THE KEYS
to Better Virtual Buyer Engagement

A SALESHOOD PLAYBOOK

SALESHOOD

The pandemic has shown us what we've suspected for some time now: that buyers have less time to devote to meetings and connecting with vendors. Buyers now prefer to do the majority of their research online independently, and the role of the sales professional as part of the process is changing as a result.

Gartner states that **only 17% of the buying group's** time is actually spent meeting with potential suppliers, while the other **83% is spent researching independently or meeting with their buying group internally**. As a seller, this means that the impression that you make when you do have interactions is even more important because it frames the rest of the research your buyers do and the conversations they have.

What this means is you have to **become incredibly efficient with your buyers' time** and personalize your interactions to ensure they're as relevant as possible to the buying group.

The questions are: How can you do that, and what can you do to streamline the process?

This handbook will help you run better remote sales meetings by giving you the tips you need to be more mindful and effective throughout the entire virtual selling process.

In this eBook:

Exploring Virtual Selling Trends

It's clear that selling is changing, but knowing the "why" alone isn't enough. You also need to understand how this evolution impacts both companies and buyers.

How Customers Make Decisions

There has been a rise in the use of self-service tools such as knowledge bases and chatbots, but data makes it clear that this isn't something that's nice to have. It's a must-have: 70%-80% of business decision-makers prefer remote human interactions or digital self-service.

Fewer Conversations, Higher Importance

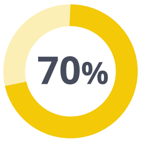
While conversations are important, they are also less frequent than they used to be. 25% of buyers spend less time talking with vendor representatives than they did before the pandemic. This makes every meeting and interaction even more meaningful.

The Rise of the Digital Sales Room

By 2026, 30% of B2B sales cycles will be primarily run through a digital sales room (DSR), which will be used to manage the customer life cycle. In stark contrast to a reliance on Zoom calls and email chains, digital sales rooms provide buyers with a single, centralized portal where they can find content relevant to their sales conversation, ask questions, and engage with reps in a more efficient and more personal way.

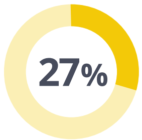
Remote Selling Is Here to Stay

Even as companies and buyers find their way to a new version of "normal," the sales process will never be the same. According to McKinsey's latest research, more than 75% of buyers and sellers prefer virtual interactions to in-person; through these remote interactions:



of B2B buyers

would purchase new solutions in excess of **$50,000**



of B2B buyers

would purchase new solutions in excess of **$500,000**

of B2B buyers

would purchase new solutions in excess of **1M+**

This means sellers must learn how to sell effectively and adapt to what's expected as buyer preferences continue to lean towards remote.
With remote selling, you need to be more thoughtful about what you're doing before, during, and after meetings. **We need to be professional and intentional about following up.** When you engage our customers in a way that's more human, you can help more customers and close more deals.

Before, During, and After: Remote Sales Meeting Choreography

Now that meetings are increasingly happening remotely, they're also getting shorter. There's no time for a meet and greet, no chit chat as you walk from the lobby to the conference room. Time is limited, so you need to be more organized with your planning and communications before, during, and after each meeting. Every meeting can have an impact, and every step along the way matters.

Phase 1: Before the Meeting

Having a successful meeting is always the intention, but if you don't put the right thought into your approach, that success will prove to be elusive. Here's what you need to keep in mind before you enter the virtual room.

Do Your Prep Work

Selling is a team sport. All meeting attendees, internal and external, should be briefed on the goals for the meeting. Bring your team together ahead of time and send briefing documents. Now that we don't have the luxury of meeting in person, it's critical to ensure your virtual meetings are as efficient as possible.

No matter what you're doing and whatever you're going to share, it's okay to share it ahead of time. Give the participants the information they need beforehand so that you can have more productive conversations.

Create a Clear Agenda

Over-communicate about what the meeting plan is, in emails and in the meeting invite. Ensure everyone is on the same page. Don't show up to a call with your people wondering why you're having the conversation. Get alignment beforehand, and don't forget that you'll confirm it again at the top of the call.

Phase 2: During the Meeting

At this point, you can be confident going into the conversation. However, to maximize the meeting, there are a few things to be mindful of:

Be Aware of Your Time

Most virtual sales calls today are 30 minutes… but after introductions and agenda confirmations, you'll really only have 15-20 minutes for substantive conversation. So remember, be friendly, but don't get too caught up in the small talk. Get to the point quickly.

Have a Conversation, Don't Pitch

Present your information, then pause and ask questions. Use the chat, use polls, or simply ask open-ended questions. Be curious. Get your champions and influencers to share what they're thinking. Talk time should be in favor of them speaking more than you.

Don't Forget the Recap

One of the most common virtual selling mistakes is ending the call without a recap. Cover what you heard. Show that you were actively listening, take notes, and verify that you're on the right track. Then, leave space to talk about next steps right there on the call.

Phase 3: After the Meeting

The work isn't over after you close out the call – there's another key action to take to keep the virtual sales process moving forward.

Create a Mutual Plan Email

Immediately write out what you heard about your prospect's situation and – within the next 24 hours – share the next steps and what's expected from each party. If you have access to digital sales room technology, this is a great opportunity to record a personalized video recap of your call and share relevant follow-up documents with the buyer. Having discipline here is critical to turn your meeting into momentum.

6 Ways to Use Video to Improve Your Remote Sales Meetings

Knowing the before, during, and after steps can go a long way to improve your meetings. But, there's more you can do to take the entire sales experience to the next level through the power of video. Some companies use video greetings from sellers for prospecting purposes, but the potential doesn't end there. Using videos as part of the sales meeting process will help your potential buyers engage and make decisions faster.

Here's a look at several different ways to leverage video:

1. Pre-Meeting Confirmation & Agenda Videos

As we established earlier, prepping for meetings by sending meeting confirmation emails with agendas is necessary. Recording a pre-meeting agenda video is a great way to further personalize the meeting invite. Start off on the right foot by showing your potential buyers that you're willing to put time and effort in to put a face to your name and show that you're committed to making the sales process a personal process.

2. Post-Meeting Recap & Follow Up Video

After a sales or customer meeting, we recommend you send a recap. While this is usually done via email, this is also another case where you can use video. You can even mix written and video follow-ups to make the process more dynamic and keep your buyers' attention.

3. Customer Reference & Testimonial Videos

It's always great to get your customers to share their stories in public-facing case studies because it gives your potential buyers a practical example of the impact your company can provide. Using video customer testimonials in your digital sales room is a good way to drive urgency and action. You should also map the customer testimonial story to the industry and size of your buyer's to create a more tailored experience for your prospects.

4. Proposal Explainer Videos

A proposal isn't just something that your sales team creates and sends every day. Your buyers probably see a lot of proposals as well. A great way to differentiate your proposal from the competition is to record a short video walking the buyer through your proposal – they'll appreciate the personal touch.

5. Mutual Success Plan Walk-Through Videos

Co-creating success plans will align buyers with your desired next steps, and – you guessed it – video can also come in handy here. By walking through your mutual plan on video, you can create a more engaging experience for buyers as you help them connect the dots between what you discussed in the meeting and what comes next.

6. Customer Thank You Videos

Everyone appreciates personalized interactions and content from vendors, but this isn't something prospects receive very often. Record authentic videos thanking your buyers for their collaboration, and you'll set yourself apart. Don't wait until the deal is closed to record one. Show your gratitude throughout the entire sales process.

You can find more ways to leverage videos as part of your remote sales process in our blog post:

» Modern Buyer's Journey: 13 Ways To Use Video In Digital Deal Rooms

Your Checklist for Better Remote Selling

Here's a proven checklist on running effective remote sales meetings. It's good for new and experienced sellers to use as a reminder before scheduling calls with new prospects and existing customers.

If you're a manager, share it with your teams in your next weekly coaching huddle or pipeline review call. It's also good to highlight in your 1:1s. It can help your reps identify the steps in which they're competent, and which they may be able to add or change in their process to improve performance.

1. **Preparation:** Prepare for your meeting by researching people and the company. Be in the know of what's going on with the company, people, and industry. This is the time for you to understand the relationship between what you already know and what you want toa know.

2. **Briefing:** All meeting attendees, internal and external, should be pre-briefed on meeting goals. Over-communicate to all stakeholders. More information is always better than less.

3. **Agendas:** A sales meeting without an agenda is like a road trip without directions. Put your agenda in your calendar invites. Reconfirm the agenda 24 hours before a meeting with your meeting attendees and stakeholders.

4. **Storytelling:** The stories you share while slides are presented should reinforce the message. Your words should add color to your narrative. Stories should build credibility and urgency. You want your prospects saying: "I want that." Don't underestimate the power of connecting with others through a story.

5. **Transitions:** How you transition before and after slides is an important skill to master. Strategically plant questions to ask to drive more conversation on key slides and places in your demonstration. It's less about you and more about them, so figure out where those questions will fit without feeling forced.

6. **Curiosity:** Ask open-ended questions. Frame your questions to quantify issues and impacts. Highlight the cost of doing nothing. Remember to be authentically curious and don't read from a script.

7. **Recap:** Leave time before the meeting ends to recap what you learned. Use your customer's words. Continue with the thread of curiosity. Ask: "What did we miss?" Then send recap information.

8. **Next Steps:** Be clear on the path forward, and also ask your meeting attendees their ideal next steps. Share next steps that are proven to help solve their issues faster.

9. **Follow Up:** Send the follow-up notes as soon as you're able to do so. Use a digital salesroom with shared docs to display mutual action plans with your champions.

10. **Time Management:** Always leave time for feedback. Use the last few minutes. If you don't leave this space, you may miss out on an important customer insight or an objection to address.

Want to Have More Productive Virtual Sales Meetings?

Your next virtual sales call can be your best one yet, but only after you've made sure you prepare and follow the tips and advice shared in this guide. Beyond that, you can use a systems-based approach where processes, technology, and skills are guided by real-time data to be more successful in every meeting.
Do all of this, and your virtual sales results are guaranteed to take flight.

Discover how SalesHood can help you run more effective virtual sales meetings: Get a demo with one of our solutions experts.