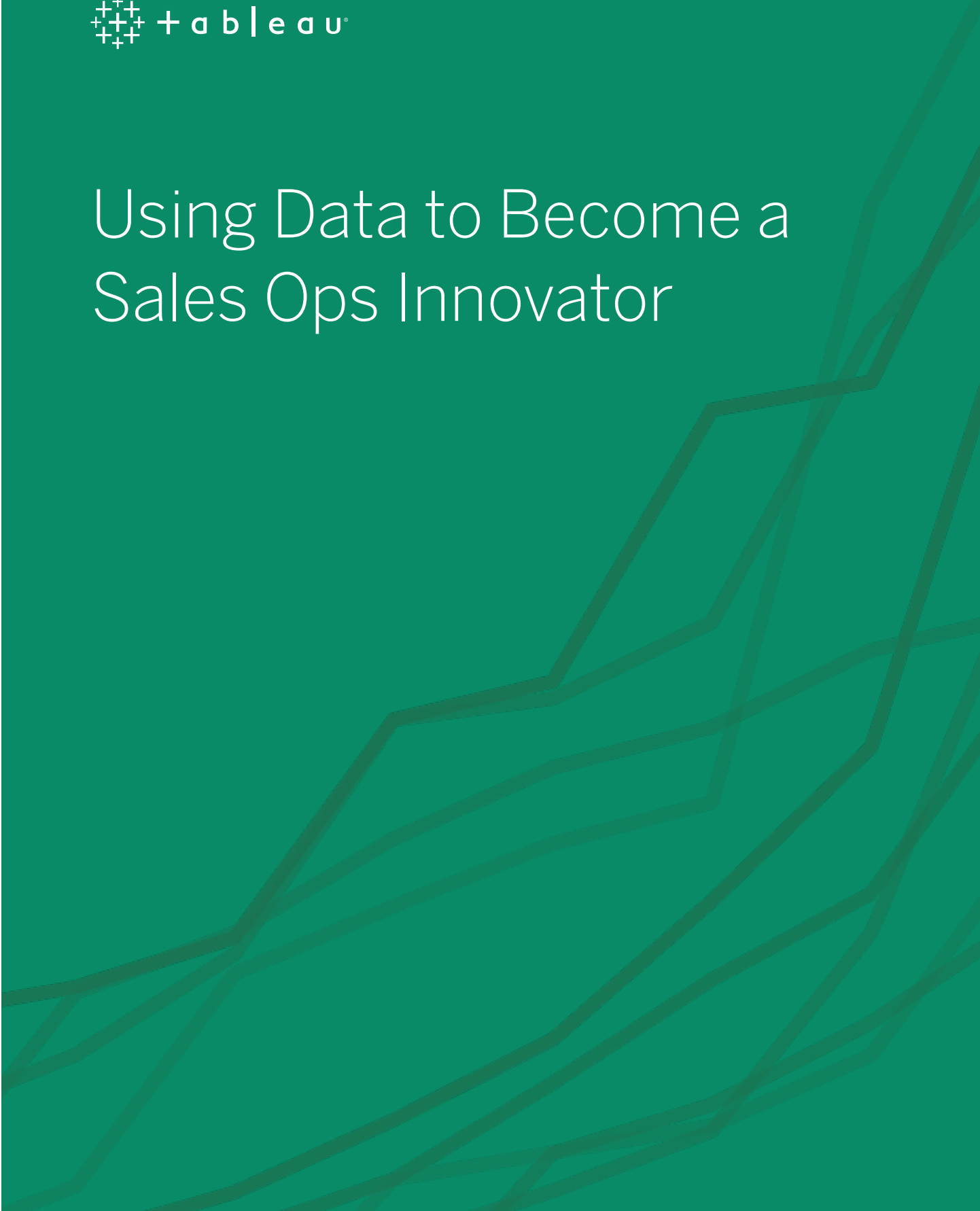# Using Data to Become a Sales Ops Innovator

Are you a sales operations innovator? Do you have the actionable insights you need to make decisions in near and real time? Are you a champion of advanced analytics, leading your team to greater success using data-driven insights? Today's sales operations teams are making essential contributions at the strategy level—because more and more, it's understood that being competitive means putting data analytics at the center of the organization.

And there's lots of data out there—in fact 2.5 quintillion bytes of data are created daily, according to IBM. While sales has typically been slower to embrace and apply data, stars are aligning for a sales data revolution. Other business units are also beginning to invest in analytics as they see the importance of data in their day-to-day operations.

There's a clear opportunity and a business imperative for sales operations to leverage advanced data analytics in order to thrive as a modern sales organization. These three practices will make a critical difference and support a new perspective for sales.

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Practice 1:
Choose the right analytics technology for the new age of sales

Buyer behavior is significantly evolving, and sales operations needs to stay ahead of the trends. Maybe your team is implementing platforms such as Square, Venmo, Workfront and Eloqua or considering emerging technologies like blockchain. At the same time, it's important to maintain some of the popular legacy systems for customers who are slow to adopt innovations like voice-activated transactions.

Besides external pressures from customers, there are internal shifts underway as selling becomes a "team sport." Many products are not sold by lone wolves but by groups that encompass sales engineers, sales consultants, analysts, and industry or product experts who collaborate and identify the right product(s) to meet customer needs.

Sales in the modern era is a dynamic environment that requires flexibility and change on the part of your entire sales team, but especially sales operations. With all these changes and pressures considered, it's critical for sales ops to recognize how their team adapts to customer needs and to evaluate priority technology investments as the technology stack grows.

As you incorporate different sales technologies, each product or solution adds complexity to your company's data and IT systems. But, after considerable time and investment you still can't work with all of your data holistically, it's time to ask, "how are these technologies helping?"

To really understand the data (and the details) from all the different systems used by sales and turn it into actionable insight, you need an integrated, flexible analytics platform. Choose a solution that will enhance communication, transparency and understanding, and provide a comprehensive view of all sales activity. A scalable, enterprise-ready data analytics platform changes what's possible. With the right information and a clear view into what adjustments are necessary, sales teams can improve forecast accuracy, set better quotas, and manage the pipeline more effectively.

Practice 2:
Make the shift from reactionary to intentional data analytics

When you look at adoption metrics, it's clear that there is significant opportunity for most sales teams to grow their data and analytics initiatives. The change won't happen overnight; a culture shift needs to happen across all levels of the enterprise. When organizations implement a data analytics solution, the results are significant: McKinsey & Company found companies who build world-class sales ops functions

empowered by data analytics and technology can realize one-time improvements of 20 to 30 percent in sales productivity with sustained annual increases as high as 10 percent.

Here are a few recommendations to begin reframing sales team culture and realize the benefits of data analytics in your organization.

- **Rethink talent profiles:** Recruit and develop talent, particularly data scientists, who can structure the right questions to ask of your sales data, perform the analytics and interpret what the data means.

- **Re-imagine sales processes:** Consider the rhythm of the business, keeping in mind weekly, monthly, quarterly and annual processes regardless of the business group or country you're in. Embed sales analytics into different processes, including account and territory planning and opportunity management workflow.

- **Simplify IT roadmaps:** Connect the dots with an optimized IT infrastructure to assess where your data comes from and determine a master source of record for sales data. This can't be done without governance to maintain your data's integrity. This "Implementing a Governance Framework" webinar explains some benefits when the business and IT create balance between agility and data control and considerations for developing a data governance process.

- **Invest ahead in defining your data model:** Adopt a data model that brings a 360-degree view of your customer and allows for micro-segmentation. As you assess business intelligence technologies, make sure to select a data analytics platform that serves up a comprehensive data view.

- **Aspire to "just-in-time" insight delivery to sellers:** Deliver that comprehensive data view and corresponding insights to sellers at a time that matters most to them.

 In addition:

- **Stay close to your field of sellers** by dedicating time to understand their performance, what they're hearing and what's working or what's not.

- **Layer data analytics onto your CRM system** with the help of technology to enable greater predictability and planning.

- **Deploy data capabilities with a greater focus on sales planning** versus project management. This means expanding the range beyond basic customer data and using advanced analytics to identify predictive features so the right resources align with the right opportunities for customers that are primed to buy.

Practice 3:
Apply advanced analytics to reach peak performance and success

With the right analytics platform that brings all of your data together, you can become a sales operations innovator, a key advisor to your sales teams—and more importantly, a strategic contributor to your organization.

So, where's the best place to apply advanced analytics to make the biggest impact for your team? When you're tasked with supporting strategy and planning, sales enablement, project management and performance management, analytics plays a valuable role. The first step is to discuss priority use cases with your sales leadership and reach a consensus on where to focus your efforts.

For some, there may be preference to use advanced analytics to segment deal flow based on account or customer characteristics. Or maybe the team wants to reevaluate and modify hiring or adjust performance evaluations and rewards using data-driven criteria. Mitigating risk is also top of mind for most sales teams, especially sales leaders and account reps. Using advanced analytics to understand the variables affecting account churn or supply and demand are areas where all organizations can make effective changes.

Real-world success: brands achieving sales ops nirvana

Cisco

Cisco's sales team was challenged by inconsistent reporting stemming from disparate data sources and stale spreadsheet reports. Using the power of advanced analysis and visualization to collect dynamic and actionable sales insights from their data warehouse, sales operations moved away from hundreds of siloed reporting solutions to one flexible, agile and secure enterprise solution. This supports the team in conducting more effective ad hoc reporting, quarterly business and funnel reviews that directly drive improvements across sales.

International Game Technology PLC (IGT)

The sales team at IGT was stuck with old product data, which prevented them from being able to replace underperforming machines. They integrated analytics into their CRM solution (Salesforce) to provide their teams with a way to monitor game performance, check order status, and perform pipeline analysis while in the field. That enabled sales to act in the interest of their customers and their business, when the time was right.

Stryker Endoscopy

Stryker Endoscopy found it difficult to access, aggregate, and format their ERP system data to transform it into actionable insights. They leveraged self-service data discovery to power enterprise sales and their operational performance process. They're no longer in a constant state of firefighting, which became a barrier to strategic and operational planning between sales and marketing (but also resulted in millions of lost revenue opportunities). The company now has long-term visibility of supply, demand, and backorder risk.

Sales ops is the secret weapon to performance enhancement

With powerful, data-driven insights in hand, you'll be in a better position to serve as the connection point to partners across the business, like finance, human resources, IT, and marketing. Strong collaboration with these groups fosters better sales planning, more effective hiring, capabilities development, lead management and new market development, to name a few.

Instead of scrambling to keep up with requests from the team and leadership to understand performance, you'll have data-driven insights and recommendations in hand. Even better, these insights and recommendations will reflect the real-time rhythm of the business and offer a forward-looking perspective.

Plus, there's cost-effectiveness gains that come from using predictive and artificial intelligence technologies for data analysis. In resourcing, a perpetual pain point, adding headcount isn't sustainable. By applying predictive technologies to determine where to deploy resources for the greatest impact, less manpower is necessary, there's greater standardization, and costs are lowered even as you scale.

If you're ready to explore your sales data faster and deeper than ever before, visit our Tableau Sales Analytics Solutions page, a one-stop resource for all things data and sales that will lead you and your team to new and better possibilities.

About Tableau

Tableau helps people transform data into actionable insights. Explore with limitless visual analytics. Build dashboards and perform ad hoc analyses in just a few clicks. Share your work with anyone and make an impact on your business. From the individual analyst looking at specific sales performance to the sales executives looking at overall performance in the pipeline and ability to hit targets that support company goals, people everywhere use Tableau to see and understand their data.