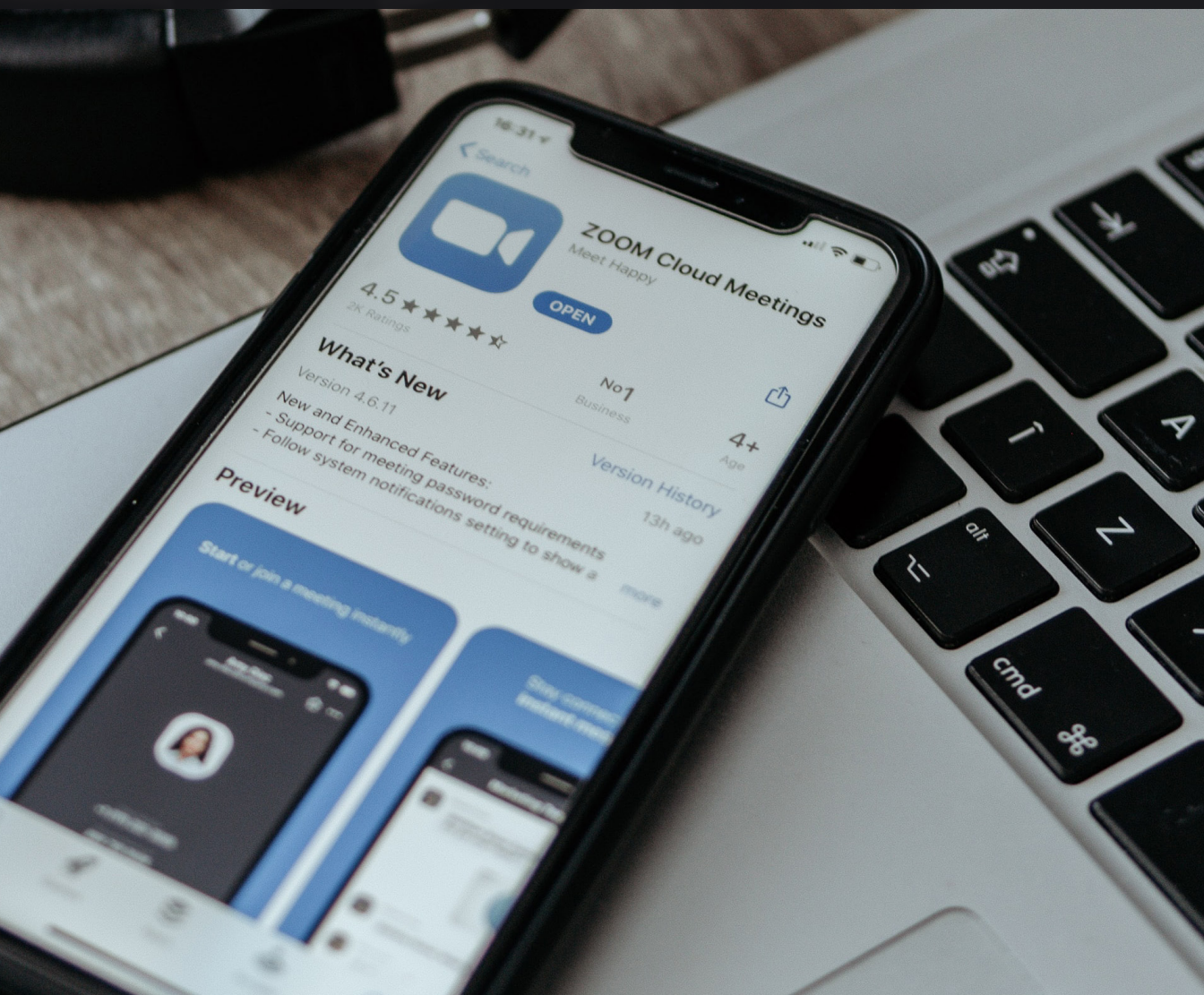


5 Tools To Ease Your Sales Team's Transition to Remote Work



Introduction

Most sales teams are used to pounding the pavement. Your team is on the road, making introductions, setting up meetings, and generally just getting in front of prospects and customers. The COVID-19 pandemic has interrupted that.

Sales is the revenue driver of most companies, if they're not working, you're not selling. If you're looking for ways to help your sales team keep the momentum going, even as they transition to remote work, we have a few suggestions for you. **Here are a few of the tools we've been using, that we trust to help your sales team replace their traditional sales tactics with work from home tools:**

What's Included

03 Swap In-Person Meetings & Introductions with HubSpot's 1:1 Video Tool

04 Use Meeting Link Tool to Set Up Meetings

05 Keep up Face-to-Face Interaction with Video Chat

07 Clean Up Your Leads

09 Get Your Email Strategy Up & Running

Make the Most of The Tools Available to You

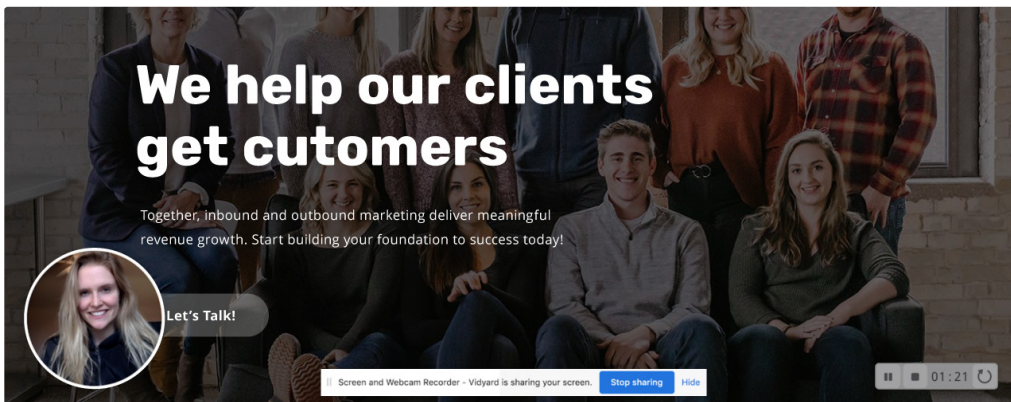
Swap In-Person Meetings & Introductions with HubSpot's 1:1 Video Tool

In-person introductions and meetings are some of the top sales tactics for those on the road. But, your sales team doesn't have to give up that personal connection now that they're at home. HubSpot recently made their 1:1 video tool free for the duration of the COVID-19 pandemic.

HubSpot 1:1 Video Benefits

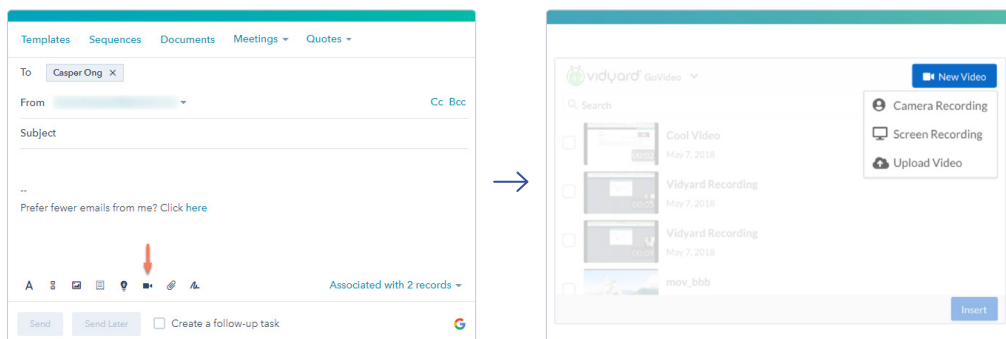
- Your sales reps can take videos of themselves and their video screens simultaneously.
- Your sales rep can give their pitch as they navigate through your website or a sales brochure on their screen.

Check It Out: Here's our Client Success Manager, Brooke using the 1:1 Video tool to scroll through our site. You can see her in the bottom left of the screen!



We know that in-person connections are what close sales and your sales reps know that the best way to keep warm leads moving through the sales process is to connect with them directly. This 1:1 video tool offers that connection, without anyone having to leave home.

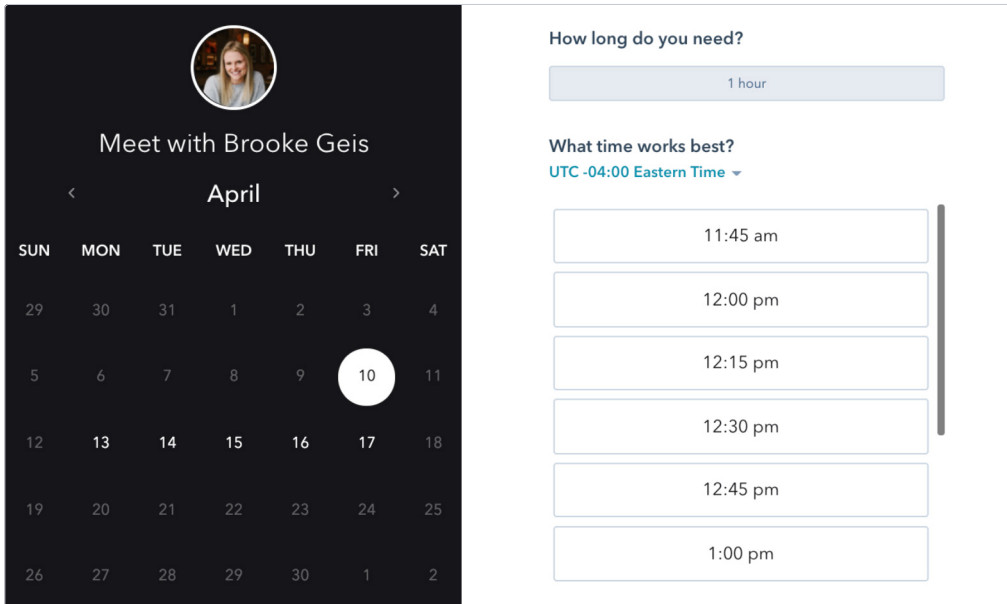
Add Videos to Email: HubSpot's 1:1 video tool is directly connected with your email, especially if you already use the HubSpot portal. There's no hassle trying to attach a large video file or formatting the file properly. Simply take the video, and press send.



02/05

Use Meeting Link Tool to Set Up Meetings

There's a lot of back and forth that goes with setting up meetings. HubSpot's meeting link tool removes that friction. Again, this is a tool that HubSpot has made free to support businesses and sales teams who are now working from home.



Meeting Link Tool Benefits

The meeting link tool allows you to set available time on your calendar, and then send that out to your prospects. They can then book time on your calendar, immediately selecting a time that's convenient for them, and for you. **This is a seamless way to set up a meeting, and it goes along nicely as a follow-up to an introduction video.**

03/05

Keep up Face-to-Face Interaction with Video Chat

Again, face-to-face meetings close sales. They help build that trust and emotional connection prospects need to make a decision. Your sales team doesn't have to forgo that just because they're working from home.

There are a number of free and discounted video meeting services available now that can work for your sales team:

Google Meet

If your team already uses G-Suite, Google has made [the premium version of Google Meet](#) free until the end of September. The premium version offers some fairly robust features to G-Suite customers:

- Allows up to 250 participants on a call.
- Live streaming for up to 100,000 viewers within a domain.
- Ability to record and save meetings to Google Drive.

While you probably won't need to live stream your sales meeting, the extended features mean you get a high-quality video meeting, and the ability to connect with your prospects in person, all for free.

Pro Tip: If you want to see your whole team at once in a grid view like Zoom, you can add this extension to your chrome browser: [Google Meet Grid View](#)

Slack Video

[Slack](#) is also working hard to help businesses out during this time. The workspace chat app is offering **free plan upgrades for up to three months** and has made group calls with screen sharing free as well.

Zoom

If you're looking for a really professional video meeting option, and you're willing to pay for it, [Zoom has a ton of robust features](#):

- Easily to see everyone on the call at once, using grid view.
- Offers screen sharing features like Google Meet, so you can get through those sales calls easily, and as close to in-person as our situation allows.



04/05

Clean Up Your Leads

Your sales team is usually on the road. Drive time takes up a huge portion of their day, and in general, they don't have time to mess around cleaning up your CRM and combing through old leads. Now is a good time for everyone to take just a little bit of time to clean up your leads.

While some of your reps might think this feels like homework, it's a necessary task that can seriously boost your sales team's efficiency. Cleaning up your leads means your sales team can spend more of their time on the hot leads that are ready to buy, rather than fussing with cold leads who aren't. **Here's how HubSpot can help:**

Define Lifecycles if You Haven't Already

If your team hasn't defined a sales lead lifecycle, do it now. We suggest using one of those video meeting options to discuss this with your team.

What Makes a Lead a:

- New lead
- Warm lead
- Hot lead
- Customer
- Cold lead

LEAD STATUS	LAST ACTIVITY DATE (EDT)	CREATE DATE (EDT)
Open deal	Mar 31, 2020	Feb 7, 2020
New Lead	Mar 31, 2020	Mar 27, 2020
New Lead	Mar 31, 2020	Mar 29, 2020
New Lead	Mar 31, 2020	Mar 29, 2020
New Lead	Mar 31, 2020	Mar 31, 2020
New Lead	Mar 31, 2020	Jan 26, 2020
Cold Lead	Mar 31, 2020	Jan 2, 2019
Cold Lead	Mar 30, 2020	Dec 15, 2019
New Lead	Mar 30, 2020	Mar 17, 2020
New Lead	Mar 30, 2020	Mar 16, 2020

Assign Leads a Lifecycle

Have your team work through your CRM to assign lifecycles to those leads. Identifying each leads' lifecycle minimizes wasted time and effort, so your sales team is focusing on the leads that will most likely convert.

HubSpot Bulk-Select Feature: With this feature, your team doesn't have to manually update every lead, they can simply select all of the leads who are cold, and immediately define them all as cold leads.

Get Your Email Strategy Up & Running

Now that you know what leads you've got, it's easy to implement simple, effective sales tactics that optimize your sales teams' time, while helping you close as many deals as possible.

You already know that warm, hot, and new leads get one-on-one attention. **For cold leads and customers, develop email strategies that can work for you to keep nurturing them closer to a decision.**

Start a Newsletter

A customer newsletter, regular update, guide, or checklist is a great way to keep customers engaged, and delighted with your service. **Here are some great ways to keep cold leads in the sales cycle, without wasting your sales team's time:**

- Guides/checklists that explain how to use your product or service.
- Guides/checklists that shows customers new tools and products to improve their business.
- Newsletters explaining company updates, or product updates.
- Newsletters highlighting interesting blogs or articles.

Note: Cold leads and customers should each get a newsletter from you about once a month.

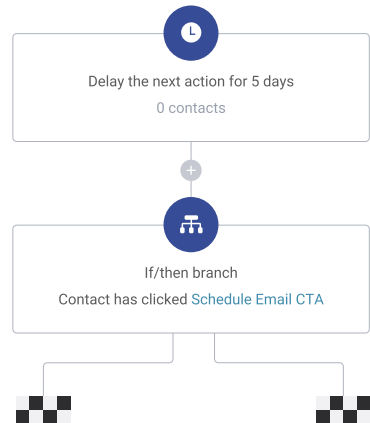
Use Sales & Marketing Automation

Email automation helps your sales team engage and nurture leads, without taking up too much time. **Make sure that everyone is always getting a workflow or sequence that's relevant to their needs.**

HubSpot Email Automation

HubSpot allows you to:

- Easily segment your lists of contacts.
- Determine who gets what campaign.
- Develop automated campaigns with three to four different stages.
- Send out emails accordingly.



Note: Set automated campaigns to notify sales representatives when a lead takes an action that indicates they're warming up. This way, all your sales team has to do is wait for those notifications to come in.

Make the Most of The Tools Available to You

We hope you find these free tools helpful as you transition your sales process over to a work-from-home strategy. **If you have any questions, the Evenbound team is at your disposal.** We'd be happy to walk you through anything that can help you get your sales team back on track.



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