

Beyond the funnel: reimagining the sales experience with Slack



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Introduction

After nearly a year spent navigating the pandemic, most companies have adapted to some kind of “new normal.” But the dramatic shift in how we do business continues to create ripple effects for sales teams.

Company budgets are tight across industries, with purchases under greater scrutiny. As a result, buyers are less responsive to sales outreach than in the past.

44%

of organizations forecast decreased responsiveness to sales outreach

Source: “[LinkedIn State of Sales Report](#),” LinkedIn, 2020

61%

of buyers say it’s difficult for a company to earn their trust in 2020 vs. 54% in 2019

Source: “[State of the Connected Customer, 4th Edition](#),” Salesforce, 2020

In addition to these trends, core parts of traditional selling—face-to-face meetings, trade shows, networking—are no longer viable and likely won’t be for some time.

Businesses need to adapt. In fact, [McKinsey found that 89% of companies](#) expect to use the new go-to-market models they

developed during lockdown for at least the next 12 months.

“We’re now in this not-normal phase where we’re still at home and we’re going to be here for a while, and that’s just required us to be increasingly flexible, both with the way we engage with our customers and the way we engage with our partners and our employees,” said Mark Wayland, the chief revenue officer of Box, at [Slack Frontiers 2020](#).

But the truth is, Covid-19 isn’t entirely to blame for the evolving strategies for sales teams. The pandemic simply accelerated existing trends.

89% of companies expect to use the new go-to-market models they developed during lockdown for at least the next 12 months.

Source: “[These eight charts show how Covid-19 has changed B2B sales forever](#),” McKinsey, 2020

In fact, [more than 75% of buyers and sellers](#) say they prefer digital self-serve and remote human engagement over face-to-face interactions.



The trends tell the same story: Sales teams shouldn't look for ways to return to their operations before Covid-19. Instead, it's time to pause and reflect on the victories and challenges they experienced this year. It's time to start building a more agile sales framework—one that empowers reps to establish productive internal and external relationships, no matter where they're located.

“We're now in this not-normal phase where we're still at home and we're going to be here for a while, and that's just required us to be increasingly flexible, both with the way we engage with our customers and the way we engage with our partners and our employees.”

Mark Wayland
Chief revenue officer, Box

You need a better, more human way of collaborating digitally—one that maximizes your team's ability to meet both the company's needs and the needs of your buyers.

Enter Slack.



Unlock new ways to connect with buyers

In this time of tight budgets and heightened stress, building trust is more essential to buyers than ever before.

Salesforce found that **86% of business buyers** want sales reps to act as trusted advisors for their purchase journey. And yet nearly **three-quarters of buyers** feel that most sales interactions are only transactional.

Reps earn “trusted advisor” status by solving problems for buyers. **Sixty-six percent of business buyers** expect sales representatives to develop solutions for them. But again the reality doesn’t live up to the expectation—only **37%** of those buyers experience solution-focused sales interactions.

To build deal-closing relationships, sales teams have to start thinking outside the box.

With outside sales severely limited for the foreseeable future, many companies are relying on traditional communication tools—email, the phone, meetings—to try to build relationships. The problem is, traditional communication can’t keep up with the increasing demands for fast, dynamic exchanges:

- Email is the workhorse of telecommunications, allowing reps to reach out to leads and establish contact. However, it’s also a rather slow and formal

medium. It’s too easy for emails to feel like a transaction instead of a conversation.

- Virtual meetings provide a much more personal touch. However, they’re also time-constrained. Reps have to balance selling with building rapport, usually in 30-minute increments. It’s tough to line up schedules, so these meetings also tend to be few and far between, especially early in the deal cycle. This makes it difficult to really create a connection.
- Text is currently considered the “gold standard” in sales communication because it’s fast, convenient and more casual than email. However, texting is difficult to scale. Your reps likely send text messages from a customer relationship management (CRM) system, but your buyer is texting from their phone. This creates a barrier between your point of contact and the rest of their organization—and you’re never selling to just one person.

These communication tools all have their place in the process—but they’re not enough on their own to help you establish yourself as a trusted partner to buyers. If you want to differentiate yourself from competitors, the way you collaborate with buyers is a good place to start.

Strong seller-buyer relationships depend on great collaboration with both internal and



Unlock new ways to connect with buyers

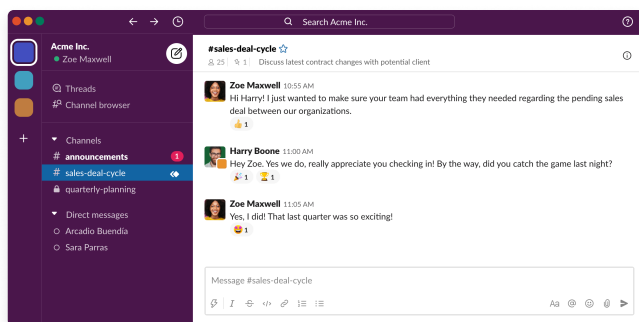
external stakeholders. Becoming a trusted advisor means creating confidence in both your ability to solve a buyer's problems and showing personal interest in their success.

To build that confidence, you need a tool that allows you to connect and collaborate with buyers quickly without sacrificing the human element.

Slack Connect promotes a faster, more personal sales experience

Slack is a secure channel-based messaging platform that enables teams to communicate in real time around a topic or project. Here, all your stakeholders, files and critical app data are brought into a single hub of collaboration.

With Slack, sales reps can communicate in a human way and establish rapport quickly with buyers, speeding up agility and decision-making on both sides.



Slack Connect lets you invite a buyer's organization into a secure, shared Slack channel, where, your sales reps can engage

directly and personally with decision-makers and key team members at the buyer's company. No more emails lost in buyers' inboxes or messy email chains trying to reach the right stakeholder. No more waiting for a meeting to answer an important question or engage with the whole buying team.

With real-time access to prospects, it's no wonder that sales teams using Slack Connect see **deal cycles that are 4x as fast**.

But the benefit of that access goes both ways. Through Slack Connect, buyers have constant access to their sales rep, as well as to the broader expertise of the company. A sales rep can easily add internal experts to their shared channel to answer buyer questions quickly.

This level of access to your company goes a long way in building trust. When you're collaborating in Slack, you and your buyer aren't just two people trying to make a deal happen. The two of you are working together to solve a problem.

For online payment platform **Stripe**, Slack Connect is key to connecting with buyers from pre-sale to signed contract. At the beginning of a sale, Stripe's reps would typically double down on communication using the "law of 2x"—starting with a meeting and following up a week later.

But this strategy no longer makes the cut. A lot could change in a week, and Slack is more in line with the tempo of the digital workplace.



Unlock new ways to connect with buyers

“In Slack channels, the dialogue with the prospect happens in real time, as opposed to the next time you align your schedules,” says Jeanne DeWitt Grosser, Stripe’s head of Americas revenue and growth. “This kind of personal, persistent connection grows customer loyalty and retention.”

Often sales reps have to communicate with a variety of departments to seal the deal. Instead of emailing them separately and creating silos, Stripe’s account executives and solution architects set up a Slack channel with key customer stakeholders, like developers, the head of payments and a finance representative.

In these Slack channels, teams can quickly follow up on term sheet details and any other contract questions. These cross-functional conversations happen efficiently in Slack, which helps avoid miscommunications, reduces the need for long conference calls and relieves the burden of coordination for the buyer.

“You can tell when there’s energy in a relationship—and the deal—and it’s hard to get that over email. It used to be in person and over text and phone. Now it’s Slack Connect.”

James Dyett

Head of global product sales and payments optimization, Stripe

At cloud content management company **Box**, Slack Connect effectively replaces email and extends channel-based messaging to everyone the organization works with, internally and externally.

“What I find is that when you have that Slack channel opened up, it’s like this privileged communication line between us and a customer or a prospect. You get much higher fidelity communication, much more regular communication, because you’re not lost in their overflowing inboxes,” says Wayland. For Box, Slack is the natural place to go for communication with a rapid response rate.

On average, teams using Slack see a **60% decrease** in turnaround time for customer responses. They also hold **50% fewer customer meetings** because both parties can collaborate asynchronously.

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With Slack Connect, the cloud data company **Snowflake** can provide prospects with white-glove support throughout the deal cycle.

After Snowflake account executives (AEs) establish contact with a lead, they set up a shared Slack channel and invite critical team members from both the Snowflake and customer side to join. Snowflake AEs then use this channel as a landing point to answer questions about the Snowflake platform.

“If a lead has a question, we can get them an instant response from an engineer or other Snowflake team member, setting us apart from the competition,” says Cedric Dageville, a corporate account executive at Snowflake. “Customers feel like we’re all working on the same team.”

60%

decrease in turnaround time for customer responses

50%

fewer customer meetings for an account manager

Your reps are already fighting an uphill battle when it comes to building relationships with buyers—trust is low, budgets are tight and inboxes are overwhelming. Slack Connect gives reps the tool they need to build genuine rapport with customers at the speed that is needed to close deals.



Boost buyer experience by giving reps instant access to the whole company

The **majority of business buyers** want connected experiences—a “united front of salespeople, customer service agents, and other individuals armed with the same context and information,” according to **Salesforce**. And yet **over half of customers** say it generally feels like sales, service and marketing don’t share information.

This “united front” isn’t just for the customer’s convenience—it’s critical for everything, from customer churn to rep confidence. Let’s take an all-too-common scenario:

A sales rep at Acme Corp. gets an inbound lead from a new marketing campaign. The campaign pitches Acme’s software as ideal for human resources management when marketing previously focused on sales use cases. The lead comes into the conversation with specific expectations based on this campaign, but marketing hasn’t yet updated the sales team as to the messaging and value propositions of the campaign.

Best-case scenario: The sales rep is tipped off about this before reaching out to the lead and has to chase down the right information and assets. Worst-case scenario: The rep creates confusion for the lead by pitching them the wrong use case.

73%

of business buyers expect connected experiences

Source: “**State of the Connected Customer, 4th Edition**,” Salesforce, 2020

But let’s say they get past this initial hiccup. The rep closes the deal, selling the buyer on Acme’s ability to customize a certain function so that the software is better suited to the buyer’s HR use case.

Then the rep passes the account off to an implementation or service team ... that suddenly finds itself with a customer who expects something they can’t deliver.

Now everyone’s in an awkward position. The customer distrusts the sales rep and the company at large. The sales team is frustrated with the marketing and product teams for not providing them with better information. The support and product teams are frustrated at sales for setting expectations they can’t live up to.

It’s not just the customer who suffers in this scenario. When a sales rep invests time and



energy selling a buyer on something the rest of the company can't deliver, it erodes the rep's morale and confidence, leading to slower deals and less proactivity.

54%

of customers say it generally feels like sales, service and marketing don't share information

Source: "State of the Connected Customer, 4th Edition," Salesforce, 2020

If you want to not only win deals but also create loyal customers, you have to sell as a team. Sales reps need the support of the entire company in order to deliver connected experiences to buyers. But companies are limited in their ability to sell as a team if resources and experts are locked into functional silos with traditional communication.

Email only exacerbates these communication barriers. It's too easy to lose an important request in an inbox or miss important information in a long thread—to say nothing of key stakeholders accidentally being left off email chains entirely.

Some CRMs do have built-in sales collaboration tools where reps can chat about deals without leaving prospects' records. But these tools can also create bottlenecks as many rely on email notifications, which can quickly get lost in the pile (and defeat the purpose of a chat program). These tools are also typically limited to the sales team. Barriers like limited user licenses prevent the broader company from engaging in the

When all departments are aligned around the deal, your company can deliver the connected experience buyers expect.

CRM—which leaves reps with the same cross-functional collaboration issues as email.

Sales reps need a way to bring stakeholder teams into the deal cycle with them. When all departments are aligned around the deal, your company can deliver the connected experience buyers expect.

Slack empowers reps to deliver a fast, consistent sales experience

Slack gives reps frictionless access to resources and stakeholders across the company—and gives other teams visibility into the sales process. No more delaying a deal because you're waiting for an email back from five different stakeholders across legal, finance and product teams. No more miscommunicating features because an engineer never replied with clarification on technical specs.

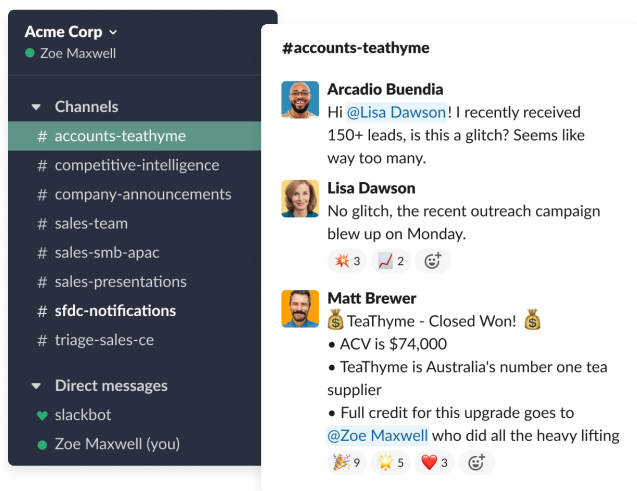
In Slack, anyone from any team can be added to a channel, so no one's ever missing from the conversation. [Research by Troops](#), a revenue communications app designed for Slack, found that the majority of sales organizations that use Slack create dedicated internal channels for every customer and prospect. These dedicated channels ensure that sales reps have instant access to all internal stakeholders involved in



Boost buyer experience by giving reps instant access to the whole company

the deal, and likewise that stakeholders have full visibility into the deal process.

The sales team at Slack creates a channel for every major customer account, such as **#accounts-teathyme** and **#account-beta**. If you scroll back far enough in a channel's history, it begins with early pre-sales details on the company's size, the potential size of a deal and any initial contacts. Later in the sales process, the channel includes drafted contracts, negotiations with the customer and deal approvals.



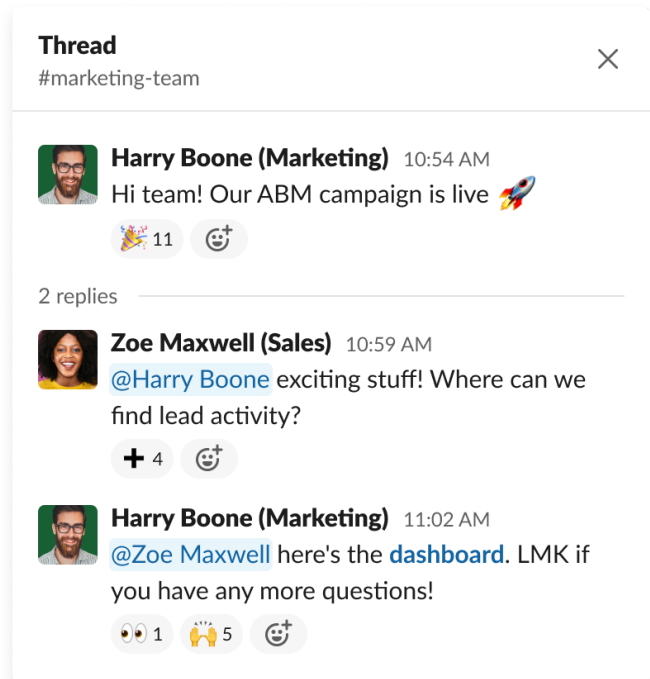
Say an exec needs to meet with a customer, or a new account manager takes over the client. These team members can join the account channel to see the full history of Slack's interactions with that customer.

This level of transparency creates a connected internal experience—which translates to a connected customer experience. Every sales leader **surveyed by IDC Research** agreed that Slack helps them collaborate with non-sales teams.

The sales team at software company **Splunk** uses Slack to provide a united front for their customers within a fast-paced environment.

“Team selling is, especially now in these virtual worlds, critical, and Slack is a massive ability for us to do that successfully,” said Quentin Packard, the AVP of global new product sales at Splunk, during a session at **Slack Frontiers 2020**.

By using **threads in Slack channels**, members of the sales team can find the information they need—when they need it. Teammates can start threads from any message in order to ask a question, add context or give feedback without disrupting a conversation's flow. For example, if a sales representative needs to double-check a detail from a partner on the marketing team, the rep can quickly find the information he or she needs in a thread.



Boost buyer experience by giving reps instant access to the whole company

“Slack democratizes learning because you can reach out and contact someone from the marketing team just as easily as you can with someone from your own sales team. Because everyone in the company is on Slack, the platform doesn’t create boundaries,” says Linda Page, the AVP of global field enablement at Splunk.

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Linda Page
AVP of global field enablement, Splunk

Collaboration is a core competency for members of the sales team at **Lyft Business**, a rideshare and ground transportation platform. Reps work closely with the marketing and IT departments to sign up new customers.

Before Slack, the Lyft sales team didn’t have a place to collaborate on creating a custom offering for key accounts. It’s important for them to be able to work cross-functionally and understand what teams can be leveraged to create a comprehensive partnership package for clients.

“With the ability to create channels and groups in Slack, **we’re able to actually learn about what other people are doing and increase the velocity of the work we’re doing**,” says Tyler Lefebber, manager of travel partnerships at Lyft.

It’s not just Lyft Business that sees faster deal velocity when it unites cross-functional teams in Slack. The average sales team using Slack sees a **13% shorter overall sales cycle** and is 16% quicker to issue an offer.

In today’s fast-paced world, your sales reps need tools that let them quickly draw on your entire company’s strength and knowledge. Slack empowers them to stay connected, equipping them to close deals and form happy, long-lived customer relationships.

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Source: “**The Business Value of Slack**,” IDC, 2017



Equip reps to do their best work

We've seen that reps must work closely with both prospects and internal teams in order to deliver a great sales experience. The problem is, many reps simply lack the time and skills needed to really invest in these internal and external partnerships.

Salesforce found that sales reps **only spend 34% of their time actually selling**. The other two-thirds of their time is spent on administrative tasks—generating quotes, gaining approvals, manually entering customer info, and so on. In fact, the top five things that reps say they spend too much time on, according to Salesforce, include administrative work: managing emails, finding the right person to contact and logging activities.

These tasks get in the way of reps' high-value work around closing deals. They have little time to research competitors, delve into a prospect's needs, and learn about their prospect's current solution.

Time is only part of the productivity equation—skill is the other. On-the-job training is **one of the most effective ways** to build employees' skills. But in sales, managers often miss real-time coaching opportunities due to low visibility into their team's day-to-day activities.

When internal and external sales conversations are limited to a few inboxes, it's tough for reps to get an outside perspective. They're

often stuck between moving a conversation forward quickly and getting the input that could help them do the job better.

Because of these communication silos, our new remote reality makes on-the-job training more challenging than before. Managers can no longer walk the sales floor to offer help or pop over to someone's desk for real-time coaching. Opportunities for improvement too often slip through the cracks.

The best sales reps focus the bulk of their time on high-value tasks and constantly develop their skill set. So if you want a more effective sales team, you need to create the right conditions for these reps to emerge.

Slack helps you scale rep performance

Slack helps you maximize the potential of your sales team by increasing team transparency and the speed of collaboration. Our platform empowers sales managers to boost productivity, ramp new reps faster and, ultimately, upskill your team.

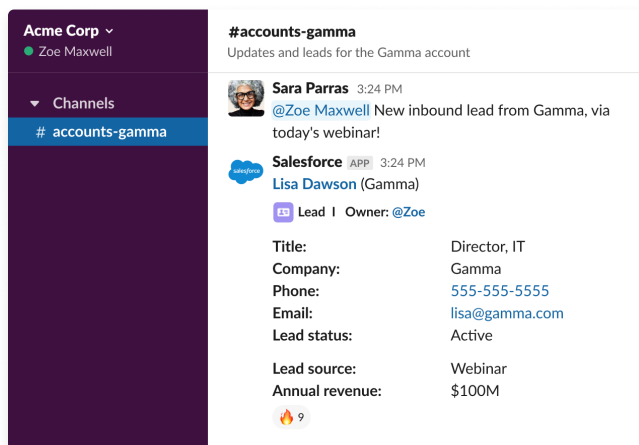
Slack provides a central hub where reps can interact with all the core tools they use every day. No more switching back and forth between inbox, CRM and other sales enablement tools just to update a single customer record. Slack integrates with



Equip reps to do their best work

thousands of popular sales tools, so account teams can log critical account activity directly from Slack or update opportunity stages on the fly.

Slack integrates with popular CRMs like **Salesforce** and **HubSpot**, as well as other key tools like **DocuSign** and **Highspot**. Our integrations in the **Slack App Directory** help reps manage notifications in real time and access the data they need—all without ever leaving Slack.



Lyft Business' reps use **Troops**, an integration that connects Salesforce and Slack, to update deal stages and their pipeline dashboard right in Slack. The benefits here are twofold: a rep doesn't have to update each individual deal in Salesforce, and key stakeholders get greater visibility into the pipeline.

"We're spending more time prospecting and less time on the administrative work updating deals in Salesforce," says Lefeber. "There's no doubt reps are able to source more business and close deals faster."

Ultimately, software integrations increase the amount of customer-facing time for a rep—a central success metric that positively affects other KPIs.

At **HubSpot**, the key to helping sales teams improve productivity and close deals is ensuring that they have the right information at their fingertips. Because all internal communications for the sales team are in Slack, integrations with **Gong** and **Google Drive** provide easy access to sales conversations and intelligence, as well as content to share with customers.

"If you can maximize customer-facing time and you can prioritize the set of activities during that customer-facing time, then every minute should yield incrementally more in terms of the output," Yamini Rangan, the chief customer officer at HubSpot, **shared at Slack Frontiers 2020**.

The real power of integrations comes with automation. With Slack's **Workflow Builder**, you can essentially create robot admins to take busywork off your reps' plate—no dev resources required. Automate workflows between multiple tools to create everything, from custom account dashboards to notifications to automated approvals processes—all accessible with just a few keystrokes from the user.

Slack's own sales team uses a custom workflow called **Approvals Bot** to standardize, automate and streamline the full deal approvals cycle. This workflow pulls all necessary approvers into a dedicated Slack channel. The bot automatically posts a message outlining the deal structure,



Equip reps to do their best work

non-standard asks and justification for granting them, along with the relevant quote lines with information from Salesforce.

Any approval interactions take place within the Slack channel, and the original approval request automatically updates with custom emojis to convey the approval progress.

ApprovalsBot Deals APP 2:51 PM
@Sara Paras is requesting approval for Acme Corp. - Plus - ELA - 2020-10-30

👍 Approvals Required:

Slack > Legal > CRM > HR

📄 Proposed Structure:

Close Date:	2020-10-30
ACV (Churn):	\$10,000
Billings:	\$90,000
Total Contract Value (TCV)	\$180,000
Subscription Term:	24
Max Implied Discount:	10%
Payment Terms:	Net 45
Payment Frequency:	Standard

👉 Asks & Justification:

- 2 year renewal with discounts contingent upon "early" signature. Renewal due on 10/31 and they have agreed to sign by 10/9.
- Net 45 payment terms in line with prior year
- Publicity included

📄 Quote Lines:

Plus plan x 500 seats with implied discount 10%

Thanks to this custom workflow, more than 80% of our sales deals are being approved directly in Slack instead of in Salesforce. Approvals Bot **sped up our deal cycles by 70%**—the app’s proposal templates and automation alone have saved our sales teams hundreds of collective hours.

“These Slack apps and automations drive the most productive output when reps are

customer-facing,” Wayland shared at [Slack Frontiers](#). That’s consistent with what other companies see as well—**87% of Slack users** say the platform makes them more productive.

87%

of users say Slack makes them more productive

Source: “The Future of Work Study,” Slack, 2018

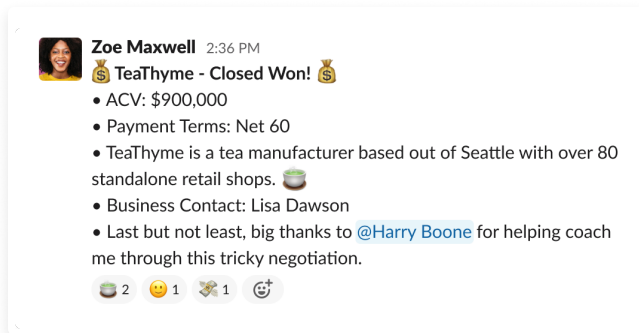
When it comes to upskilling reps, the key is collaboration—no one sales manager can capture every in-the-moment coaching opportunity. Slack creates an environment where teams can proactively share what they learn from deals (won or lost) and make best practices and strategies fully accessible, even across markets. This democratization of rep development makes it possible for teammates to coach and learn from each other on the job.

The sales team at customer service platform [Zendesk](#) leverages several dedicated channels to foster this environment. When someone closes a big deal, they post it in **#winwire**, giving teammates a chance to congratulate each other and connect about winning strategies. In **#askaboutdeals**, the revenue operations team answers finance questions, and in **#coolcustomers**, teammates share interesting use cases and highlight successful deployments.



Equip reps to do their best work

Thanks to enhanced transparency, **86% of sales teams** say it's easier to share key learnings through Slack vs. other tools. With Slack, collaboration is the default way of working. Everyone wins together as a result.



This environment of transparency and collaboration also makes it far easier to onboard new hires and transition reps. Slack creates a single, historical source of truth for documenting and sharing best practices, processes and account relationships.

By bringing this information into Slack channels, new hires and transitioning reps can quickly get up to speed on the sales cycle and build credibility with customers from day one. No more bugging coworkers for documents or sifting through forwarded email chains—everything reps need to know about their team and accounts is right at their fingertips.

Thanks to this instant access, teams that use Slack **reach full employee productivity 24% faster**.

Splunk uses Slack to facilitate onboarding. Slack channels are searchable, so it's easy for Splunk's new members to find the messages,

Teams that use Slack see **24% faster onboarding and reach full employee productivity 24% faster**.

files, channels and people they need to get up to speed.

“If you're new to the Splunk team, one of the most important things is to get connected to the ecosystem of historic knowledge and cross-functional partners in Slack,” says Page. **“Engaging with the right Slack channels can really accelerate the learning period. We bring new team members into Slack channels so that they can ask questions, see their colleague's questions and just have contact with the ecosystem.”**

To boost their productivity, sales reps must prioritize high-value tasks and build the skills needed to work more effectively. With Slack, sales teams can make progress on both fronts. Reps can delegate admin tasks to bots and quickly learn from internal experts to move quickly and close deals.



Helping is the new selling— and that starts with your reps

The new normal of sales depends on solutions and relationships more than ever before. Slack gives you the tools you need to create a sales environment where reps focus their energy on relationships with prospects instead of focusing on administration and coordination.

“Helping is the new selling,” says Rangan. “In Slack, we’re able to reach out to customers and make their lives easier, even when we can’t meet in person.”

Human connection feels like a rare commodity these days. Make it your competitive differentiator with Slack.

To learn more about how Slack can help your company enhance the effectiveness of your reps and sales relationships, [contact our sales team](#).



About Slack

Slack makes work simpler, more pleasant and more productive. It's a channel-based messaging platform for the enterprise that brings the right people, information and tools together to get work done.

From FTSE 100 companies to corner shops, millions of people around the world use Slack to connect their teams, unify their systems and drive their business forward.



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