Making the most of **AI-powered sales** in CRM
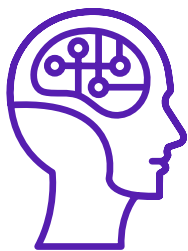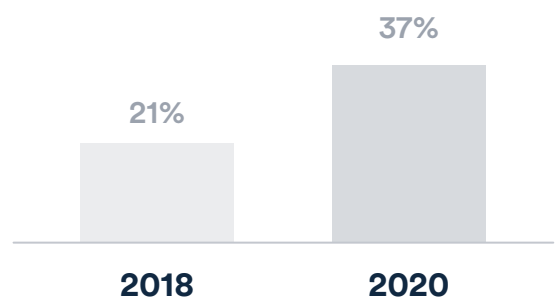
How to get CRM users on your side

The growing prevalence of AI-powered sales in successful organizations

76% growth

The number of sales organizations reporting AI use in Salesforce's biennial State of Sales survey.

21% — 2018

37% — 2020

2.8x
more likely to use AI

High performing sales organizations were 2.8x more likely to use AI than underperformers.

CRMs have rapidly evolved from databases – a "digital Rolodex" to many organizations' single source of truth.

So it's more important than ever to make sure CRM teams input accurate and complete data and keep them up-to-date.

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CRMs and AI

Hartmut Hahn
CEO & Co-Founder, Userlane

CRM systems have come a long way since they were first invented. The software, of course, started as a way of keeping electronic records of customers' contact details and other useful information. But these days, they are the main way managers keep track of their pipeline of sales and the health of their accounts. CRMs are increasingly integrated with a company's enterprise resource planning (ERP) systems, giving company leaders true, end-to-end visibility of business processes otherwise known as the "single source of truth."

There are hundreds of CRM systems available. These range from multi-functional, highly adaptable environments, like Salesforce, to stripped-back interfaces like Zoho. And there are specialized CRMs for particular industries such as the travel business's Travefy.

AI tools - both those within CRMs, or external software that works with CRM – can provide actionable insights and predictive analytics, especially when integrated with an ERP so salespeople and managers have enhanced information at their fingertips.

But, as in so much with technology, human-entered data is key and so we have created this guide to help sales leaders maximize the amount of good data their team is entering.

Since 2020, the increased need to digitize workflows, enhance customer and employee experiences, and boost the efficiency of their commercial and operational teams has been driving the exponential growth of demand for advanced CRM solutions. They have now gone beyond 'nice to have', to essential 'stay afloat'.

Andie Dovgan
Chief Growth Officer at Creatio, low-code solution for process management and CRM

91% companies
used a CRM

Grand View Research found 91% of companies with 10 or more employees used a CRM in 2021.

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The benefits of an AI-powered CRM system

Nearly every aspect of the sales process can benefit from predictive analytics. Countless tools are available, from novel customer segmentation, via automated lead-scoring and grading, through to gauging the effectiveness of your sales force at a glance, to cross and upselling opportunities.

Some of most useful and popular predictive analytical tools help close sales or reveal correlations between individual salespeople and successful outcomes.

Maybe Mohammed makes more sales with clients who own boats because he, too, sails. In retrospect, the decision to give him the accounts of people who live near the coast is a no-brainer. But it was AI that made the connection. This is the kind of data – Mo and customer's hobbies and interests – that can help build rapport, nail sales – and enhance analytics.

Then there's the more conventional form of customer data that AI can make use of to help predict the best time to try and close a B2B sale. This could be asking about the progress of projects within a company, such as an IT upgrade. CRMs can also scrape company news from a newswire or LinkedIn. This, in turn, can trigger an outreach call, say an important departmental hire.

However, these predictions are only going to be possible if the AI has the data available. And sales leaders won't be able to find these kind of data – about sports teams, project progress and geopolitical-related delays – in ZoomInfo or Dun & Bradstreet. They can only come from salespeople entering them after engaging in interactions.

23%
Selling
Salespeople only spend 23% of their time selling.
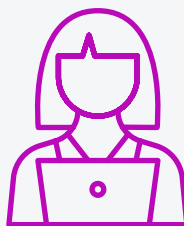
33%
Admin
Admin, meanwhile, consumes 33% of their day.

Source: Pace Productivity

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The pains of gains

An expensive CRM with no good data is like a Ferrari with no fuel. Without a sales team entering complete and accurate data, sales operations will not be able to recoup the full benefits of AI, spotting opportunities and predicting outcomes in a CRM system.

Unfortunately, that's not how the sales team tends to see it. They might find entering data a tedious waste of their time which only detracts from their ability to close sales. In their mind, that happens by working the phones and getting to know their marks. They certainly don't want endless training days.

Worse, there's a distinct possibility they view CRM software as your way of keeping an eye on them.

Many of the best salespeople are those who refuse to play by the rules. If they are making sales, what's the problem? These people can be extremely skilled at creating department-wide opposition to your best-laid CRM plans.

And top sellers will only be convinced of the value of marrying AI to your CRM environment when they see results from increased sales. It's a seeming catch-22.

That's why it's vitally important to have a thorough strategy to encourage your sales team to enter as much accurate data as possible and keep customer records up-to-date.

To help you in your quest, we have created a three-part plan to help drive your operation-wide data program.

The three-part strategy is divided into the following sections:

Making it useful

How to sell the benefits of your CRM to skeptical salespeople

Keeping it simple

A tailor-made interface to encourage more data to be entered

Encouraging good behaviour

How to reward great data entry and dissuade laziness

87%

of sales teams are unsatisfied with their CRM due to the difficulty using tools or requirement for manual tasks

Source: Interface.ai

75%

of companies say it's increasingly important to close more deals for their teams

69%

desire turning more of their contacts into customers

33%

claim increasing revenue from existing customers is a priority

Source: Hubspot

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Making it useful

Instead of being a time-suck, CRMs are a valuable productivity tool for sales people, rendering everything that bit easier and boosting performance. Team leaders should focus on salespeople's pain points and demonstrate how the CRM system can ease them. Here's how.

- Show them how much better their lives would be if all the information about client details, notes and last touches were in one place. There would be no need to search around for that Post-It when a valued customer calls up.

- Demonstrate the way a CRM can automate report creation with the click of a button. Salespeople tend to hate reporting, but only because they are compiling them from multiple spreadsheets.

- Reps might like to know a CRM can replace Google and Outlook calendars and bring up the relevant info when the alarm goes off.

- Sell the benefits of data analytics to your team. There's software which guides users towards the most profitable, most likely prospects. Other tools predict which customers are likely to come back for more and are most likely to welcome cross and upselling. And integration with LinkedIn or news sites can give team members useful information about clients such as a departmental reorganization or a new acquisition. Perfect for outreach.

- Find out what salespeople find most useful by tracking behavior in a digital adoption platform (DAP), an interactive walkthrough of common tasks. The insights will help you create a regime of continual improvement leading to greater engagement, increased adoption and a must-use platform.

> **Jonas Laue,** CRM consultant for digital transformation experts, Sopra Steria, remembers a CRM project where users had to enter values and currency information to seven decimal places.
>
> Unsurprisingly, he says, "the system wasn't used very much and, in the end, it died because no one wanted it. It was a huge waste of money. The user also needs to see a benefit, not just create reports."

8-14%
sales cycle complexity reduction

The improved data accessibility offered by CRM technology can reduce the complexity of the sales cycle by 8-14% on average.

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Keeping it simple

If you want your salespeople to enter data into your CRM, you need to play your part – make it as simple for them as possible! If it's seen as too hard, people will speedily revert to those scribbled notes, Excel spreadsheets and other parallel systems. Here are our tips to make their lives easier.

- Is your CRM tailored to their workflow, either by software choice or design? Make sure to configure platforms to the needs of a B2B or B2C sales team with more or fewer fields as required. Map out the department's current process, which roles are performed by which people and how the CRM can support this.

- Help save time by creating dropdown menus for anything reps will be doing on a regular basis such as sending out product samples.

- You are trying to "level up" with your CRM. But make sure the team knows what changes are coming. Consider a newsletter to keep everyone up-to-speed.

- Training is frequently considered a must-have, especially at the beginning. But there are alternatives that don't get in the way of achieving quotas. A DAP will also help answer questions before they are asked, remove frustration with complex processes and ensure correct data is being inputted.

> Luckily, the nature of a CRM is that you can see where things are going right or wrong and where people are struggling.

> "It's very helpful to have a system with a good user experience: simple system design, clean interface, and highly intuitive processes. A user should know what to do and where to click to get information at the first view, not scrolling through hundreds of different fields."

Jonas Laue
Consultant at Sopra Steria, digital transformation consultancy

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> "With digitalisation it's easier to know if the users are working efficiently and you have to figure out the right tool to guide the user in the most efficient way."
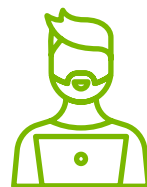
Hans Egger
IT Solution Manager at RATIONAL Technical Services, leading professional kitchen manufacturers

34%
of people experience frustration or difficulty when using software at work
Source: Userlane

Only 18% of a sales rep's time is spent in CRM even though 62% is spent using sales technology. 10% of the time they are in spreadsheets carrying out tasks a CRM could do.
Source: InsideSales.com Labs

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Encouraging good behaviour

Once you have created a useful and optimal environment for a team, it's time to lay down the law and make sure people follow it. Inside the velvet glove of encouragement should be the iron fist of determination that everyone uses the system. Unless sales managers get buy-in from everyone, the tools won't work properly. And those who refuse could spread dreaded rebellion.

This is what we recommend:

✓ What language do salespeople understand? Incentivization! Offer these competitive and driven people prizes and bonuses. These could be for filling out the most data, logging the highest amount of sales on the CRM, or creating the most new records. After the initial excitement, create a leaderboard containing those who score the most points.

✓ The competition will help you find a "CRM champion" to foster connections between the software and your team. Make sure this manager is also a tech fan, resourceful, well-organized and communicative because part of their promotion entails making team members, particularly "old-timers" feel valued and supported.

✓ Make it harder to enter bad data than good to prevent "garbage". Many CRMs or DAP overlays can be set to lockout all-repeated numbers or 12345 for zip codes. You can also require certain fields to be filled out before a record is saveable.

✓ To discourage people who think they are cleverer than you, warn reps they stand a chance of losing a commission percentage if they are found to be gaming the system.

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CRM and AI enter the future together

AI is clearly the future of sales. In the months and years to come, reps will see increased productivity and reduced work.

They will have hugely better insights into account health to retain more clients, identify new targets and boost revenue. The ultimate goal is being able to have one-on-one encounters with customers knowing for sure what they demonstrate and talk about is exactly tailored to them.

But two things won't change, at least for a while: a CRM system as the "single source of truth" and the requirement for high quality, personal and relevant data. And that comes through human-to-human interactions.

Connecting people with technology

At Userlane, we believe people should feel empowered by technology. That's why we help sales leaders create a seamless and delightful CRM experience for their users. Our fast and innovative guides and supports salespeople through the process of using their CRM automating training and support within the software and improving your sales workflow.

Luke Talbot
Chief Product Officer, Userlane

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With Userlane, help is just **one click** away.

Speak to the team to hear how we can help you achieve your goals.

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