



# The 360 Sales Leader Playbook:

Running Sales Like a CEO



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## Running Sales Like a CEO

As a sales leader, it's your responsibility to bridge the gap between the sales team and the rest of your organization. Each department has benefits to offer your team that can enhance your sales effectiveness and improve results if given the chance.

Rather than a narrow focus on your team's performance as a standalone department, 360 sales leaders should broaden their field of vision and consider how to optimize the role of sales within their organization as a whole. A well-rounded approach to sales encourages valuable interdepartmental collaboration — and boosts your team's performance as a result.

### What You'll See Ahead:

- What is a 360 sales leader?
- Interdepartmental collaboration: assembling your resources
- Essential strategies for 360 sales leaders
- Creating a 360 sales process
- Managing your sales funnel
- Essential tools for the 360 sales team
- Selecting the right key performance indicators for your team

### What Is a 360 Sales Leader?

The hallmark of a 360 sales leader is their ability to recognize and collaborate with every department that influences sales — both directly and indirectly.

Following this sales leadership model allows you to run your team like a CEO runs a company. You can set clear goals, processes, and strategies using all the available resources and information at your disposal.

### By implementing a 360 approach, you can help drive:

- Greater revenue
- Improved interdepartmental cooperation
- Enhanced organizational alignment
- Reduced stress on sales
- Refined communication

**Insider Tip:** Set yourself up for success

As a 360 sales leader, use a dashboard to track your team's performance and generate actionable insights for potential strategic updates.

# Interdepartmental Collaboration:

## Assembling Your Resources

As you shift to a more collaborative sales process, familiarize yourself with the unique resources each department offers and use their expertise to optimize sales. Follow along to discover how these departments can interact with, empower, and benefit from your sales team.

### Marketing

The division between sales and marketing is one of the most common dilemmas for sales leaders. In fact, **LinkedIn** found that 96% of sales and marketing leaders face challenges with strategy alignment, 97% experience misalignment in processes, and 96% have trouble aligning on content and messaging. However, 85% of these leaders also believe that finding alignment is their organization's largest opportunity for business growth. Marketing and sales often have the same mission: to acquire customers and make a sale.

While your sales team focuses on selling directly to buyers, marketing creates experiences at scale. Because of their differing tactics, many sales leaders struggle to operate in tandem with marketing. Sales and marketing may disagree on who leads are attributed to, what defines a qualified lead, and what strategies are best for closing a deal.

To break through this misalignment, you must encourage collaboration with marketing — ensuring both teams share valuable information that can improve your overall performance. This requires teams to practice transparency, clear communication, and teamwork when it comes to bringing in potential buyers.

### By achieving alignment your teams can:

- Increase the effectiveness of your marketing materials by enabling your sales team to share real-time feedback
- Enhance your **content strategy** by informing marketing about the specific content needs of prospects at different stages of the buying journey
- Boost the top-end performance of your sales funnel
- Improve **lead qualification** so your team can prioritize warmer prospects
- Ensure your prospects regularly engage with your brand through both 1x1 sales conversations and scaled marketing outreach
- Increase conversion rates by sales/marketing collaboration on strategies like lead nurturing and **account-based marketing** (ABM)



According to a Hubspot report, **32%** of sales and marketing leaders found revenue growth to be the most significant benefit of sales and marketing alignment, while **26%** noted an increase in lead quality — making this interdepartmental connection a top priority for your business.

# Presales

Your sales team may be the best in the business, but they don't have time to perform every part of the sales process effectively. Important research and qualification at the beginning of the process can be a misuse of your

That's why presales and sales work hand-in-hand. From discovery and prospecting to qualification and demos, presales can help set up your sales team for success.

## As a 360 sales leader

It's important to recognize the value of presales and nurture this relationship. Working alongside presales as a single, cohesive team allows both teams to thrive and improves the quality of your incoming leads.

## To best nurture this relationship

Set up weekly or monthly meetings with presales to go over processes, potential roadblocks, target audience, and areas for improvement. Your presales department will have valuable insights into the behaviors and needs of your buyers that they can pass onto your sales reps and improve their chances of sealing the deal.

## Prepare

Make sure your presales department has the tools they need to gather this information as well. Providing them with the right sales enablement solutions will not only increase their effectiveness, but their value to your organization as a whole.

## Insider Tip:

Investing in presales empowerment reduces the stress and work required for your sales team down the line. Solutions like **demo automation** transform your presales team into value-drivers for your sales process by boosting buyer enablement, pre-qualifying leads, and reducing your sales cycle by up to 30%.

# Sales Operations

Modern sales leaders must think beyond their own team to achieve true sales optimization.

Although your team may have generated their own methods of selling through years of experience, some traditional strategies are becoming obsolete due to the rise of digital selling solutions like demo automation. That's why it's important to communicate the utility of working with sales operations to your team members.

**In an age where technology is king, sales operations has never been a more valuable department for your team. This department supplies your team with the latest in:**

- Sales optimization methodologies to improve the efficiency and effectiveness of your sales processes
- Technical expertise to help your sales team navigate complex tools and systems like CRM and automation software
- Data analysis so you can make data-driven decisions, identify trends, and adjust strategies in real-time

These resources help your team operate at the highest efficiency. As a 360 sales leader, you must encourage your team to use the insights and tools provided by sales operations to their fullest potential. Leveraging these insights across your sales process will accelerate your results and streamline your workflow.





# Customer Support

Nurturing buyer partnerships is essential to securing future business through contract renewals and upsell opportunities. However, your sales team may not have the time to spend on contacting closed customers — or may not consider it a priority. That's why maintaining a close relationship with your customer support department is so beneficial.

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Your brand's relationship with buyers doesn't end after the sale is closed, and when buyers call in with questions or concerns, it's likely they will interact with your customer support department instead of sales. That makes it imperative that this department be well-versed in your product and sales tactics.



Collaborating with customer support allows your team to identify upsell and cross-sell opportunities. Additionally, customer support can help identify new potential pain points that come up post-sale, helping your sales team nurture your buyer relationships through multiple channels.

# Product

Not every member of your sales team can be a subject matter expert on your product.

They likely won't have insights into the inner workings of your product development, updates, and nuances. However, your product team can provide all this information and more to arm your team with the details they need to engage with and influence your buyers. The more knowledgeable your team members are about your product, the more likely they are to make a sale. This means the product team is an essential asset to your 360 sales strategy.

Your product team will also have a clear picture of your product roadmap, understanding the progress and possibilities of future product updates. Using this roadmap, your sales team can keep customers interested in what's to come and set up potential upsell opportunities well in advance.



## Platform Overview

In this demo, I'm happy to walk you through the basic capabilities of our platform. Let's get started.

Next →

3 of 7

# Finance

As a sales leader, one of your challenges is to increase revenue while reducing costs. But you and your team likely don't have the time or expertise to calculate the figures necessary to achieve these goals.



Luckily, this objective aligns with your finance department, which means they'll have a helpful perspective on how to cut costs without reducing effectiveness. Finance plays a critical role in developing your sales forecast, which acts as a blueprint for your annual sales growth. Acting as your partner in planning, finance will offer data-backed direction into KPIs and available resources — increasing your overall credibility when it comes time for approval.



Using insights from finance, you can also get an accurate picture of how efficiently your team is operating and set realistic performance goals based on firm financial information. As your team works through their strategy, finance can provide input into how effectively your team is reaching set goals and offer advice on areas for improvement.



# Essential Strategies for 360 Sales Leaders

Once you understand why it's beneficial to collaborate with other departments, you need to build an approach that extracts the most value from your 360 sales process. Use these strategies to lay the groundwork for a process which aligns your revenue drivers and promotes sales optimization.

## 1 Set Interdepartmental Goals

To foster alignment among your revenue-driving departments, you need to set company objectives and key results (OKRs). Setting OKRs encourages your sales team to work closely with other departments — driving enthusiasm and communication across your organization. Creating these goals as a 360 sales leader starts by aligning with other departmental leads and finance to form an understanding of your organization's needs. Identifying the KPIs of each department will help your leadership team find cross-functional objectives that can be used company-wide and establish desired outcomes. When departments work together to achieve these goals, they increase overall efficiency and create a more cohesive organization.

## 2 Create Cross-Functional Sales Teams

The best way to meet interdepartmental goals is to form interdepartmental teams. Connect key stakeholders from revenue-driving departments in a single, formalized team so your sales representatives can see the sales process from different perspectives — and gain innovative new ideas on how to improve it. Fostering this collaboration will also allow your sales team to educate other departments on your sales process so they can better align to drive revenue.

## 3 Use Collaborative Sales Enablement Software to Boost Efficiency

Not every stakeholder has the time to jump into meetings and discuss sales in person. That's why collaborative sales enablement software is central to building a 360 approach. Having a digital space where each department can share information with sales, provide feedback, and offer assistance allows your teams to work together at maximum efficiency — without the roadblocks of outdated communication methods.

### Insider Tip:

Consensus has collaborative digital sales tools to connect, empower, and inform your key stakeholders in **sales**, **presales**, **marketing**, and more.

## 4 Establish Interdepartmental Feedback Loops

Information is power when building a winning sales process. While your team may have blindspots for what's working and what's not, other departments can identify opportunities for improvement using speciality knowledge. Likewise, your sales team can do the same for other departments.

For example, product may be excited about a new feature they want to push, but sales and marketing may discover the target audience isn't as interested in this feature as projected. Alternatively, sales operations and finance might point out whether there are more efficient ways for your sales team to produce the same or better results by altering their strategies.

To gather honest feedback from each of your partner departments, consider using tactics such as:

- Surveys
- Focus groups
- One-on-one meetings with department managers
- Anonymous questionnaires or suggestion forms

By offering your teams the opportunity to comment, question, and suggest ways to improve, you can create a more collaborative work environment and crowdsource solutions to potentially unnoticed problems.



# Creating a 360 Sales Process

Each step of your sales process should promote collaboration and empower your team through the resources provided by other departments. Think of the value each step has to offer and where your internal partners can boost effectiveness to promote sales optimization and efficiency.

## 1. Establish Product Knowledge

When onboarding new employees or continuing education with your current team, product knowledge should be your top priority. By partnering with your product team during these training sessions, your sales representatives can gain a deeper understanding of your product's value and how to communicate that information to your customers. In fact, selling as a team can lead to a **258% higher likelihood** of closing than independent sales.

Empowering your sales team with a higher level of product knowledge also allows you to pivot into trending sales strategies such as value-based selling. This methodology centers on communicating unique value to your buyers. Having a depth of product expertise helps your team communicate beyond just features — instead selling a personalized solution to customers.



## 2. Research, Prospect, and Qualify


























In the beginning stages of the sales cycle, marketing and presales are your team's best friends. But working together and working effectively to achieve your research, prospecting, and qualifying goals are not always one in the same.




Working effectively with marketing during the beginning stages of the sales process can increase the value of marketing qualified leads (MQLs). But to do this, you need to consider what steps are necessary to take as a sales leader, such as:

- Setting up regular joint meetings to ensure messaging alignment between marketing and sales
- Generating buyer personas together to create a unified targeting strategy
- Coming up with agreed-upon qualification parameters for leads
- Determining a seamless handoff strategy for MQLs to sales

Then, you'll need to devise a strategy to generate the most value out of your relationship with presales. Presales lays the groundwork for your sales team, so knowing how to work together is essential for optimizing both teams' value. Consider tactics such as:

- Creating a cohesive work process through sales enablement software like demo automation
- Training sales and presales teams together to create a cohesive understanding of goals, strategy, and messaging
- Enacting joint KPIs that encourage collaboration and elevate teamwork
- Emphasizing the importance of presales to your sales team to foster mutual respect and appreciation

Name / Title	Invited by / Invite date	Topic 1	Topic 2	Topic 3	Topic 4
 <b>Chris Thomas</b> Sr. SE Manager	<b>Jana Lee</b> 02/08/2024				
 <b>Jana Lee</b> Dir. Sales Eng.	<b>Sales Rep</b> 01/010/2024				
 <b>John Maxwell</b> SE Manager	<b>Jana Lee</b> 12/19/2023				
 <b>Kelly Tapscott</b> VP Solution Cons.	<b>Jana Lee</b> 03/15/2024				
 <b>Patrick Gray</b> Sr. Dir. Sales Eng.	<b>Jana Lee</b> 02/11/2024				

 Very important
  Somewhat important
  Not important

Presales is an essential partner in the 360 sales process. Using these tactics can ensure your team is in close contact with presales, collaborating with them to access a wealth of high-value information that will increase your chances of winning.

### Insider Tip:

Gain valuable insight into the behaviors, preferences, and status of your buyer group by using **demo analytics** to sort and prioritize key stakeholders. These analytics will help your team identify internal champions who can make your case in the boardroom.



### 3. Align on Goals for Prospect Accounts

When onboarding new employees or continuing education with your current team, product knowledge should be your top priority. By partnering with your product team during these training sessions, your sales representatives can gain a deeper understanding of your product's value and how to communicate that information to your customers. In fact, selling as a team can lead to a 258% higher likelihood of closing than independent sales.

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To maximize the value of interdepartmental collaboration with ABM, you should implement a few key tactics:

- Work with sales operations to optimize sales processes and identify important customer data.
- Use presales insights to create comprehensive account profiles with research-based needs.
- Build a cohesive engagement strategy with marketing to reduce friction during handoff and enhance buyer interactions.
- Identify top product recommendations, upsell opportunities, and relevant features based on each account's needs with the help of the product department.

By leveraging this information, your team can boost their odds of closing, increase potential deal size, and improve overall buyer experience by maximizing personalization.



#### 4. Address Customer Concerns

As your buyers move through the sales process and down the sales funnel, they will have some questions about your product.

- What are some of your product's top features?
- How does your product fit our needs?
- Why is your product better than the competition?
- How much does your product cost?
- Does your product integrate with my other solutions?
- What is my return on investment?

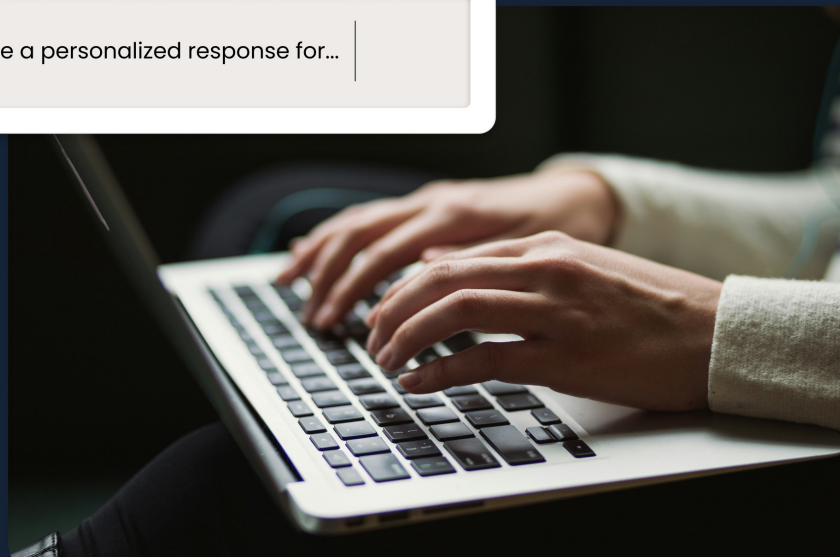
With guidance from your product team, along with help from marketing and customer support, your sales team can efficiently address these inquiries and keep buyers moving forward. Marketing can provide materials to keep buyers engaged, while customer support can assist by sharing success stories from similar accounts to put your prospect's mind at ease. Your product team can offer direct answers to complex questions that your salespeople may not already know, ensuring accurate and timely responses.

How can I help you today?

Generate a personalized response for...

#### Insider Tip:

Streamline your responses to customer questions and reduce the burden on your sales team by integrating **AI** into your buyer experience. AI can quickly and accurately answer buyer questions by learning from your internal product data.



## 5. Nurture Your Relationships

Once a sale has been closed, customer support will become your sales team's greatest ally. They will provide post-sale assistance by:

- Collaborating with sales on a seamless onboarding process for the new client
- Solving customer issues and answering any questions they have
- Identifying upsell and cross-selling opportunities
- Monitoring the health and utilization of new client accounts to escalate any potential problems early on

But nurturing relationships goes beyond just customer support. Your sales team must also stay engaged with buyers to build out long-term relationships — especially with high-value enterprise clients. Encourage your team to try these tactics and coach them to improve their results:

- **Be proactive:** Your team needs to know your buyers' needs before they meet to establish credibility and increase efficiency. Encourage your team to prioritize research — teaming up with presales and using discovery solutions like Consensus.
- **Establish personal connections:** Trust is key in buyer relationships, especially when dealing with enterprise clients. In fact, establishing internal champions can increase your potential **win rate by 114%**. Show your team how to build these connections by creating a plan for social engagement, practicing small talk, and scheduling client follow-ups.
- **Engage in social listening:** What your clients are saying about you online can be your team's greatest asset or detractor. Educate your team members on how to perform social listening and build a plan for how to respond, gather data, and make adjustments to improve buyer relationships.
- **Create feedback loops:** Showing your buyers your team is open to feedback creates trust and allows you to get suggestions for improvements straight from the source. Have your team create surveys, feedback forms, and more to give your buyers the opportunity to contribute their opinions.
- **Show, don't tell: 95% of B2B** buyers are the users of the tools they purchase. That's why you need to arm your team with the tools they need to show buyers the value of your product rather than list off features during a sales call — such as sandbox environments, ROI calculators, and **interactive video demos**.

Once your sales team has established these relationships, they can partner with other departments to boost the value of these connections. Through materials from marketing and data from customer support, your sales team can facilitate research-backed nurturing and retain or expand the value of your customer base.

# Managing Your Sales Funnel

Part of being a well-rounded sales leader is staying in tune with the state of your sales funnel. Your sales funnel is an essential element of your strategy's success and can help you identify potential issues.

As buyers move down the funnel, the quality of those that remain (as well as the number of those lost) indicates how well your sales process is working. However, it can also point out opportunities for collaboration or improvement in other departments.

If you are losing an unexpected amount of leads during certain stages of your sales funnel, you may consider collaborating with other teams to find a solution. As an example, if you're losing a higher number of leads than expected at the top of your funnel, your marketing team may be communicating a message that doesn't align with your sales strategy. If you're seeing a higher dropoff toward the bottom of the funnel, it might help to collaborate with the product team to ensure closing technical questions around capabilities and integrations are answered efficiently and consistently.

Finding opportunities to improve your sales funnel with help from other teams can reduce your sales funnel loss rate and better facilitate your customer journey from attention to action.



## Insider Tip:

Do you have a leaky sales funnel? Identify common issues and take the steps to fix your broken sales funnel to avoid negative impacts to your bottom line.

# Essential Tools for the 360 Sales Team

To more effectively execute cross-departmental empowerment, your team needs digital solutions designed for collaboration. Although your team's requirements may vary based on your existing tech stack, sales process, and comfort level, these are a few of the top solutions 360 sales leaders are using to optimize their sales cycle.

- CRM solutions
- Marketing automation solutions
- ABM platforms
- Sales engagement platforms for automating and enabling personalized outreach
- Sales intelligence tools that provide data on customers and prospects
- **Demo automation and AI enabled demos**
- **Demo analytics software**
- **Interactive video demos**
- E-signature and document tracking
- Revenue intelligence software to analyze sales conversations
- Helpdesk chat solutions
- **Customer success solutions**



## Insider Tip:

When choosing digital solutions for your organization, consider how well each solution integrates with the rest of your tech stack. Solutions with diverse **integrations** will keep your process running smoothly and reduce the need for manual data entry.

### Selecting the Right Key Performance Indicators for Your Team

To demonstrate your 360 sales strategy's success, you'll need to present clear evidence of your team's improved performance. While you may be used to using sales-oriented (KPIs, such as quotas, total revenue, and revenue per deal, a 360 approach to sales requires a wider lens. To measure your performance, consider some of these metrics, which offer a closer look at the impact of your internal changes and overall collaboration:

- **Customer Lifetime Value:** CLV, while a common metric in sales, can also measure how well you're utilizing your cross-departmental resources. Higher lifetime value can indicate well-communicated product value, powerful marketing, well-qualified leads, effective sales methods, and valuable customer support sales opportunities.
- **Conversion Rate:** As with any sales process, you need to know how effectively your team is closing. Adding other departments into your team allows you to measure the effectiveness of your new strategy and compare it to your previous results.
- **Average Conversion Time:** With the help of other departments, you should be able to accelerate your sales cycle and shorten your average conversion time.
- **Customer Retention/Churn Rate:** This metric shows how effectively your sales and customer support teams are working together to retain customers post-sale.
- **Employee Retention:** Use this metric to highlight potential internal issues within your 360 sales process that you can update to reduce employee turnover.
- **Internal Feedback:** Whether good or bad, this KPI is essential to finding out your teams' perspectives on what works and what doesn't. Feedback from other departments can also provide new solutions to common sales problems.

Once you've established your KPIs, adding daily stand-ups to your workflow can help you check in on the status of your team. In these meetings you can monitor KPI progress, assist those who are struggling, and arm sellers with the info they need to overachieve on their goals.



#### Insider Tip:

When implementing these KPIs, think addition rather than substitution. Maintaining your existing sales metrics is still important for measuring your individual team's performance.



# Build Your 360 Strategy With Consensus

As you build out your 360 sales strategy, equip your team with the right tools for success. Sales leaders trust Consensus to deliver the tailored, product-led buying experience buyers want, while empowering your teams to be more effective.

Learn how Consensus empowers your sales team to exceed their targets while delivering a **seamless buyer experience**.

