

Zoom leverages AI to automate its sales certification process for its global sales team

The Company

Zoom helps people and businesses stay connected so they can get more done together. From meetings, chat, phone, and webinars to conference room systems and online events, Zoom's secure, reliable video platform powers all of your communication needs. Founded in 2011, Zoom is publicly traded (NASDAQ:ZM) and headquartered in San Jose, California.

Zoom is much more than just video meetings

The pandemic transformed Zoom as a company, bringing it global recognition. However, Zoom is much more than video meetings, and as the world turned to Zoom to stay connected, Zoom needed to teach its target audiences all the different ways its technology could help businesses continue to run smoothly during these unprecedented times. So Zoom's sales enablement team needed to roll out updated messaging to help its sales team reflect this content in their customer conversations.

Mike Fisher, Enterprise Sales Productivity and Enablement at Zoom, explained:



"The same robust architecture and infrastructure that supports our video meeting solution provides an unbeatable customer experience for our telephony, webinar, chat and conference room offerings, and we needed to get the word out about all the ways we could help customers stay connected and adjust to the new normal."



Hear Mike Fisher talk about Zoom's AI sales certification process



The Company

Zoom is for you. We help you express ideas, connect to others, and build toward a future limited only by your imagination. Our frictionless communications platform is the only one that started with video as its foundation, and we have set the standard for innovation ever since. That is why we are an intuitive, scalable, and secure choice for large enterprises, small businesses, and individuals alike. Founded in 2011, Zoom is publicly traded (NASDAQ:ZM) and headquartered in San Jose, California. Visit zoom.com and follow @zoom.

The Problem

- Bringing sales reps around the world up to speed with updated brand messaging reflecting their full solution platform
- Overcoming negativity and low engagement rates with certification programs
- Ensuring standardized scoring and feedback for all sales employees, despite the wide range of experience among sales managers
- Establishing successful adoption of new sales enablement software with cutting edge AI

The Solution

With Second Nature's AI-driven sales coaching software, Jenny, Zoom's sales enablement team was able to:

- Generate excitement and engagement for the certification program
- Achieve 100% participation
- Eliminate friction between sales enablement staff and sales representatives
- Improve skills and message mastery across all sales reps
- Increase the number of practice sales conversations performed by each employee
- Standardize feedback and scoring of practice sessions

How do you get salespeople excited to get certified?

Step one: don't call it certification! Zoom needed to train sales reps located all around the world and certified on the updated messaging, but certification programs typically go over like a lead balloon.

"Everyone hates certifications because 'certification' sounds like homework or final exams; it's tied to negative connotations of being back in school," Mike said. At the same time, Mike and his boss Michelle Dotson, Head of Sales Enablement, recognized a number of obstacles in the way of a certification program on such a large scale.

Mike pointed out that if they expected sales managers to certify their sales teams, they would have to first train the managers. "This meant we would have had to train all managers in advance, teach them a standardized scoring system, and make sure there's a feedback mechanism to explain the scores and provide coaching on how to improve," said Mike. "Additionally, some managers have experience in the Unified Communications market and are used to talking about the value of a cloud-based UC platform, but some are newer to this industry, and feedback from a manager who's experienced is different from one who isn't - so it ends up not always being fair to the reps."

They briefly considered requiring sellers to record themselves giving a pitch and asking managers to review them and give them feedback, but this raised the same issues of needing to train managers ahead of time and find a way to standardize their feedback. In addition, recorded pitches are monologues, and practicing true sales conversations requires a dialogue. They needed a new approach, which led them to Second Nature and a gamified, team-based competition.

Time for a new approach: AI simulations

Zoom turned to Second Nature's AI-powered sales coach, Jenny, to form the backbone of a gamified sales

coaching competition that doesn't include the word "certification."

The company held a big kickoff, with Michelle running through the new deck and highlighting key messaging points. Next, Mike welcomed Jenny -- an AI bot that acts as the reps' practice partner -- and invited her to introduce herself to Zoom's sales professionals on a global Zoom meeting.

Jenny herself explained the rules of the "team-based competition" and even the sales managers themselves were asked to participate. Each team member could pitch to Jenny as many times as they liked, and only the highest score would be counted in the competition. Every sales rep was told the minimum score they were allowed to get was an 80, and the team with the highest average score would be the winners.

Reps normally dread certifications, but by positioning it as a team-based competition using cutting-edge software that offers a private, judgement-free environment to practice your selling ability - the sales org responded incredibly positively. Unlike with regular certification programs, the entire sales department was excited to practice their messaging and "trash-talk" each other on internal Zoom Chat Channels, as teams always knew where they stood and could measure themselves against the other teams.

The secret sauce - "humanizing" the AI

Mike and his colleagues took a lot of care to humanize Jenny. Michelle introduced her as "the newest member of our sales enablement team" with the title of "Sales Simulation Manager," rather than referring to her as an AI bot. They stressed that practicing with Jenny is a safe space where no one will judge you on your performance, and no one will know how many times it takes you to achieve your best score. By treating Jenny like a member of the team - even giving her a fake profile in their HR system - it bypassed the typically skeptical attitude people might have had about trying new software, or having a conversation with a computer program. The salespeople were excited to try it out, and to prove their capabilities using the sales coaching solution.

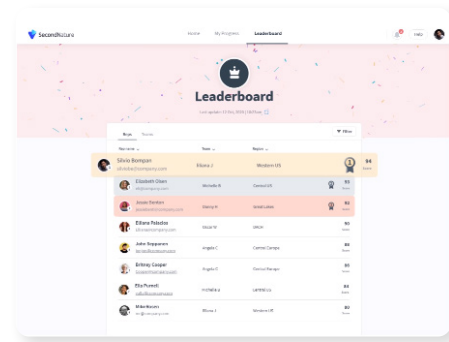
Competition and team spirit yield positive results

No one wanted to drag down their team's score by not participating -- a zero score -- and when they had done it once and scored 60 or 70, for example, they were incentivized to try again and bring it up to 80 or beyond. On average, each sales employee completed the simulation three times, and everyone scored in the high 80s and low 90s, without enablement having to chase anyone.

Altogether, throughout the competition, salespeople spent more than 300 hours talking to Jenny in thousands of simulations. Sales employees appreciated the fact that Jenny really listened to their pitch and gave tailored feedback.

User responses include:

"It was very direct and to the point and I find this type of training more effective than Powerpoint or video instruction."



"I felt like it took the pressure off. Jenny is awesome!"

"We all need feedback and a way to keep practicing. Jenny enables that, Jenny scales that. Now I reached 84 points, but can't wait to get to 100. Thank you Zoom and the sales enablement team for this tool. I personally enjoyed it and can't wait to practice more and more!"

Looking ahead:

Jenny provides a safe space for onboarding and practice

Michelle explained that Jenny is already having a big impact on Zoom's onboarding programs for new sales hires.



"With onboarding programs it's tough to verify if sellers really know the material afterward. I can create the best training but there's no way to know if they've absorbed the content," said Michelle. But with Jenny, she continued, "you can ensure your sellers know exactly what you need them to know."

Michelle Dotson, Head of Sales Enablement, Zoom

Mike, Michelle, and the rest of the Zoom sales enablement team are planning more use cases for Jenny. The goal is to use her as the final assessment for every eLearning course so that sales employees pay attention to the information they're given during the sessions and so enablement can see if sellers have integrated that knowledge into their active toolbox.

"We are looking to Jenny to gamify online learning, and give a whole new reason why a seller should pay attention to their online learning modules, because there's going to be a very real simulation at the end where Jenny's going to take on an important persona and you're going to have to practice overcoming objections with her," Mike said. "Jenny's administering an interactive final exam."

Zoom's sellers loved the competition and are clamoring for more. "Right now the perception of Jenny by our end users is that she's a competition tool. We aim to get them to the place where they just think of Jenny as a safe space for them to practice their sales skills so she can give them real-time coaching and feedback," says Mike.

Mike is confident they'll succeed. He plans to run competitions once or twice a year. The rest of the time, Jenny will provide low-pressure final simulations at the end of online learning modules, without any leaderboards or competition. She'll be a purely judgement-free environment for new and existing employees to verify their knowledge and selling skills.