps operate off of an incomplete picture of the strategy.	Information is centrally stored in the CRM where reps work, guided selling technology simply surfaces the information that reps need in the moment without working across disparate systems.

# Empowering Remote Sales Performance

Remote selling is the new normal preferred by sales teams. A recent ringDNA study found that 84.4% of sales leaders feel that teams are as productive or even more productive when working remotely. Remote selling still presents challenges

and it can be incredibly hard without the right infrastructure and tools in place to make the approach work.

REMOTE SALES CHALLENGES	BUSINESS IMPACT	GUIDED SELLING SOLUTION
Reps, especially new hires, lose the benefit of learning from others in a “sales floor” environment.	Tribal knowledge fails to develop, leaving reps to figure out solutions on their own or work with whoever they are most comfortable with, often to mixed results.	Reps benefit from consistent guidance developed with best practices from around the team.
Managers must work harder to keep their finger on the pulse of the sales team and pipeline.	Managers miss out on key moments in opportunities and are unable to identify when they need to join the conversation to help a business along.	Guided selling both allows manager insight and guidance to be present in every customer interaction, while also surfacing moments that allow sales leaders to apply their time in the optimal way.
Reps must work harder to connect with prospects and customers virtually.	Similar to in-office working conditions, failing to develop rapport and build trust with prospects often leads to other companies earning their business.	Guided selling technology can identify prospect or customer cues and alert the rep in the moment, leading to a more fruitful conversation.



**Howard Brown**  
Founder & CEO  
ringDNA

“Guided selling is a total game changer for sales teams, as it uses AI to focus reps on next best actions while empowering them to build stronger relationships and better solve customer problems.”



# Thank You

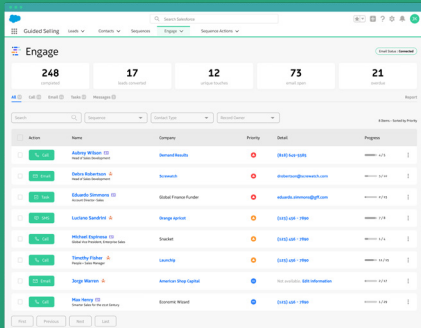
Learn more about Guided Selling  
at [ringdna.com/guidedselling](https://ringdna.com/guidedselling)

# Minimize Guesswork. Maximize Revenue.



## guidedSelling

Get real-time sales guidance that lets reps know in real time **who** to reach out to, **how** to reach out and **what** to say with Guided Selling by ringDNA, a Native Salesforce solution.



- Take the Next Best Action, Every Time
- Train New Sales Reps Faster Than Ever
- Scale the Expertise of Top Performers

### TAKE THE NEXT BEST ACTION, EVERY TIME

Leverage the expertise and best practices of top sales performers to make inexperienced reps sell like seasoned ones.

### TRAIN NEW SALES REPS FASTER THAN EVER

Dramatically reduce the time required to bring reps to full productivity by using AI to help every rep sell like an expert.

### LEVEL UP BOTH INBOUND AND OUTBOUND SALES

Ensure predictable cadences for account based sales (ABS) campaigns as well as rapid lead response and follow-up from inbound leads.

### SCHEDULE MULTICHANNEL SALES CADENCES

Easily schedule automated sales outreach that include calls, texts, email, social engagements and more to maximize conversions and drive pipeline.

### KEEP REPS FOCUSED

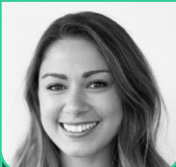
Guided Selling lives right in Salesforce, where your reps already work. Maximize the investment your team has already made in the CRM and take performance to the next level.

### GET REAL-TIME PERFORMANCE INSIGHT

All sales activities and communications are captured in Salesforce. Detailed reports & dashboards uncover what is working and what needs improvement for continuous growth.

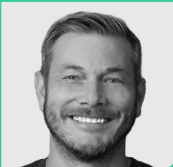
"We have seen dramatically faster ramp time for our sales development reps."

"The best solution for Salesforce customers."



**Stephanie Sullivan**

Director of Growth Operations  
ChowNow




**Sean Whitely**

Founder  
Qualified


# Elevate Productivity with Optimized Sales Playbooks for Inbound and Outbound Engagement.





 Dynamic Lead and Account Prioritization

 Account Based Selling


 Touch Patterns Based on Best Practices


 Dynamic Email Personalization

 Centralized View of Daily Tasks

 Task Scheduling

 SMS Text Scheduling

 Real Time Performance Insights

 Centralized Sales Messaging

Book a Demo Today at [ringdna.com/guided-selling](https://ringdna.com/guided-selling)

## Other ringDNA Solutions

### callTracking

**Track ROI and empower reps to close more deals from inbound.**

Real-time inbound call campaign attribution and intelligent routing provide reps with campaign-based call scripts and historical information to convert more callers into customers, while helping marketing measure marketing ROI from inbound calls.

### intelligentDialer

**High velocity outbound and inbound dialer, email and SMS.**

For higher connect rates, smarter conversations, and more revenue. Automatically captures all sales activity in Salesforce.

### realTime

**Enable even new reps to navigate sales conversations like a pro.**

Suggests dynamic talking points, content recommendations and next best actions in real time to improve live call and video performance.

### conversationAI

**AI-powered conversation intelligence that makes managers and reps more productive and effective.**

Surfaces key coachable moments. Build custom libraries for continuous learning.

To learn more about Guided Selling by ringDNA and how ringDNA can help your business increase sales opportunities and scale revenue growth, please visit [ringdna.com/guided-selling](https://ringdna.com/guided-selling) or download it on the Salesforce App Exchange