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eBook

Mastering Guided Selling

3 Steps to Achieve B2B Sales Success.

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Summary

Artificial Intelligence (AI)-powered selling has disrupted the B2B sales landscape. It shifts from traditional to digital selling in this tech-advanced world. Sales software has begun to adapt and now leverages AI to create a new predictive sales playbook to change the game: Guided Selling.

These AI-guided solutions empower sales teams with data-driven insights about customers, making every interaction personalised and relevant to the customer's preferences to build trust. It pushes teams to be more proactive instead of reactive. Using customer data and predictive analytics to foresee changes in customer buying behaviour, identify new up-selling and cross-selling opportunities, and make tailored recommendations.

Guided selling benefits salespeople, as it enhances their performance and increases efficiency in decision-making with a cost-effective, time-saving solution. According to Gartner, companies that utilise them experience 30% higher conversion rates than those that don't. Recent research by McKinsey indicates that companies that invest in AI are seeing a revenue uplift of 3 to 15% and a sales ROI uplift of 10 to 20%. This digital era sales approach will help shorten the sales cycle, boost productivity, and strengthen the relationship between sales rep and customer.



Guided Selling: What it is.

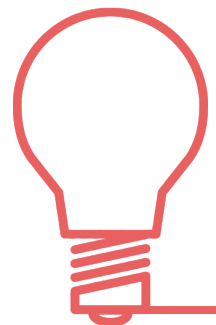
The rise of AI has brought about a meaningful change in B2B sales, with a recent sales process known as Guided Selling. It moves away from traditional sales methods that depend on (mainly) manual input to digital selling that utilises both external and internal sources to create a personalised guide for each sales transaction using AI.

In today's highly competitive market, it has become a popular sales technique in B2B settings. Guided Selling enables sales reps to gain an advantage by having extensive knowledge of customer preferences and predicting their future purchases. This approach gives sales reps better visibility into their pipelines and more control over their sales process, resulting in statistically relevant recommendations to guide reps to win deals.

According to Aberdeen Group, Guided Selling can boost sales conversions by up to 20%, improving customer retention. This selling approach benefits all sales reps. From data-driven sales reps to those who prefer to wing it, brand-new sales reps, and even burned-out sales reps. It helps them be better prepared and informed, boosting their productivity and performance.

Did you know?

Gartner predicts that by 2025, 75% of B2B sales organisations will augment traditional sales playbooks with AI-guided selling solutions.





How Guided Selling differs from Traditional Selling

Customer Insight

The shift to digital has been inevitable. AI-powered selling paves the way for B2B sales organisations to adapt to changing customer behavior and seize new opportunities. In the past, the selling process was all about convincing the customer to buy a product. There was a limited amount of data involved in the decision-making process. If there was, it was manually analysed, often through spreadsheets prone to errors. This led salespeople to have a challenging time collaborating with their team and sharing information. However, things have changed, especially with how customers make purchasing decisions.

Personalisation

Customers are more tech-savvy than ever. In a 2023 survey, conversational-AI software vendor, Nuance, found that 67% of customers prefer self-service over speaking with a rep. This statistic helps to explain why, if a rep gets through to them, customers now expect clear, concise recommendations tailored to their needs. They also desire a more personalised experience and less frequent but consistent engagement from sales reps. Digital sales channels allow sales reps to provide what today's customers want, backed by data and insights.

Sales Tech Evolution

Technology has enabled sales teams to avoid using static spreadsheets and manually consolidating data. Instead, they can fully embrace intuitive tools such as sales intelligence software

designed to simplify a salesperson’s job. This software, powered by Machine Learning (ML), can extract data from ERP and CRM, integrate it into a system, and analyse it. It enables salespeople to focus on what they do best: sell. Now augmented by AI, sales intelligence software has the capability to support salespeople with guided selling and bring value to every interaction.

From traditional to guided selling.

Aspect	Traditional Selling	Guided Selling
Data Analysis	Manual spreadsheets, error-prone	Automated consolidation, actionable customer insights
Sales Process	Pitch-focused, limited personalisation, high-pressure tactics	Conversation guided by data-driven recommendations, consultative approach
Team Collaboration	Limited collaboration between sales reps	Increased collaboration through shared customer insights
Customer Nurture	Inconsistent engagement due to a lack of prompts and reminders	Precise engagement enabled by conversation prompts

“Guided Selling can boost sales conversions by up to 20%.”

(Source: Aberdeen Group)



Why Salespeople Adopt Guided Selling?

Shift in Behavior

As we pointed out, B2B customers are rewriting the rules for sales everywhere. The business landscape has seen significant changes in the past few years, including the transition towards digital channels accelerated by the pandemic. As B2B buyers become more connected and self-sufficient, they take more control of their purchasing decisions like never before. They research, create product lists, and set their requirements before engaging with sales reps.

Digital Disruption

Because we find ourselves in the digital age, we must follow the current market trend, where Millennials dominate the workforce. According to Demand Gen Report “The B2B Millennial Survey Report”, 33% of Millennials influence B2B decisions, with 44% making the final call. They are key revenue drivers, but their unique traits shape their purchase preferences – think shorter attention spans and an abundance of information at their fingertips. To succeed, sales teams must keep adapting.

Sales Productivity

Enter Guided Selling – the game-changer. It equips salespeople with the guidance they need to appeal to digital natives i.e.: Millennials. Guided Selling identifies patterns, predicts trends, and offers tailored guidance, leading conversations from A to B – the sale. It is essential to clarify that Guided Selling is not a substitute for sales reps. Instead, it complements their work by providing data-driven insights rooted in the customer’s buying history.

Three Ways Guided Selling Helps Sales Teams Achieve B2B Sales Success

1: Invaluable conversations with prospects

Have a Purpose Behind the Conversations

By utilising AI, guided selling is able to extract the purpose behind prospect conversations and better understand their unique needs and pain points. With the help of predictive analytics and a vast amount of data, sales teams are able to gain valuable insights into each potential customer's specific needs and challenges.

Equipped with this knowledge, salespeople can lead discussions with greater clarity and relevance, ensuring that every interaction is purpose-driven and tailored to meet the prospect's requirements.

Nurture Relationships

Guided selling is more than just making a sale. It involves cultivating lasting relationships by predicting the needs of potential customers and tailoring the customer experience to their preferences.

Through guided selling, sales professionals can become trusted advisors and offer solutions that genuinely address the challenges faced by prospects. This fosters a sense of partnership and trust that extends beyond a single transaction. Gartner research suggests that by 2025, an exponential rise in digital interactions between buyers and suppliers will break traditional sales models.



Optimise Sales Cycles

When it comes to B2B sales, long sales cycles can often pose as a major challenge. However, guided selling offers a different approach. Rather than just trying to sell a product, it encourages sales teams to delve deeper into the potential customer’s issues. By focusing on selling solutions rather than products, guided selling speeds up the decision-making process. It ensures that the sales pitch is aligned with the prospect’s pain points, clearly understanding their challenges and presenting a compelling resolution.

Use Case: Amplify Sales Conversations

Imagine a scenario where two sales teams had difficulty with sales interactions. One team adopted guided selling, while the other did not.

Aspect	With Guided Selling	Without Guided Selling
Understanding Prospect’s Preferences	Understands prospect’s preferences and challenges thoroughly	Using identical pitches for all prospects regardless of individual differences
Approach Preparation	Prepared with personalised approach	Unprepared to sales calls and meetings, lacking individualised strategies
Sales Tool Utilisation	Uses guided questionnaires and tools to show return-on-investment using their information	Lacks access to sales intelligence tool
Handling Sales Objections	Well-prepared for any sales objection with data-driven insights	Handles objections with limited insights



2: Reactive to proactive sales strategy

Reactive vs Proactive

Before guided selling, B2B sales teams would react to customer demands and market changes as they happened. Nowadays, successful sales teams have adopted a proactive strategy by anticipating market trends and customer needs before they arise. This approach enables salespeople to take advantage of opportunities rather than just reacting.

Predictive Analytics

Sales teams can use guided selling with predictive analytics to access accurate sales forecasts on multiple fronts. These forecasts include customer behavior analysis, product performance predictions, and revenue projections. This predictive insight enables sales professionals to customise their strategies, allocate resources effectively, and make data-driven decisions to optimise sales outcomes. Predictive analytics can help sales organisations stay ahead of market trends, improve their competitive edge, and promote long-term growth.

 **Research indicates that companies that invest in AI are seeing a sales ROI uplift of 10 to 20%.** 

(Source: McKinsey)



Win Every Sales Scenario

Being prepared is crucial for a proactive sales strategy. Guided selling helps sales teams to anticipate any sales scenario in advance.

This preparedness improves their flexibility and distinguishes them from competitors who may still rely on reactive methods. By analysing retrospective data and identifying patterns, sales teams can anticipate future trends and adjust their strategies, accordingly, positioning themselves ahead of the curve.

Use Case: Take a Proactive Approach

Let's examine the effects of guided selling on sales teams that adopt a proactive strategy compared to those that remain reactive during a seasonal trend causing a decline in a specific product sale.

Aspect	With Guided Selling	Without Guided Selling
Anticipating Seasonal Trends	Anticipates seasonal trends and prepares in advance, using predictive analytics	Lacks predictive analytics, resulting in lack of awareness of seasonal decline
Proactive Strategy	Proactively adjusts sales tactics based on anticipated trends	Struggles to react and adapt to changing market conditions
Revenue Impact	Easily transitions with minimal impact on revenue due to preparedness	May face unexpected disruptions and revenue losses
Adapting to Market Changes	Easily adapts to market changes in the future and maintains business stability	Faces market adaptation issues that potentially impact business stability

3: Data-driven up-selling & cross-selling

Tech stack enhancement

Utilising guided selling is beneficial and essential for elevating your sales team's tech stack. Its seamless integration with your current systems streamlines sales processes and improves overall efficiency. With its predictive sales playbook, raw data is transformed into actionable insights, arming your team with the information required to make data-driven decisions and close more deals.

Turn Data into Insights

Extracting vital information from your databases offers sales teams a clear and comprehensive understanding of each customer's journey. These insights go beyond transactional data, including retrospective purchasing patterns, seasonal trends, and product preferences. This deeper knowledge empowers salespeople to tailor their outreach, anticipate customer needs, and forge more meaningful connections, ultimately resulting in increased customer satisfaction and higher sales conversions.

Spot tailored opportunities

With guided selling sales teams fully utilise their tech infrastructure, giving them a better understanding of their customer buying behavior. Unlike generic recommendations, sales teams can provide customers with specific information about what they may need and why. It uses these data-driven insights to identify personalised up-selling and cross-selling opportunities. Without it, offering products randomly may result in missing out on significant revenue. Guided selling identifies opportunities precisely, ensuring recommendations align with customer preferences.

“As guided selling enters a new AI-driven era, sales leaders have a career-defining opportunity to rethink standard practices to push teams forward to be their best.”

(Source: Forbes)



Use Case: Identify Up-sell and Cross-sell Opportunities

Here is a scenario: a sales team that has adopted guided selling is more efficient than a sales team that has not yet deployed it.

Aspect	With Guided Selling	Without Guided Selling
Data Utilisation	Uses CRM/ERP data to provide personalised recommendations, increasing chances of successful up-sells and cross-sells	Lacks access to detailed customer insights, resulting in generic recommendations
Customer Satisfaction	Enhances customer satisfaction by taking a personalised approach backed by AI-powered insights	Low customer satisfaction due to less relevant product recommendation
Revenue Generation	Increased revenue generated due to successful up-selling and cross-selling	Misses out on potential revenue by not addressing customer preferences
Efficiency	Works efficiently by focusing on high-potential leads and opportunities	Spends more time with unproductive leads

“Companies that employ guided selling techniques have reported a 15-20% increase in cross-selling and upselling opportunities.”

(Source: BigCommerce)

Conclusion

Sales teams need to embrace data-driven guided selling fully. In today's digital world, adopting AI and predictive analytics is no longer a choice but necessary for sales success. Guided selling offers a personalised and consultative approach that sets teams apart. It transforms sales representatives into trusted advisors who can anticipate customer needs before they arise. Guided selling fosters lasting relationships built on understanding by using data to have meaningful conversations backed by data insights. The statistics demonstrate that guided selling increases productivity, accelerates sales cycles, and boosts revenue. To stay competitive, sales teams must evolve and adopt guided selling to witness their success soar.





About sales-i

We are the world leader in sales performance for distributors and wholesalers.

sales-i is designed to make every sales call more personal and profitable. sales-i enables sales professionals to clearly identify and target high-quality sales opportunities within their current customer base. Equipped with customer buying behavior alerts, salespeople can make insightful, personalised, quick business decisions, realising repeat sales, reduced customer attrition and maximised profit margins as a result. sales-i will change the way you sell. Get in touch for a free, online demonstration and judge our software for yourself.

To find out more, visit www.sales-i.com.

About SugarCRM

The world's most loved CRM Platform.

SugarCRM is a CRM software that helps marketing, sales, and service teams reach peak efficiency through better automation, data, and intelligence so they can achieve a real-time, reliable view of each customer. Sugar's platform provides leading technology in the sales automation, marketing automation, and customer service fields with one goal in mind: to make the hard things easier. Thousands of companies in over 120 countries rely on Sugar by letting the platform do the work. Headquartered in the San Francisco Bay Area, Sugar is backed by Accel-KKR.

For more information about SugarCRM, visit www.sugarcrm.com.

