

ORACLE

Essential Strategies for Artificial Intelligence in Sales Force Automation



A TWELVE-MINUTE READ



Help sellers sell more with intelligent automation

Imagine sellers enthusiastically logging into a sales force automation tool each day, eager because it helps make their jobs easier, drives revenue, and helps create happier, more productive employees.

Despite its promises, today's customer relationship management (CRM) solutions fail to meet expectations. Most sellers begrudgingly work with solutions but most businesses lack the systems of intelligence to compete effectively.¹ Meanwhile, companies that have invested millions of dollars in the tool want to get more value to support sellers amid changing customer expectations.

This strategy guide outlines how companies can realize a return on investment from sales force automation. Through artificial intelligence/machine learning and comprehensive account-level data, sales teams can focus on winning opportunities, accelerating deals, and maximizing revenue.



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Sales force automation, defined

Sales force automation (SFA) is a component of CRM, with some important distinctions to keep in mind.

A CRM keeps all data related to accounts, contacts, leads, opportunities, customer interactions and sales activities in a single location. This data comes from multiple sources such as marketing automation systems that provide insights from events, websites, emails, phone calls, customer lists, and social media. Sales-derived sources include contact and account enrichment services, outreach and engagement, relationships and account mapping. While there's some overlap, SFA provides deeper understandings of the sales process, identifies how to streamline certain processes, and prioritizes the most critical tasks. SFA includes sales manager tools such as dashboards that provide visibility into pipeline, forecasts, and seller performance.

Historically, SFA might have been labeled a misnomer because there's nothing automated about a system that requires sales reps to manually enter data multiple times. Increasingly, artificial intelligence (AI) makes automation of sales activities and engagements possible and more effective, such as providing recommendations and helping prioritize actions that can't be automated, such as deciding whom to contact, with what offer, and when. Gartner uncovered two clear trends from hundreds of conversations they had with sales force automation leaders.



Sales leaders increasingly want and need to build data-driven sales organizations.



Achieving value from the sales force automation investment is a necessity.²



Sales force automation, defined

Vendors are introducing AI to automate selling and pipeline management, and to help sellers engage more meaningfully with their prospects and leads. Consider using AI to drive revenue during these sales processes.



Forecasting: Apply AI with predictive capabilities and individual seller propensities to anticipate and identify factors that increase forecast accuracy.



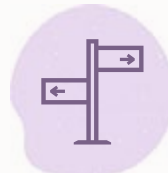
Lead scoring: Marketing applies AI to deliver optimized leads, reduce guesswork, identify hidden relationships, and connect data dependencies.



Pricing optimization: Test flexible price strategies to maximize profits across customer and product portfolios based on variable factors.



Personalized content: Craft appealing collateral tailored for individual needs to help drive more meaningful human interactions.



Guided selling: AI-backed coaching uses real-time buying signals to tell sellers what to do next, which content to send, products to recommend, and when to contact to maximize opportunities and close deals faster.



Chat bots: Collect front-end data from customers and suggest best-practice answers before a more informed human seller makes contact.



Lead, account and opportunity management: Unleash AI to spot leads and opportunities which may be at risk for stalling, and to reactivate dormant accounts.

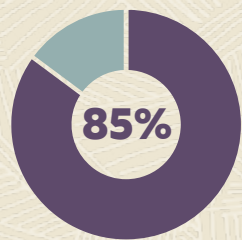
With these opportunities in mind, let's start building your strategy for sales force automation.



Building your foundational strategy

The sales force automation value you get is only as good as the data it uses. Because data issues can delay progress, scaling beyond a proof of concept can be challenging.

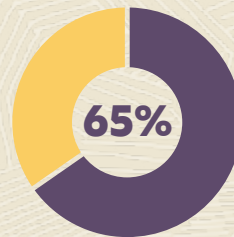
Access to internal data represents the best repository of customer-related insights that you can integrate with CRM data for more precise customer segments. This blend of internal data is often a company's only proprietary, competitive advantage. When your AI can access all of your customers' historical data—purchase history, procurement, and inventory systems—your sellers gain a thorough understanding of clients' relationships with your brand.



85% of sellers admit having made potentially embarrassing mistakes due to faulty CRM data.⁴

Incomplete data leads to fragmented selling and customer experiences. Without access to this data, sellers won't trust the AI recommendations unless the data is accurate and complete. If sellers can't train the system so its intelligence and usefulness can be shared across the organization, mistrust will spread.

You don't want to roll out an AI program to great fanfare, only to have sellers reject it shortly afterward. Build credibility by running AI to cleanse and enrich as much complete internal customer data as possible in order to then—use AI to build good models.



65% of AI adopters have yet to receive business value, but 93% expect to because they believe it's the way of the future.⁵

To build a strategy that can overcome these challenges, keep these few things in mind.

1. Business and financial goals

To re-tool your sales organization to succeed, have a clear understanding of your financial priorities, goals, and objectives. This will help identify opportunities in other aspects of your company's value-building chain. Consider your sales model—whether it's direct, channels, or both. Structure your AI strategy around the most essential sales processes to gain insights and make you more agile and results-focused. Consider how renewal selling and a subscription model could be a winning competitive differentiator.

2. Innovation, data, and automation

The current technology stack poses a common obstacle for many companies, characterized by a mishmash of add-ons and custom integrations that prove complex and costly to maintain and scale.



Building your foundational strategy

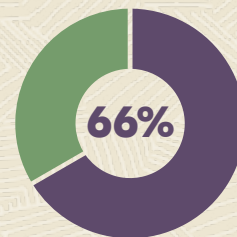
- Consider a unified IT stack with a common data model to help scale a sales force automation solution.
- Use sales automation that maps to better data quality. This helps reps eliminate manual tasks so they can sell more.
- Integrate new technology innovations, such as AI-based insights to better identify the best accounts to focus on and how best to engage.
- Make sure your technology investments can grow with your business, so your apps and experiences stay on the cutting edge.

3. Customer-focused processes

Customers expect and demand more from the companies with which they do business. Envision how an AI-enabled sales process could improve your company's brand reputation by understanding customer-based strategies.

- How complex are your products and subscriptions for customers to self-service, get configurations, prices, and quotes?

- Is account data updated in real-time, every time, with the latest customer updates, order history, and other miscellaneous data?
- Do you approach your customers with relevant and timely offers that make sense for their business, or do your sellers guess when and what to pitch?



Two-thirds of sellers would rather go to the dentist than update their CRM.¹

4. Employee-focused experience

Sales force automation should provide your reps with all the data they need in a single location to help them close deals. SFA should be so valuable, helpful and successful that reps thrive using it. A great user experience helps sellers crush their quotas, fuels innovation, and evolves an organization's digital maturity to delight customers.

- Imported leads need to be augmented with real-time, up-to-date information.
- Explain to sellers why they should trust the AI to track and score leads/accounts.
- When a rep leaves, your system retains all the history with their customers and prospects.

5. Ensure executive sponsorship from the get-go

All projects start with excitement but can quickly result in a sea of frustration as issues around projects unfold, like a missed deadline or deliverable. AI is no exception, as cultivating early adopters may not come quickly or easily.³ Maintain a long-term vision for the company. You'll get more out of your SFA solution if you include your chief financial officer and chief human resources officer for visibility into selling hierarchies instead of sharing spreadsheets with reps, skillsets, and territories.



Six steps to get started with sales force automation

01

Educate stakeholders to support successful AI results

Sales and marketing leaders need to understand the concepts and business opportunities of data, machine learning, and AI. Read the research and consult with analysts and experts to broaden the necessary knowledge for consensus and vital communications.

02

Conduct an internal data audit

Don't take any shortcuts. You want data that's clean and de-duped. Once you identify valuable data, automate some current sales processes using the internal data that you need. After you've AI-enabled sales processes that add value, explore others to add to your arsenal.

03

Keep a single source of truth

Make sure all of your data consolidates in a centralized solution so that everyone works from the same customer data.



Six steps to get started with sales force automation

04 **Enrich your customer data**

Once you have a good data foundation, you can enrich it with trusted third-party data sources from partners. These additional, multidimensional insights help score leads and provide smart talking points about the account that wouldn't be known otherwise.

05 **Connect sales and marketing**

Integrate sales and marketing data to provide a unified experience for both customers and sellers. You can connect service, loyalty, and commerce data, too. Using this data helps sellers craft personalized conversations with their leads and customers that help drive revenue.

06 **Take a 360-degree customer approach**

Connect back-office data, so reps know how an account connects with the brand—whether through sales, the web site, a service call, etc. Companies often come up short. While all sorts of data exist, reps may not know the last thing the customer bought or the last time they made a service call.



How a sales force automation solution helps

Sales force automation enables the delivery of better, faster, and more tailored customer and sales experiences.



1. AI drives speed and efficiency

AI innovations with SFA automate time-consuming admin tasks for sellers, helping them to prioritize and focus. It proactively identifies risks and helps advance deals at an accelerated pace. It drives intelligent forecasting and business planning.



2. Trustworthy results start with clean data

Performing a CRM data health inventory is crucial to prepare SFA for all sales, prospect, and customer-related data on an account, contact, and location basis.



3. Make use of all customer engagement

Integrating the SFA with marketing and service data better equips sellers to engage customers with consistent and up to date information across multiple touch points and can be shared across the sales team.



4. Integrate back-office customer systems

ERP, supply chain, and other applications with SFA gives sellers a comprehensive, real-time understanding of customers—and breaks down siloes between sales and finance.



5. Align SFA with the digital customer strategy

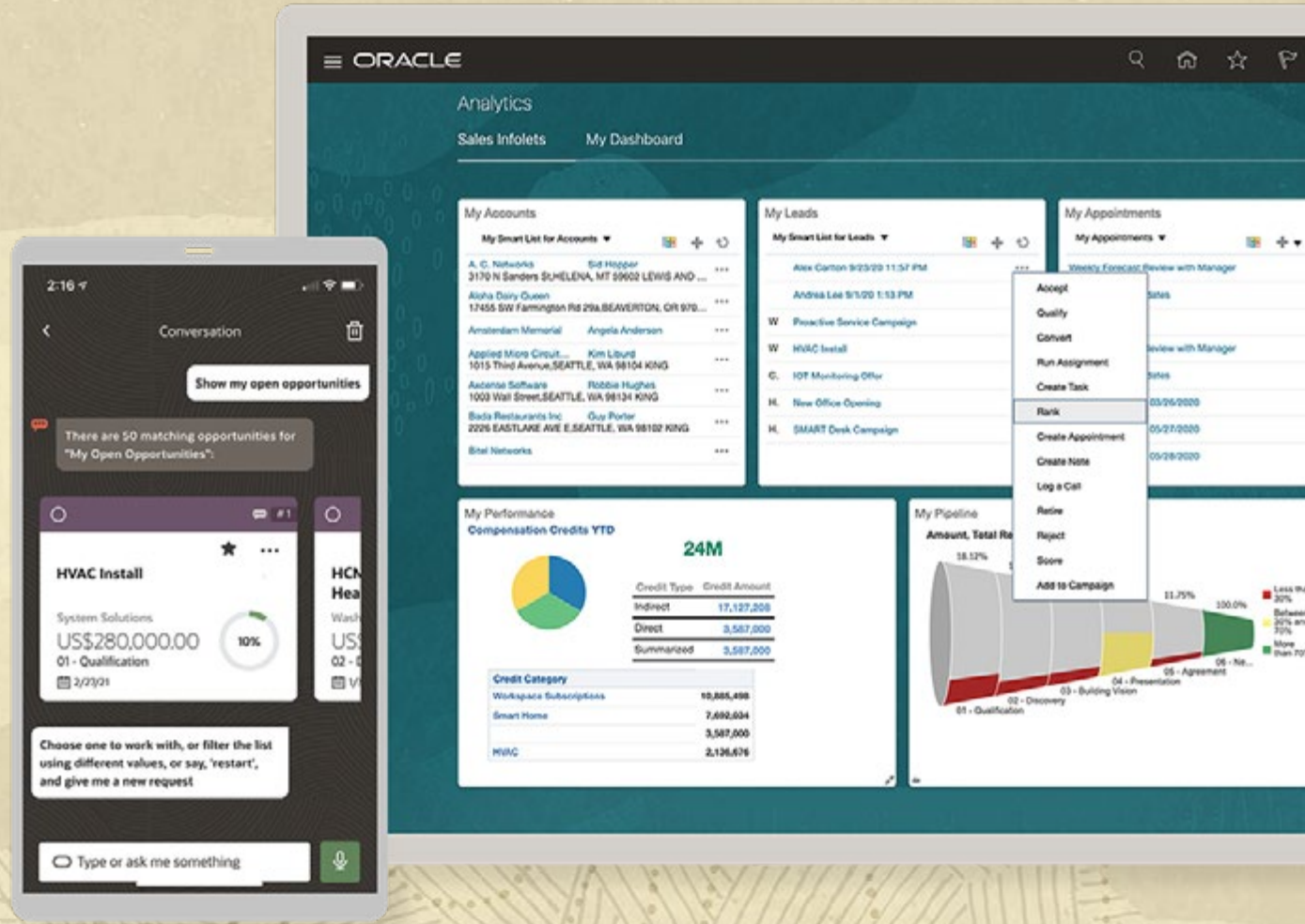
More than adopting AI, machine learning, and reporting, the push to improve selling-based systems should align with the organization's digital optimization strategy as customers change and evolve.



Develop better, more profitable customer relationships with Oracle

Automate and simplify data entry and use mobile interactions to give your sales teams more time to engage with customers and prospective customers.

Want to know more?



To the experience-maker who's always moving forward

As modern customers seem to shape-shift from one moment to the next, it's critical to maintain pace with their expectations. To help, we created the Ignite series to fuel your continuous pursuit of customer experiences that always hit the mark.

Guides like this one on sales force automation aim to advance your expertise and help you craft foundational strategies in less time. So you can get back out there to captivate customers and drive revenue.

What will you discover next?

- [Learn more about artificial intelligence](#)
- [Explore AI for Sales](#)
- [Essential Strategies for Sales Performance Management](#)



About Oracle Advertising and CX

Make every customer interaction matter by connecting all your business data across advertising, marketing, sales, commerce, and service. Oracle Advertising and Customer Experience (CX) is a connected suite of applications that goes beyond traditional CRM to help you create and nurture lasting customer relationships. Build a complete view of every interaction and every customer, no matter how and when they engage. Empower your entire business to deliver exceptional customer experiences—from acquisition to retention—and everything in between.

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