Zendesk Sell Best Practices

How you can make the most of your sales CRM

zendesk

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The difference Zendesk Sell can make

You've done it. You've made the choice to level up your sales process by investing in a powerful sales CRM. Modern sales is a complex, high-stakes game, and you've taken a big step toward becoming more competitive in your space.

But choosing the right tool is just the beginning. For your investment to pay off, you want to take full advantage of the features you've now gained. And that won't happen by accident. It requires intention and strategy.

That's where your CRM comes in. Your CRM enables you to improve the overall customer experience by helping you better manage the entire customer journey, from sales to service, which can have a positive impact on every aspect of your businesses. That includes better visibility into your pipeline and performance, deeper reporting insights, centralized customer data, and so much more. Zendesk Sell is a modern sales CRM built to boost rep productivity, deliver a better customer experience, and give you the pipeline and performance visibility your team needs to exceed revenue goals.

Start right with your CRM

So much of getting the most out of a new product depends on starting out on the right foot. Many organizations make [preventable mistakes when implementing a new CRM](). And while you can always course correct—it's never too late to improve how you do things—it works out better for everyone if you set things up right to start.

Get users involved early. You know Sell will make things easier for your salespeople. But people get used to doing things a certain way, and getting them to change is hard. If your salespeople don't get into the habit of using Sell, you won't benefit from your investment. First things first, convince your team of the specific ways the product will benefit them. Emphasize how it will save them time, cut down on their workload, and improve their win rates.

To sweeten the deal, consider offering incentives or rewards to early adopters. You can add some fun by making gamification part

of the implementation process. Even small rewards, like getting a $10 gift card for completing the CRM training, can make a big difference in spurring your team to get it done.

Have (and stick with) a plan. Knowing what your new CRM is (theoretically) capable of isn't enough to start reaping the benefits of those functionalities. First, you need to effectively manage the implementation process. Work with your sales team, IT department, and Zendesk support staff to decide which product features you want your CRM to include.

Put together a plan that combines getting the CRM working just how you need it to—including all necessary connections to your other products—and training users on how to get the most out of it. For the technical side of your plan, be cautious of scope creep. If you get caught up adding a lot of nice-to-have features (that your sales team may or not even use), the project could drag on. Stick with the functionalities that relate most closely to your goals to start—you can always add other functionalities later, once the tool is in regular use.

Also be sure to provide plenty of training and support. You want users to have enough training to fully understand how to make the most of the CRM. Any time they have a question the training didn't cover, they ought to know exactly who to contact to get a quick answer with minimal effort.

A good plan will balance the human and technical needs of successful implementation. And it doesn't have to require a huge, multi-month project. Seventy percent of Sell customers manage to deploy the CRM in less than eight weeks.

Get your data right. A CRM's value depends on the quality of the data it contains. If your sales team pulls up the CRM only to find it full of outdated information, that will hurt its efforts to close deals. Moving the customer data you already have into Sell is easy—don't worry about that part. Making sure the data is clean and accurate *before* you add it could be a lot harder; it really depends on how you managed data in your previous system.

If you're lucky, your salespeople will already be following a clear process for keeping customer data up-to-date in a consistent format. If not, you may have to make a project out of updating the records you have so you're starting from a solid position in Sell.

If this part does turn out to be a big, frustrating project, use it as an opportunity to create a clear process moving forward that keeps your customer data clean, accurate, and up-to-date.

Clarify your sales process

If your sales team already uses a clearly defined sales process, a new CRM is a good reason to revisit and update it. If you've been working without a defined sales process so far, take this opportunity to create one.

Clarifying your sales process helps you keep everyone involved on the same page. Your salespeople will always know the best next step to take, reducing confusion and improving efficiency. That will minimize valuable prospects falling through the cracks either because no one knows who should reach out or because two sales reps went after the same lead.

To define your sales process, start by talking with your salespeople to gain a clear understanding of what their current process looks like. Combine the information they share with data you have about what's working well now. Then sit down to work out the specific steps that should be part of each stage of the process.

While the details will vary for each organization, the main stages typically included in a sales process are:

- **Prospecting.** All activities related to identifying potential customers, getting on their radar, and sparking their initial interest in your product or services

- **Qualifying.** The phase of determining the relative value of different leads, in order to prioritize which ones to devote resources to

- **Presenting.** The stage where you convince leads of your value through activities pitches, demos, and sales calls

- **Quoting.** When you start to talk about money—what your product will cost them and what the specific terms of use are

- **Closing.** The final negotiations that close the deal and make the sale

- **Post-sale.** For new sales, transition the customer over to customer service and get them set up for implementation; for losses, perform an analysis to understand why and look for ways to improve

A smart sales process will make all the difference in how much value you'll get out of your new CRM.

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10 Sell best practices

When you invest in a product that offers a lot of valuable features, you face the risk of users overlooking some of the best ones. But Zendesk Sell offers all the features it does for a reason. Each one can contribute to making the sales process easier, more efficient, and more effective—if your team manages to put them to use.

Here are some tips and tricks to help you get started.

1. Connect all of your communication channels

Modern sales must be omnichannel, because that's what modern customers expect. That presents challenges for salespeople because it means maintaining context across interactions happening on various channels—email, chat, phone, etc. Any drop in communication could mean a poor experience that risks your customer churning. In fact, our latest CX trends report showed that more than 60 percent of customers would defect to a competitor after one bad experience.

Sell is designed to connect the information from all the different channels your prospects use in one central product. Every touch point a prospect makes with your company can be easily added as a data point in their record. In most cases, that happens automatically—your team won't have to do extra work to record the information.
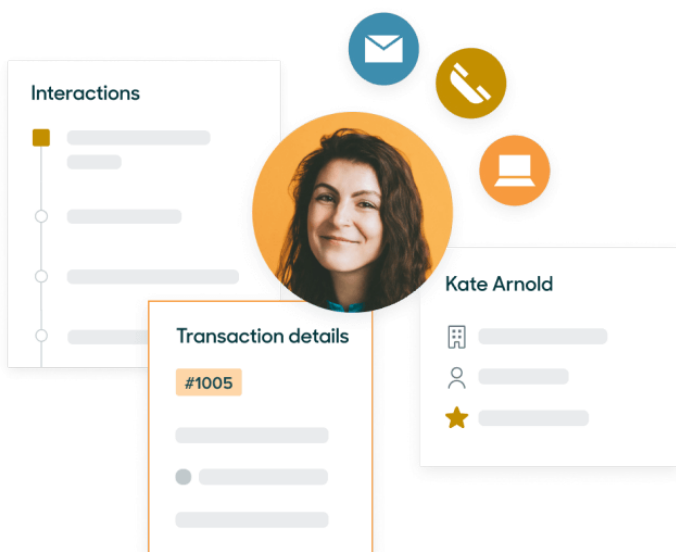
For example, you can set up Sell to [automatically sync with your email](). That enables Sell to keep a record of all email contact your team has had with a prospect while also logging when a prospect opens, clicks, and replies to emails in real-time.

Meanwhile, [Sell Voice]() lets you link each sales-person's phone to the platform. You can then make and answer calls and text messages from within Sell itself, and also log the call, record it, add another person, or pull up a script while talking. And you can set up your calendar to sync with Sell so that it automatically updates when a call is scheduled.

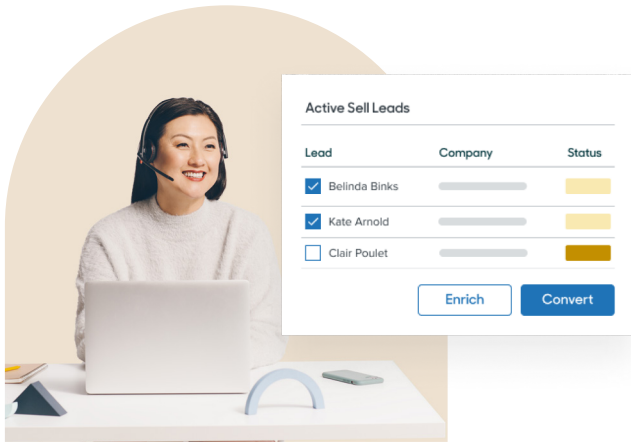## 2. Centralize account information in one place

Leads, deals, and contacts. Providing a seamless experience to customers and prospects is one thing, but your reps matter just as much. Sell makes it easy to create a single source of truth for all of your critical account information.

To keep that promise, your CRM must be up-to-date every time a sales representative pulls it up. Sell uses the classification of [leads, contacts, and deals]() to help your team quickly identify where in the sales pipeline a prospect is. Your team will score leads differently based on interest. Once the sales team has enough information to qualify a lead, you can switch them into the contact category. Then when your team is actively working to move them through your sales pipeline, you can transition them into the deal category.

Pipeline conversions. Understanding leads, deals, and contacts in your sales funnel helps signal important information to everyone else in the organization. They help the team prioritize which deals to focus on and ensure you don't waste resources using tactics that belong in the wrong stage of the sales funnel. Tracking data on the movement of leads to contacts and deals also helps you understand your pipeline conversion rates, which is valuable knowledge every sales leader must keep track of to hit their revenue targets. If you see deals are getting stuck in a certain stage, you can use that information to pivot your strategy. All of this data can also be pulled into the reporting tool for deeper insights.

Capturing custom data. In addition to the three main categories, Sell gives you the power to create [custom fields](). Every company has a unique sales process, which means the information you collect won't be constrained by what Sell includes by default. Work with your sales team to think through what fields are most important to add, and then customize Sell to work better for you.

For example, you can create smart lists based on your top lead scores to create a targeted "hot" leads list, or for a specific industry to spin up targeted outreach sequences.

4. Streamline mass communication while still being personal

[Seventy-six percent of consumers](#) now expect personalized experiences. But doing personalization well is key, and that requires the right mix of good data and powerful features. Sell gives you the tools to rise to the challenge.

Send bulk emails with smart lists. As mentioned previously, smart lists are a quick and easy way to pull lists of your most frequented views of data. That enables you to send targeted messages to a select group of leads, making it easier to tailor the message based on what you know about them. With Sell, you can [send bulk emails](#) to your saved smart lists for leads and contacts without them knowing it's a bulk email. That way you can get personal while still scaling your outreach.

Automate the basics. Personalization gets harder to do at scale, so Sell offers features that cut down on workload without impacting quality. [Saving emails as templates](#) makes it easy to reuse the same wording later, so you don't have to go digging in your outbox to find a message to copy-and-paste or write each email from scratch (both of which can be a

3. Identify and focus on the highest quality leads

Sell offers tools to aid in both identifying leads that aren't on your radar yet and scoring the leads you have to prioritize your outreach. For the first, [Sell's sales engagement tools](#) come equipped with data on millions of businesses and contacts, which will give you a headstart in finding leads that are a good fit. That same data can be applied to leads already in your system to further enrich the information you have about them.

For leads already in your pipeline, Sell offers [lead scoring](#) that turns a complicated game of "what if" into a more straightforward equation. You can analyze which variables typically correlate with conversion rates and customer lifetime value, and give each factor a score according to its importance. That way your sales reps know which leads to prioritize.

Sell also enables the creation of [smart lists](#). Smart lists are a great way to create saved views of the data you look at most often.

serious time drain). Sell also offers merge tags to let you further customize the emails you send, without having to manually change out information in each one. You can use merge tags for standard fields (such as names) as well as custom fields like industry or specific actions.

Set up sequences. Sometimes you have leads or contacts who aren't moving quite as fast, but you want to still keep them engaged. This is where automated email sequences come in handy. Sequence emails are created using email templates and cadences that you've set in Sell. You can even monitor the performance of your sequences to optimize. This is a low-effort way to keep interested leads engaged with your business past the initial message.

5. Have an automation strategy

An efficient sales process and strategy for prioritizing leads can do a lot to reduce the amount of work your salespeople do. But another great way to reduce their workload is to remove low-level, tedious tasks from their purview entirely.

Sell includes tools that let sales teams automate a number of tasks. Some of those we've addressed already, such as lead

scoring, which does the math of weighing the relative value of different leads for you. Email sequences automate the process of contacting leads to keep them thinking about your brand.

In addition, your team can set up sales triggers to bring automation into more parts of the sales workflow. Sales triggers are created using If/Then conditional statements. For example, you can automate the workflow of all sales reps so that every time a trigger event (such as a deal being updated) occurs in Sell and meets a predefined condition (such as, "Deal value is greater than $50,000"), Sell will automatically attempt to carry out the actions defined for that trigger, like reassigning to your top rep.

6. Organize your day and stay focused

Even with all those little annoying tasks moved off of their plate, your salespeople can still get sidetracked by distractions. Sell also provides features to help salespeople organize their to-do lists and maintain their focus each day.

When you start off each day with a clear list of tasks to complete, getting started is that much easier. The task player in Sell serves up the next task on your list, along with all the contextual details you need to complete it. That makes moving from each project to the next much easier and more efficient—there's a lot less opportunity to get distracted along the way. As you work through your list, you'll see a progress bar that helps you track how far along you are in the day's work.

And any time that task list involves a lot of phone calls, you can use Sell's automatic dialing feature, which also automatically logs calls. The time it saves per call may seem minimal, but for salespeople tasked with a long list of calls, the difference adds up.

Sell provides features to help salespeople organize their to-do lists and maintain their focus each day.

Tasks — Play tasks

Today ●

☑ Discovery questions
☐ Call to check status
☑ Review client changes
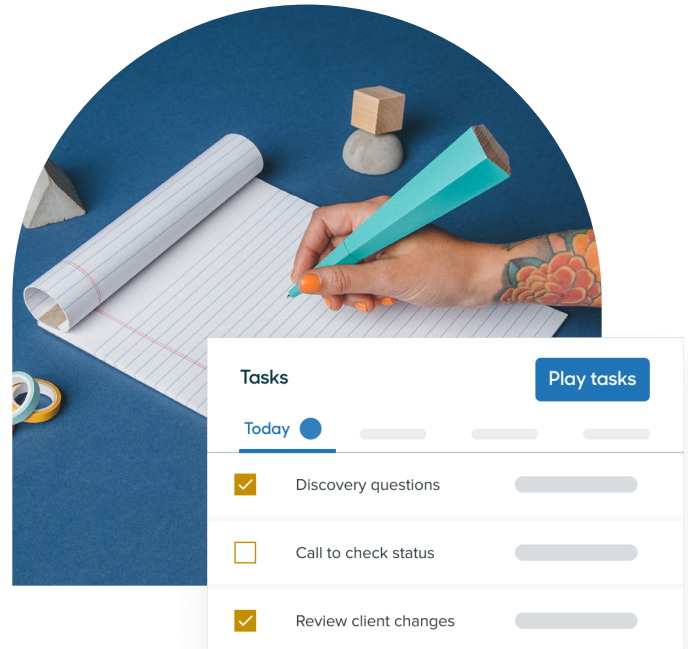
7. Reinforce consistency in your sales process

Having a clearly defined process doesn't mean your sales team will consistently follow it. People fall into their own habits and can start to skip steps in the prescribed workflow. Customizing your sales pipeline to match the stages in your sales process ensures less rogue behavior and higher adoption.

And for data collection that's non-negotiable, you can set up required fields. For example, creating a new lead, contact, or deal typically requires some basic information like company name, contact name, and email address. Or maybe you want to capture key info when a deal moves from one stage to another. Sell makes sure your reps capture this data by making it mandatory.

8. Stay productive on the go

Some sales reps are always out in the field. Wherever they are, they'll be more effective if they can access their sales data on the go.

Sell's [mobile CRM](#) provides your sales reps all the information and features they get with the desktop version. That increases their effectiveness, since they won't miss out on key functionality every time they leave the office. Sell's mobile app automatically tracks all activities data, like emails, visits, or phone calls, meaning you won't lose valuable data on interactions that happen on the road.

9. Promote cross-collaboration

The sales team doesn't work in a vacuum—or at least, it shouldn't. Exchanging data with other teams across your business gives sales a better understanding of the entire customer journey.

Marketing. Sell can be linked with a number of third-party marketing automation apps, including [Act-On](#) and [DotDigital](#), which help bring consumer behavior insights into your sales tactics. For example, you can run email campaigns using your sales data to capture and convert more qualified leads.

Support. With Zendesk, your sales and support teams can work together to deliver superior customer experiences and exceed company goals. Our integration with Support allows you to share key data and insights to better understand customers, identify cross-sell and upsell opportunities to drive revenue, and boost customer loyalty and retention. Not to mention all of this is done on one platform, streamlining operations and lowering your total cost of ownership.

These integrations don't remove your team's agency over who has access to what information. You [control permissions](#). If some data needs to be limited, or if some of it is simply irrelevant to the other teams, you can set up permissions to account for that. But having a product that simplifies sharing information between departments is a powerful way to overcome internal silos.

10. Set yourself up to make data-driven decisions

By now, you know Sell makes data collection easy. But it also organizes and analyzes that data in a way that helps you get better use out of it, arming your sales team with the insights it needs to make data-driven decisions. Below are three tips to getting started with Sell reporting and analytics.

- **Create dashboards with advanced analytics.** With Sell advanced sales analytics capabilities, your sales team can create dashboards to address key sales KPIs. That being said, your dashboard shouldn't be overly complicated. Instead, it should be central to a specific business aspect and focused on what your audience cares about. So ask yourself that question—who are you building the dashboard for and what key insights would they want to know? For example, a pipeline generation dashboard helps you know if and when your pipeline is in trouble. And when building a dashboard consider adding text boxes, images, and filters so others can self-serve the information they need.

- **Keep an eye on rep performance.** Tracking the performance of your individual reps isn't just about making sure they hit quota. It's also a great way to see which reps can use more coaching. Metrics like call volume, appointments set, and win rates help you identify any team members who need more training or support and those who deserve to be commended for exceeding targets.

- **Use data to optimize the sales process.** Sell packages all of your metrics into CRM reports that empower your team to better understand and analyze the data you have. Insights like win/loss analysis, deal loss reasons, sales cycle length, and lead age help you better understand the bottlenecks and opportunities in your sales process.

Additionally, Sell's sales forecasting reports help you better predict future sales and budget expectations.
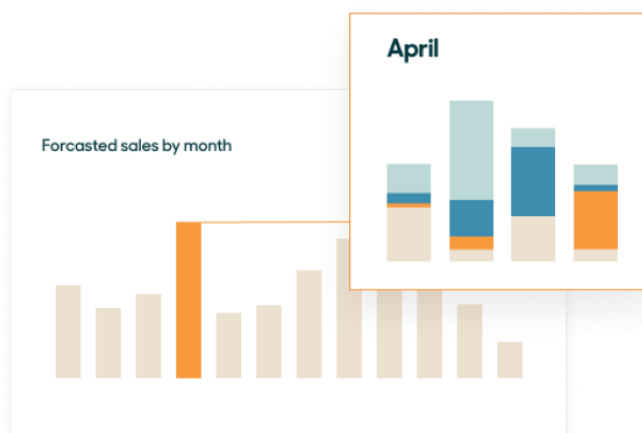
Sell glossary

For those new to Sell, the way we use some terms here may not match the usual definitions you encounter. To understand what we mean when we talk about Sell's main features, see this glossary of product-related terms.

Contact

A contact is one of the three main classifications you can use in Sell (along with lead and deal). Once a salesperson qualifies a lead (usually by confirming they're a good fit or have a past relationship with the company), they update them to contact status. A contact can either be a person or a company, and you can link the contact record for a person to the associated company record.

Customer

A customer is someone who has made the decision to buy (success!). Once a deal is won, you switch a contact to customer status.

Deal

A deal is an opportunity or potential sale and is the entity that you track through your sales pipeline. A deal can have one or more contacts.

Lead

A lead is a person or company that may have the potential to become a contact, but has not yet been qualified. That means they likely have not worked with your organization, and no one has confirmed yet whether they appear to be a good fit. Once someone has qualified the lead, you can convert them to a contact.

Sequences

Sequences are a series of automated tasks that streamline a workflow for engaging leads and contacts. One example would be creating a timeline for follow-up phone calls, sending emails, and making connections.

Triggers

Sales triggers automate specific parts of the workflow of a sales rep. When a trigger event occurs (such as a deal being updated to a certain value), this prompts the evaluation of the trigger conditions and, if the trigger conditions are met, it carries out the action that was predefined by an admin. You can see some examples in Popular recipes for Sell sales triggers.

We also have a much more comprehensive list of sales industry terms. If you regularly find yourself having to double check the meanings of common industry acronyms and jargon—this is a good link to bookmark.

Zendesk is here to help

Investing in a new sales CRM is a big deal, and it requires your sales team to undergo some notable changes. That being said, you should never feel lost when working within Sell. We offer many resources to help you take full advantage of the product.

We have several resources to help users learn all the ins and outs of using Sell. Check out our Zendesk Help Center for in-depth details written by our product experts on Sell features, including a getting started guide. We also offer free training videos available for users and admins.

Want to give feedback or share your knowledge on Sell? Join our Community where you can ask questions, follow topics, and interact with other power users.

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