



EQ+Execution™

# Moving your Sales Team to Virtual: Keys to Build Revenue through Relationships in a CV-19 World

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## Note from the Kothari Leadership Team

During this time, our thoughts are with you, your families and your teams. As we are driving change with our clients, we wanted to ensure those learnings were available to anyone who wanted to adapt. We hope these real-time insights will help inspire you and your business to be resilient, as well as educate as your business adjusts to the new realities of remote working environments.

This will be a series that delivers targeted key learnings on topics that are making a difference.

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*“My customers are used to seeing my team in person from day one. Our relationships thrive face-to-face, and we have to pivot to a digital sales model on short notice. It’s important that I have a sales team that is confident, rather than feeling discouraged because they are out of their element.”*

*-Aaron Hageman, CEO, Delivery Drivers, Inc.*

## Strategic Mindset: Is it even a good time to reach out to new prospects?

### Who you are is more important than what you do at this time

The initial period of CV-19 shock is passing and people are settling into daily life at home, **so** people want to talk to emotive, intelligent people. Events and travel once littering calendars are no longer there. Leaders have more time to think of the long-term.

**Key Thought:** During this time, what energizes people is likely even more personal. **Key Example:** *A client of ours learned their customer was sick and sent them a chicken soup box to their home. What loyalty did they build? They surpassed the competition!*

Remind your prospect that you're part of their resource and support framework. Couple your ideas with a positive energy of service, and you may be the highlight of their day. One of our clients reported that with this method, they got appreciation for “the time to ideate and release pent up thoughts in a safe space.”

**You can create a personal connection if you use technology well.**

With CV-19, tech-solutions like video conferencing have become mainstream and forced even the most reluctant businesses to move online (and even weddings!).

**Key Thought:** If you fumble in video chat, you look old-school and incompetent. Your brand will suffer. **Key Example:** *A client was trained by Zoom and learned a new collaboration tool called Miro. Their customer was impressed with the online meeting management.*

It's a good time to modernize with tools like video, CRM and remote collaboration tools, not only for today, but to set up your company for success in the future. Think about key relationship building and collaboration steps in your sales process...and think about the technology that will boost the experience remotely, individually and in groups.

**EQ+Execution Boost:** Be bold and consider what new customer needs may have arisen during this time.

**Key Thought:** FIRST of all, many people are shell-shocked with what has happened. Provoke your mindset; get into action and reach out. Many people are stuck and retreating into themselves. Be in service to your customers. Leap over your competition while they are standing still!

Many popular sites and advisors will say to focus on your existing customers. We agree existing customers are priority and your attention during challenging times will be appreciated as things recover.

**Seismic shift:** It will be valuable to consider new clients. Some of you may dedicate only 10% to new business, which is critical for emerging opportunities as our economy continues to shift. For others, new business may be critical now. Are there new target customers you could serve who are rapidly growing right now? Have competitors shifted and left a gap in the market?

**Key Thought:** Do research into the top 100 industries through sources like LinkedIn or local news to identify new targets. For any strong customers you do have, find their peers and this is a good time to ask your key customers to refer you to their network. **Key Example:** *We have*

one client who was able to pivot and even expand his last mile delivery service by addressing an immediately growing need for medical couriers.

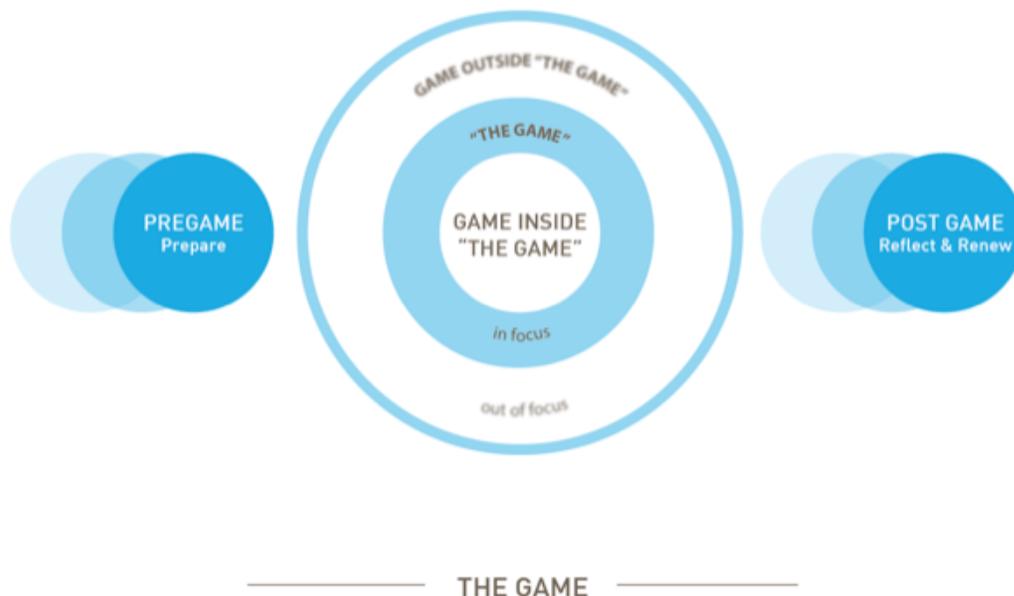
Now, along with strategic thinking comes the execution. It's more important than ever to bring both EQ+Execution™ to making a first impression over a video call. Here are the essential tips for your business to become a trusted resource for prospects.

## The Framework: Pre-game, Game Time, and Post-game preparation is more critical in a remote working environment.

**EQ+Execution Boost:** Now that we're weeks into CV-19, we are working 12 hours a day or have no boundary between home and work. We are all more intense.

**Key Thought:** Reset your energy every morning (or every "Whenever you need it"). **Key**

**Example:** Begin with "What is my Purpose?" At KLE, we "serve with intense purpose to make a difference in a leader's life." Purpose is an infinite source of energy to get you into action when you are feeling lethargic. With that, let's continue this high energy by using the metaphor of a big game as we dive into prospecting.



# Pre-Game

## BIG PICTURE

### Decide on strategic moves and value proposition

Consider adjusting your product offering, pricing or revenue model. As you ideate, ask yourself, what's going to improve the buyers' confidence in your offering right now?

- Pricing options to consider now include smaller packages, value pricing, or discount pricing
- With your product, you could offer free individual services, add product training or support services.
- Create a financing option or deferred payments

**EQ+Execution Boost:** We've found that many people are overwhelmed and may not know what they want. A key way to ensure you are addressing these constraints is to provide prospects with options that are well-defined and flexible.

### Use technology tools to enable creating human, personal and smart connections

Review all tools from CRM, video and email add-ons to make virtual prospecting a personal experience, even without an in-person meeting.

- Video: Now that this is your key meeting format, pick one solution for your organization. FaceTime, Skype or Google Hangouts have free options that could work, while conferencing solutions like upgraded Zoom, BlueJeans, Google Meet, and Microsoft Teams are for enterprises. Slack has a built-in video call feature. Ensuring the team knows how to seamlessly use these tools is key, and there are many online training sessions available.
- Make sure you take advantage of advanced but user-friendly features and tools. For example, with video conferences there are often virtual backgrounds, recording or even a "touch up my appearance" on Zoom that are helpful. Also look into adding collaboration apps that will be additive to meetings, like Miro, a whiteboard app.
- Automate Internal Process: Invest in a task management platform or a CRM (or revise your

## EXECUTION CHECKLIST

### Across a sales team

- Create new product packages
- Adjust pricing strategy
- Set-Up Video conferencing tool with staff training
- Optimize CRM system and ensure processes to keep data are well-organized and up-to-date

### Set-up for video calls

- Use a headset
- Second screen
- Position yourself facing light, ideally natural light
- Dress to impress (party on top!)

### Email prospect before video meeting

- Distribute materials before-hand that will provide some familiarity
- Make it clear that you'll be using video, and politely nudge them to do the same (Looking forward to seeing you on screen!)
- If they will need to download anything to use the video conference tool, let them know ahead of time
- Offer login instructions and any helpful tips about accessing the platform
- Back to back meetings: Have new meeting access codes per call so new meetings don't interrupt your call.

existing tech stack) so that information readily flows across your sales process, even with remote staff.

Tools should be updated to ensure reminders, reporting and data are keeping the pipeline active.

- With all these platforms, start by using the tools internally and work out the kinks. Watch online tutorials to troubleshoot and find key features.

### **Set yourself up for the best first impression on camera**

There's a lot that is visible or becomes apparent over video that's not like the phone or in-person, like nonverbal cues that make someone feel safer or better.

- Sound: If you are speaking into a computer, it can sound like a speaker phone. A headset helps the conversation feel personal and private.
- Light: Lighting can bring out your best on camera. Set up the most flattering light. Position your camera so you are facing the light. The best lighting is natural light so facing a window is great, but not with the sun directly in your eyes. If you don't have natural light, you can use a lamp. It's better to put a light accent light from below. There are inexpensive light rods that can be placed invisibly on a laptop to get a fresh look.
- Monitors: A second screen helps to see people and presentation or work at the same time.
- Wardrobe: Professional is great, especially on the top! Jewel tones work well - sapphire blue, ruby red pops well on camera. Floral and stripes can be distracting and silk can be too shiny.

### **Adjust sales materials for the video interaction**

- A 1:1 video can sometimes be more intimidating for the prospect than meeting in person. Do you have a video that you could send them so they are more educated on your product before the virtual meeting? Even your professional LinkedIn profile, twitter account or bio on your company website can do the trick.
- Visuals: Make sure that if you are creating slides or other visuals to present during the call, they are not taking attention away from you speaking. Slides which are dense with text or graphs on video can more easily distract from what you're saying. Unlike if you were in-person, you will no longer be visible when you are presenting slides on the video call.
- For screen share, have documents open since you don't want to be searching and potentially sharing confidential items on your screen. Avoid time delays of toggling between windows.

### **Preparing any presentations or materials**

- Reduce the content in slides
- Ensure there's ample face-time, without slides taking up the screen
- Have any documents or demos for the call ready and open
- Print support materials

# DURING THE GAME

## BIG PICTURE

### Decide on Listening

Being a trusted partner is an even more important outcome during this time. This is one of those seasons where looking at the bigger picture and how you can help serve will be particularly impactful. Some companies are operating as they did a few months ago while others have experienced drastic shifts.

- Express empathy over what's happening before going into anything else
- Since individual situations and unknowns vary, you can ask several open-ended questions to allow the prospect to share. How much has the organization been impacted? How have you been impacted? What's different in your world right now?

### Eyes and Body Language

- If sitting, make sure you have a good distance between you and the computer. A trick often used by TV personalities is to sit at the front of your chair, which helps you have good posture and helps your voice project.
- Elevate your camera to give a straight-on perspective of you. Looking up into your face is not the most flattering look. An eye-level computer will also help your posture.
- Check on your posture so that you don't diminish your presence. It's good to frame your upper body and face in the picture. Test your camera to see how you look before you meet others.
- There are plenty of shared experiences related to working from home. People are quite patient and forgiving during this time. Even so, you may have little time and attention from your prospect. Think about what you can do to ensure you are confident and can remain focused, even though you might be at home with your puppy scratching at your door.

## EXECUTION CHECKLIST

- Be aware of the energy level of your audience
- Check online for any news on how the company has responded to CV-19
- Prepare questions that allow you to listen and engage your audience
- Reset your energy
  
- Position your body
- Position the computer or camera
- Look into the camera
  
- Have your camera on from the start
- Break the ice - talk about working remotely, a book that can be seen on your bookshelf or what you have been streaming lately
- Mute yourself when you're not speaking to avoid possible interruptions, like if you're typing (or your neighbor screams!)
- Turn your phone and computer notification sounds to silent
- If you are not the meeting host: be on mute and turn off video in case the meeting is being recorded before everyone is online
  
- RESET your energy at the beginning of each call. DO IT!

### **Set the mood for a welcoming and lively conversation**

You're on a lot of calls and dealing with your own fatigue or stress. To set the tone for the call, it has to start with you. It's important to reset your energy and be as fresh as if it was 8am on a normal day. Remind yourself of your purpose before starting the call. Stand up. Jumping jacks. GO!

### **An effective leader is aware of everyone, even if they are not in the same room**

Saying people's names establishes presence. Take charge - announce which people should speak. Leave time for questions. Virtual meetings can be tightly scheduled and seem formal right away - set the friendly tone.

- Watch for what's happening with people's body language, tone, and energy. You can sense when someone might be lost or slowing down, so manage virtual engagement by asking questions or pausing.
- When it comes to audio-only, you have to pay attention to things like breathing or pauses. You can mirror "pace and tone" like you might mirror body language.

## **POST\_GAME**

### **BIG PICTURE**

#### **Give new customers a way to stay connected through digital channels**

Be prepared for more people to view your website than in previous months. You'll want to be the most trusted resource for answers on your business on the internet. Consider publishing fresh answers to new key product questions.

Direct consumers to your blog or social media. Your customers are already on social media, but these days, they are likely checking in much more often to get the latest updates on CV-19. Whether you're posting about the virus specifically or offering product updates, it can be helpful to increase your posting frequency.

#### **Customers will value dynamic and real-time relevant communication, virtually**

A successful follow up builds upon the momentum generated during the meeting. Remote channels can be as effective as in-person. The key is to not only stay on top of what's happening at the prospect company, but also about the industry or even better, on the personal or professional needs you were able to uncover during the call.

### **EXECUTION CHECKLIST**

- If you agree on a future call, schedule since you are both in front of your computer and calendars!
- Update your website or resources based on customer questions
- Update social media channels and post frequently
- Set up a News or Google Alert to be notified about updates your prospect cares about
- Input call data, learnings and outcomes in a CRM
- Use simple tracking tools for analytics
- Stay in touch with others in sales to keep up continuous learning and iteration

Setting up an alert through your favorite news source is a simple way to remind yourself to make contact as soon as relevant events or new updates happen.

### **Track insights more closely**

As a remote team making more calls from home, evaluation is an even more important part of the routine, so you can iterate and improve. Commit to track and measure every customer interaction you have. You can automate some sales tracking using desktop and phone apps that sync call activity with your CRM system.

Keeping your CRM not only up to date, but feeding it more data across your sales team will elevate trends and learnings more easily. You can also use other tools linked to your CRM, like those that track document open rates to know the effectiveness of each marketing piece you send.

### **Get feedback and share knowledge**

Communicate frequently with the team and participate in internal training. For managers and sales directors, giving feedback on calls can be challenging if their sales reps are spread out. Using software, you can record calls or arrange training sessions with mock calls regularly.

When teams work remotely, a communication cadence that includes more detailed reporting will help your team understand how the company is responding and shifting in this time of CV-19. Pulling the team together around common trends, goals and best practices even when team members might be physically apart will create a sense of cohesion. Consider a short-term CV-19 goal or rallying cry!

## **Conclusion**

Being successful in remote sales is a skill that requires practice. Most of your existing sales skills will transfer. You have the opportunity to leap past your competition with the tips above - ONLY IF YOU DO THEM.

**Key Thought:** During the time of CV-19, it can be easy to fall into a pattern that enforces distance and individually driving through tasks and calls. Salespeople, and each one of us for that matter, rely heavily on relationships and social contact. Within a sales organization, this is not only built with customers, but through collaboration among teammates. There are many remote team building activities that can build bridges during CV-19, and new online tools popping up to engage different types of groups. **Key Example:** *We have a team leader create a biweekly question that he led. The first week was to have everyone share 21 life goals in 21 minutes. This was not only engaging but people felt less isolated over the following weeks.*

Remember that remote sales doesn't mean creating a one-man show.

If we, at KLE, can help your Sales Executives sharpen their mindset or connect your Strategy to their Sales process, please reach out to us at [info@kotharileadership.com](mailto:info@kotharileadership.com).