The Sales Leader’s Guide To Productive Digital And Virtual Selling
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The events of 2020 marked a seismic shift for B2B sellers. Sales organizations were forced to adapt to new ways of working, meeting, and selling, seemingly overnight. Yet as abrupt as it was, this shift was accelerating a trend already in motion. Digital and virtual selling are here to stay — and those who master its tactics and tools will win.

This guide will equip you to coach your sales reps to thrive in a digitally driven virtual environment. Identify high-potential opportunities online, harness insights from digital interactions, and effectively engage with prospects using virtual tools. You will also learn how to align more closely with marketing and sales operations leaders to accelerate sales results.

Succeeding in sales’ next “normal” will take a sustained, all-hands effort. The tactics and tools covered in this guide will help to ensure your entire team is prepared to contribute.
The Empowered B2B Buyer

Today’s B2B buyers are firmly in control of their purchasing journey. Increased access to critical information such as pricing, performance, and perceived value has made buyers less reliant on sellers as they make decisions about the products and services they need. Adapting to this shift requires sellers to adopt new mindsets and skills. Look beyond buyers who have actively expressed their willingness to engage; be prepared to act on signals that surface on review forums, social media, and elsewhere online.

Forrester’s research shows that B2B buyers may require more than two dozen interactions (both human and non-human) throughout their buyer’s journey to complete a purchase. To engage prospective buyers and close deals, sellers rely on a curated mix of digital assets and increasingly virtual face-to-face interactions. Buyers have come to expect the swift, seamless, and intuitive experiences they receive as consumers, so sellers must be prepared to surface the right information at the right time.

Digital and virtual approaches require sellers to tweak their usual practices to achieve optimal effects. They also require the right technologies to support interactions at scale. In the following sections, we’ll explore which tactics, tools, and approaches are most effective for achieving specific objectives.

This guide focuses on two types of digital interaction:

- **Digital information exchanges:** asynchronous or self-service interactions that occur through email, social media, and the provider’s website. Examples include downloading reports, watching videos, and exploring online demos.

- **Virtual exchanges:** buyer-seller interactions that take place via phone, video, web conferencing, or chat, as well as webinars and virtual events.
Harness Insights From Digital Touches

At the early (education) phase of their purchasing journeys, buyers’ interactions with a company are more likely to be self-guided (56%) than human-based (44%), Forrester’s 2021 B2B Buying Survey shows. This may appear to put sellers at a disadvantage, but in fact, it does the opposite. Buyers conducting online research provide better signals than reps may gather through direct interaction alone. Sales organizations that can translate these signals into recommended next actions can gain a clear edge.

Work with sales operations leaders to enable this capability by taking these steps:

1. **Monitor intent data**
   Intent data comes in many forms and from many places including form fills and historical sales data as well as third-party data publisher networks and review sites. Intent data is most valuable when points are aggregated and linked to accounts, contacts, and opportunities; without these links, key indicators that validate intent may be missed.

2. **Plan to use buying signals to gauge opportunity**
   Ask sales operations to organize the data into buying signals that help reps more effectively qualify opportunities. For example, three contacts from the same account downloading an e-book on the same product may indicate a propensity to purchase, based on historical data. Work with marketing to ensure that any opportunities that are not yet ready for direct sales interaction are provided with additional marketing engagement to further qualify the opportunity.

3. **Establish recommended next steps**
   Identify what has worked in the past to engage the buyer, and use this history to establish recommended next actions for reps. For example, data might show that when prospects have downloaded an e-book, offering a demo has been the most effective way to progress the opportunity. Ultimately, the next-step decision should rest with reps. Require reps to log their actions to build an understanding of what does and doesn’t work. The next time there is a similar deal, the rep will benefit from this data.

Using these steps, sales organizations can become more adept at harnessing value from digital interactions. This is particularly critical when buyers’ earliest interactions may be invisible to reps.
Build Credibility Through Social Media

Social media platforms can be valuable for helping sales reps identify opportunities. Most of your sales reps likely already use social media in their sales efforts, but it’s important to ensure they’re using these tools as effectively as possible.

Sellers should spend time on the platforms their prospects are most likely to use. If your reps aren’t sure what these are, work with marketing to gain these insights. Encourage sellers to join or follow relevant groups, channels, or hashtags, and to explore advanced features (e.g., advanced search filters) that can help them home in on promising prospects. Sellers should also fine-tune their social profiles for audience-centricity. For example, lead with a message about client value rather than using self-promotional language.

Following conversations through groups or hashtags can help sales reps uncover trends, needs, and pain points — which can, in turn, point them toward the right content to post. Along with sharing relevant original content (typically provided by marketing), sellers should comment on and share others’ posts to strengthen engagement and build influence.

The insights reps gain through social media can inform their real-time interactions with buyers. Yet this should be approached judiciously. Knowing too much about a prospect can give an unfavorable impression, so advise sellers to address trends or concerns more broadly. (For example: “For many companies in your industry, security is a top-of-mind issue. Is that the case at your company?”)

Drive continuous improvement by encouraging sellers to share messages, tactics, and assets that have worked well on social media for their peers. Ask sales reps to share these insights with marketing, as they may be helpful in creating new content.

Social platforms should not be used for overt selling. Sellers should use these platforms primarily to better understand prospects and build credibility.
Craft Compelling Messages

Regardless of how sellers find prospects, the ability to build a rapport through messaging is critical. Effective messages entice the prospect to learn more and open a dialogue; they are not intended to close a sale on their own.

Teach sellers to develop messages that elicit a response. Messages should be buyer-centric, reflecting knowledge of the buyer’s role and needs. They should tell a brief, clear story that engages the recipient and conclude with a call to action.

Follow-up emails should confirm previous conversations, provide any information or assets promised, and progress naturally to the next topic. By combining email outreach with ongoing social media engagement, sellers continue building influence with buyers and moving prospects toward purchase.

Have sellers practice creating a variety of messages, sharing and critiquing them, and identifying best practices. Gather examples of messages that have driven effective outcomes. Partner with marketing to test messages for relevance and effectiveness and ensure alignment. Sellers’ messages should build on any dialogues that marketing campaigns have started with prospects and follow the standard buyer decision-making path (i.e., education, solution, selection).

Encourage sellers to think of their interactions with prospects and customers as one long dialogue, not a series of disjointed outreaches.
Master Virtual Engagement

As they continue their dialogues with buyers, sellers are likely to use virtual communications platforms for some interactions. Many B2B buyers prefer virtual engagement because of its convenience, so sellers must continue honing their approaches to being brief and focused, yet personable, on these platforms.

Encourage practice through role-plays to build confidence, and continue to use virtual platforms for internal meetings and training. The time invested in building virtual interaction skills pays off by enhancing sellers’ effectiveness and potentially increasing the number of buyer meetings completed per week.

The following virtual meeting best practices can serve as good reminders for your team:

- **Understand tools’ full capabilities.** Encourage reps to go beyond simple video and audio interaction and make full use of interactive features (e.g., whiteboarding, advanced screen-share capabilities). Most web conferencing platforms provide training videos and documentation on how to make the most of their features.

- **Minimize distractions.** Before each meeting with a customer or prospect, sellers should free their environment of potential distractions — e.g., silence phones and close notifications and unneeded browser windows. Reps should use video whenever possible, ensuring that the background is professional, and all secondary noise is minimized.

- **Customize materials.** Encourage sellers to remove excess words and animation from their presentations and keep the material focused on key points of interest or buyer needs. Fonts and any visuals should be adjusted for the virtual platform, and presentation talk tracks should tell a clear, succinct story.

- **Engage thoughtfully.** Advise reps to speak more slowly, pause more often, and look for opportunities to solicit interaction. Picking up on interpersonal cues can be challenging in a virtual environment, so sellers should listen carefully to attendees and probe for clarification or additional information as appropriate.

- **Practice.** Have sellers practice their delivery to make it crisp, walking through the visuals and talk track and identifying opportunities to engage buyers during the presentation. Sales leaders can help reps by conducting practice sessions for different types of virtual meeting (e.g., prospecting, discovery, sales demos, negotiation, objection handling, closing). Managers may record presentations to provide valuable feedback to reps.

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**The Benefits Of Virtual Engagement**

Data from Forrester’s Sales Activity Study shows that reps saved, on average, **2.1 hours per week** in travel time after the onset of the pandemic, as they shifted to virtual engagement. Also, **40% of reps** reported having more substantive interactions with buyers via virtual platforms (compared with 26% who did not report these benefits).
Gaining traction with buyers and improving results is an ongoing effort. Sales leaders must work with their marketing and sales operations counterparts to test various approaches and cadences and identify which work best across the buyer’s journey and customer lifecycle. Typically, social and message-based outreach dominate early sales cycle activities as sellers attempt to influence and start dialogues with prospects. The most effective cadence may vary according to persona, product, and sales play.

Sales cadences need to reflect which assets sellers should leverage before, during, and after their interactions with buyers. Buyers may prefer certain types of assets at different points in the buyer’s journey: CIOs, for instance, tend to find sales presentations particularly meaningful in the solution phase of the journey, according to the 2021 B2B Buying Survey.

Sales and marketing asset management systems can help identify assets that elicit the most buyer engagement at each stage of the journey. When integrated with sales force automation systems, these systems can identify which assets correlate with stage and deal conversion.

Optimize And Refine Approaches

Make Each Engagement Count

Buyers have more options and more power than ever before, so sales leaders need to ensure their teams are as effective and equipped as possible when they engage with buyers. Continually build your team’s understanding of buyers by listening, interpreting digital signals, and leveraging analytics to inform future interactions. Forrester data shows that the average B2B sales rep spends an average of 12.3 hours (or around 23%) of their work week directly engaged with buyers. Make sure every minute counts.

Sources

Winning The New B2B Buyer
What You Can’t See Will Hurt You: Leveraging Digital Insights To Drive Sales
The Sales Leader’s Guide To Digital And Virtual Selling (client-only access)
Maximize B2B Sales Performance
And Drive Consistent, Scalable Results

As you navigate a constantly shifting sales environment, look to Forrester for clear insights, curated tools and frameworks, and hands-on guidance to help you stay ahead. We work with sales leaders to address their most pressing priorities, including:

• Building Sales Strategy
• Optimizing Route-To-Market Configuration
• Designing Sales Structure
• Prospecting For Opportunities
• Acquiring New Customers
• Retaining And Growing Existing Customers

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