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SALES CADENCE

Importance and Benefits

TABLE OF CONTENTS

The first thing you do when you travel to a new place is to look up the location on a map. Similarly, if you decide to cook something you haven't cooked before you will refer to the recipe. This is because the navigation in the map and the method in the cookbook ensure a guaranteed result.

Your business is no different when it comes to needing proper guidance to navigate from the start to the end of a process.

There are various activities performed by different teams at every stage of a process in order to complete it. Processes such as lead qualification, customer acquisition, deal review, product delivery, or preparing a work order, each have a set of steps that must be performed in a certain sequence to complete the process.

For example: A work order cannot be submitted without the job status and invoice date, a lead cannot be marked as uninterested unless two email follow-ups have been sent and a phone call has been made, in customer acquisition,one product demonstration must be completed before the customer is qualified as a lead.

A rule book for each process that tells the individual what to do, when to do it, and how to do it can increase the efficiency of the process and the people performing it.

What is a
Sales cadence?

A sales cadence is the rule book for your business process.
It defines the sequence of actions that a salesperson must perform
in order to complete a process. It includes details of every activity
like the emails that must be sent, when to use a particular
email template and when not to use it, how often to call a prospect,
when to fix a meeting, which invoice to send, when to seek
a manager's approval, etc. It is a digital map that ensures the
salesperson knows the process and follows it to a T.

What is the purpose of a sales cadence?

A cadence is a close network of actions that defines required work items. Before building a cadence, managers have to scrutinize the process to remove any action that does not add value. What is left at the end is the most reliable sequence which can be used as a reference by new or experienced members for optimum results.

Some common sales practices in businesses are qualifying leads, customer acquisition, and deal review. When a cadence is built for one of these processes, you need to take a closer look at the effectiveness of every activity and identify what works and what does not.

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For example:

- If sending a follow-up email for the third time in a day does not help in establishing contact with the lead while a phone call does, then you may replace the third email activity with a phone call.

- If the email open rate of a particular template is better in a certain region compared to other regions, it is best to distinguish the templates geographically and send different emails to each region based on what the customers respond best to.

- If the lead follow-up process yields better results when there is a gap of 3 days between the first email and phone call compared to sending an email everyday, then you should change to the process that gives better results.

- If the likelihood of closing deals with key accounts is higher when deal reviews take place every week, then it is best to follow the same review timeline for other key accounts.

With proper scrutiny of your processes, you will be able to identify redundancies or mistiming of some practices and change them for the better. Eventually, these changes will be reflected in the overall well-being of your business with better conversions, more deal closures, and improved team efficiency.

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What type of cadence should you build?

The cadence that best suits your business depends on the sales model you follow.

A shorter sales cycle with a lower deal amount.

A longer sales cycle with a higher deal amount.

A shorter sales cycle with a lower deal amount and only a few decision makers is a transactional sales model. A cadence for this model would be simple with few touchpoints before the sale closes.

A sales cycle that is longer with a higher deal amount, which has at least 5−6 decision makers is a relational sales model. Usually, processes in larger companies are relational as the reps focus on building a stronger rapport with the customer, making the sales cycle longer with many touchpoints. A cadence for this type of sales model will be complex with well-defined sales activities at every stage and will have branches to allow different sales outreach tactics depending on the outcomes.

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Simple sales cadence

Managers can use [Blueprint](#) to create best practices for their team members and guide them through a process by defining the activities they need to perform at each stage. The sales cadence can tell them when to send an email, which email template to send, the call script that should be used, or provide a checklist to make sure they have completed all the required activities before closing the stage.

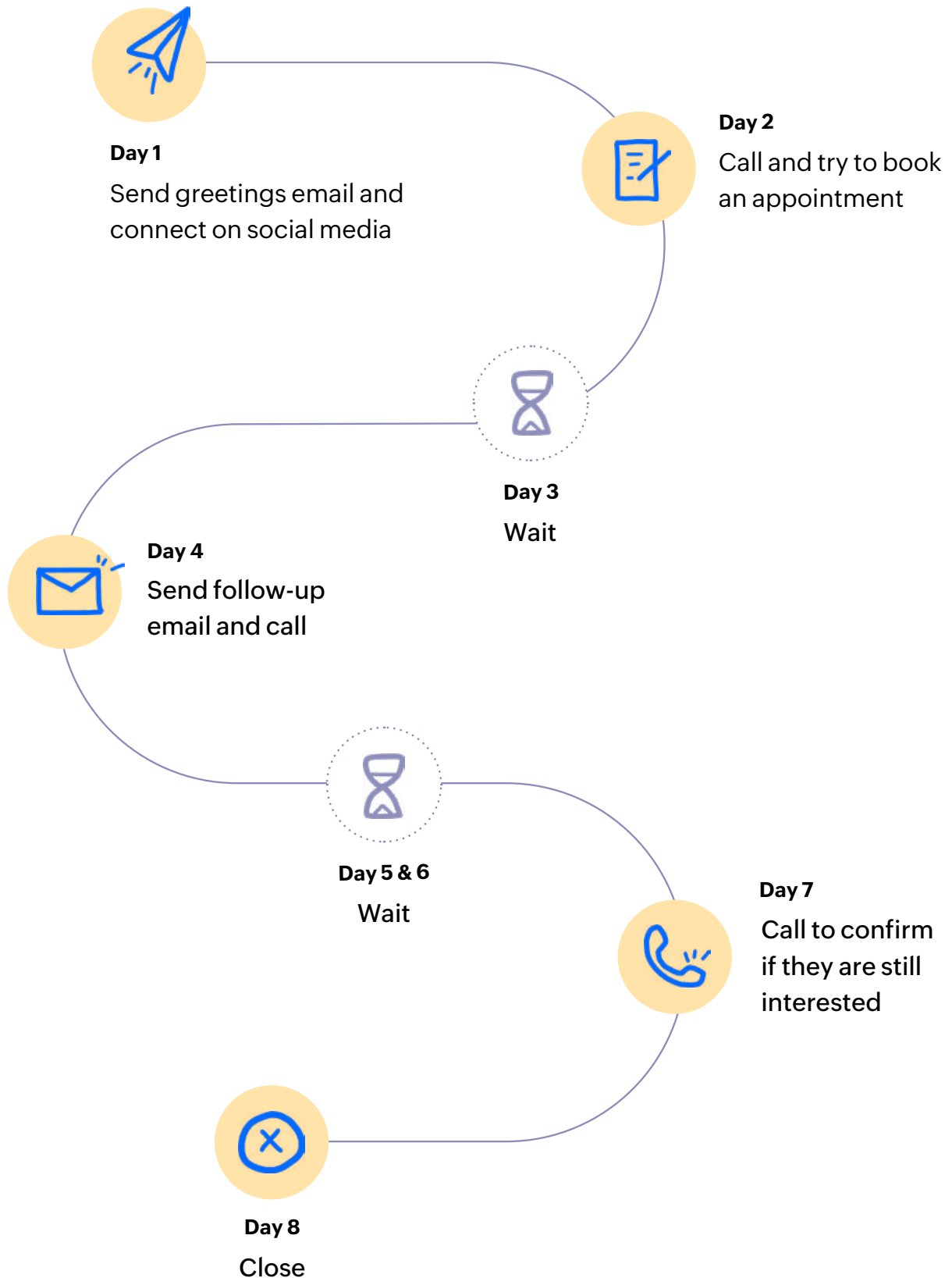Let's take a look at some examples of a simple sales cadence.

TIP

The emails can be automated through workflows and reminders can be set for calls.

Inbound prospecting

The leads who have already expressed an interest in your business or who you have being contacted in the past are easier to engage. They are aware of your brand so you can directly call them, send an email, or connect on social media. The frequency of subsequent contacts can be 1–2 days unless they explicitly ask you not to contact them.

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Here is an example of a sales cadence you might use in this situation:

Day 1

Send greetings email and connect on social media

Day 2

Call and try to book an appointment

Day 3

Wait

Day 4

Send follow-up email and call

Day 5 & 6

Wait

Day 7

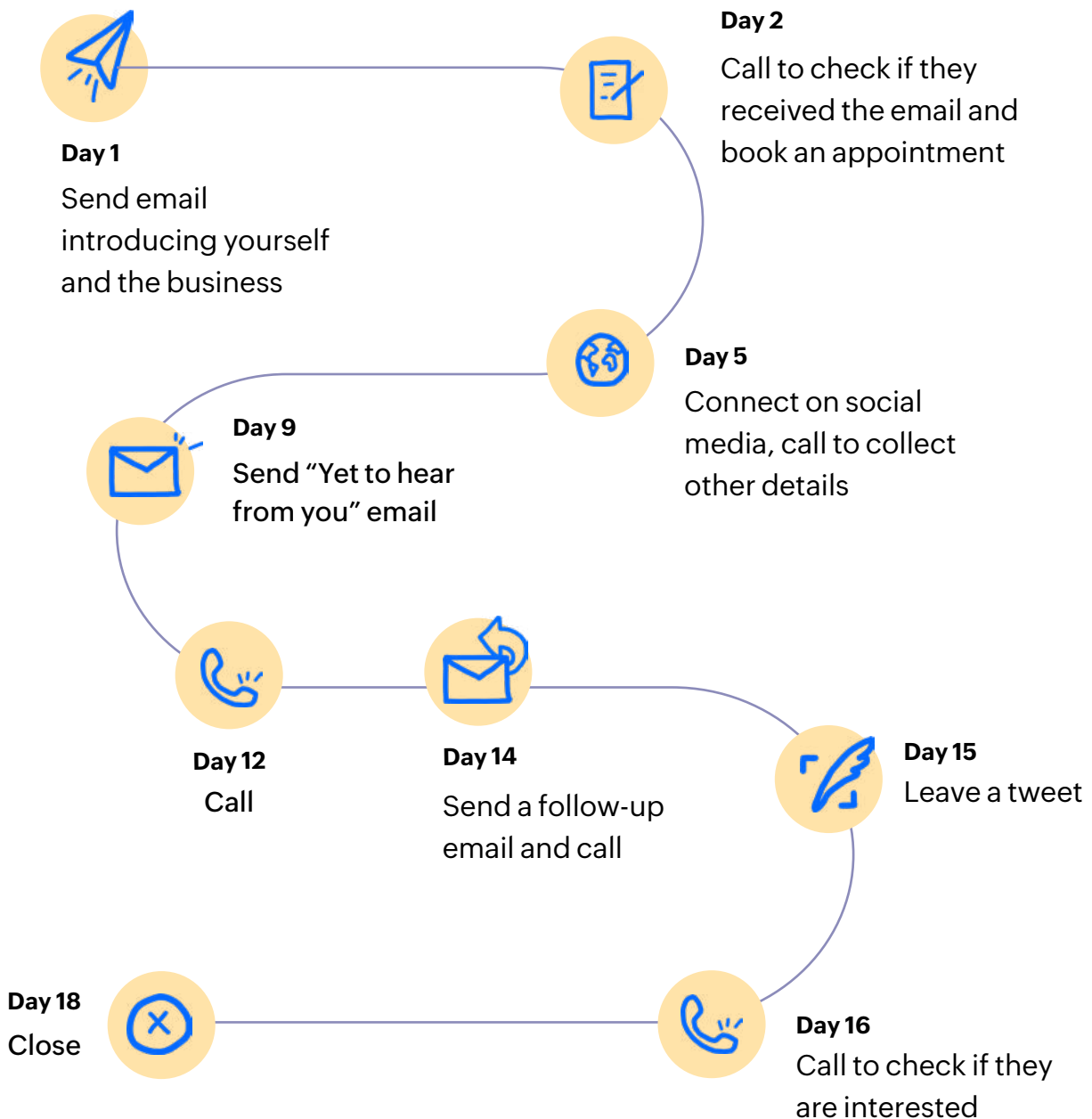Call to confirm if they are still interested

Day 8

Close

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Outbound lead qualification

The leads are new and the sales rep needs to evaluate their interest before getting into the details. So they send an initial email. The subsequent contact attempts need to be paced carefully to avoid overwhelming the lead while remaining persistent.

Here is an example of a sales cadence you might use in this situation:

Day 1

Send email introducing yourself and the business

Day 2

Call to check if they received the email and book an appointment

Day 5

Connect on social media, call to collect other details

Day 9

Send "Yet to hear from you" email

Day 12

Call

Day 14

Send a follow-up email and call

Day 15

Leave a tweet

Day 16

Call to check if they are interested

Day 18

Close

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Branched sales cadence

Business with larger organizations takes longer as the reps have to spend a lot of time establishing a relationship with the customer. The sales outreach strategy varies based on the outcome of a call or an email. The managers can study the process to understand the different paths and create a sales cadence with multiple branches.

The image below shows a sample branching sales cadence created using Blueprint.
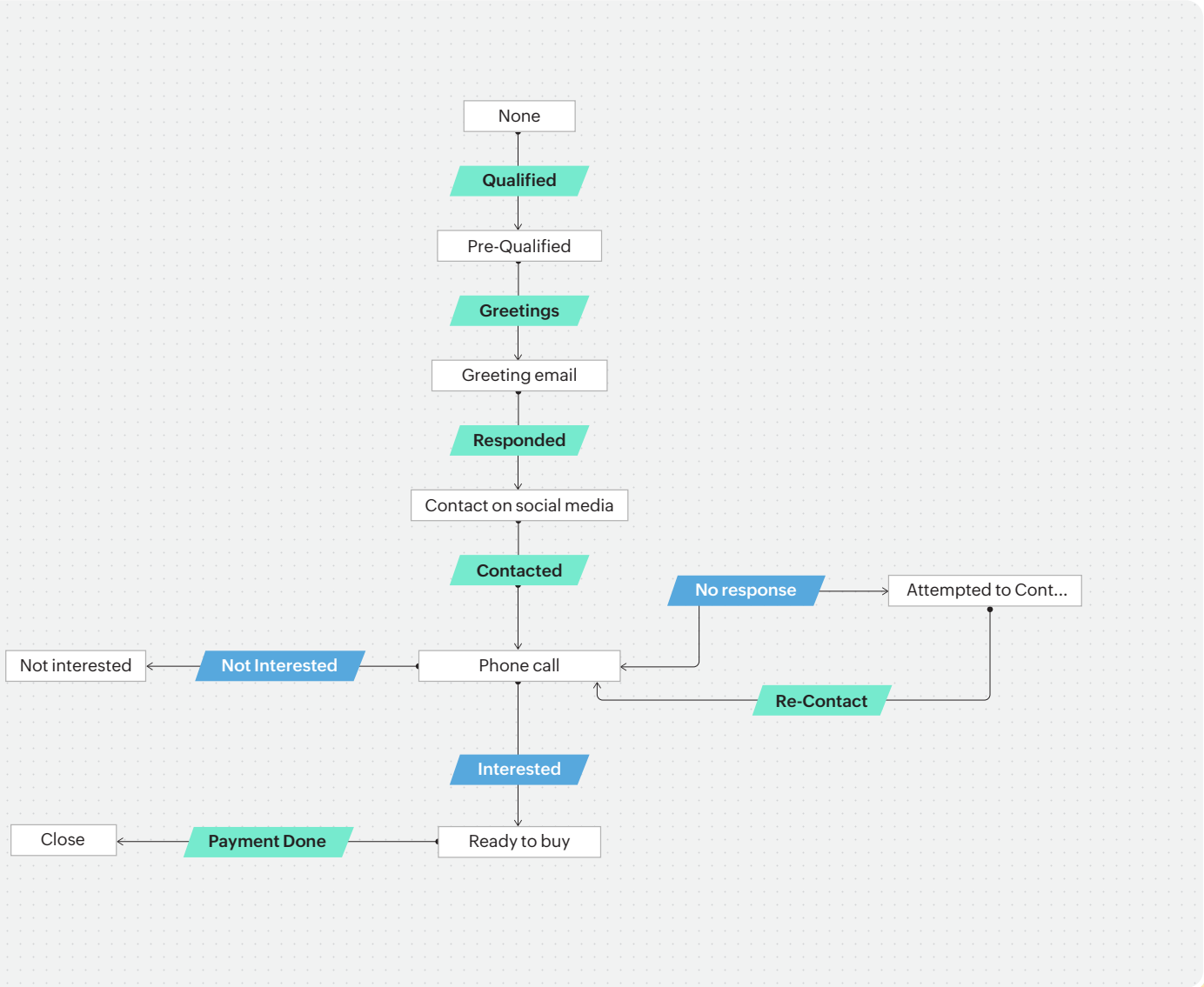
Multi-branched complex sales cadence

A relational sales cycle with a B2B or B2C business model involves multiple processes starting from lead qualification through to product delivery before the sale closes. An array of sales activities are performed by multiple teams at each stage either together or separately but simultaneously in order to proceed to the next stage. This also increases dependency among the teams, for example an invoice cannot be created until the payments team gives clearance.

The outcome of each stage will trigger a different outreach at the next stage, creating an intricate loop between the stages. For example, if the customer returns the product, the sales cycle reopens, triggering another loop of activities that involves the logistics, payments, and delivery teams.

A cadence to orchestrate such an intricate process is complex and requires a thorough understanding of the process and customer reactions at every stage to establish a link. CommandCenter connects stages from different processes bringing them altogether under one umbrella. The customer's response at each stage governs the direction the sales process will take.

Let's take a look at some examples of a multi-branched sales cadence.

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Product sale in ecommerce business

The following setup of an ecommerce business can have different flows of events depending on the customer's response:

Website visit to product delivery

The sale of a product begins with an interested buyer visiting the website, adding an item to their cart, placing the order, making the payment, and then the order being dispatched, delivered, and closed. This is one way the process flow can take place.

Incomplete order

An alternate flow of events can take place if the customer exits the sales process in between or pauses at a stage.

For example:

> They leave the items in their cart, they place the order but don't make a payment, or they leave your website without purchasing. In these situations, the company must engage the customers instead of letting them go. They can send emails reminding them of the items in their cart, prompting them to make a payment, or calling them to find if they wish to continue the transaction.

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Order return

A third flow might occur if the customer decides to return the product. The sales team will reopen the deal and branch out to another process that handles refund and pickup.

Each of the above activities is managed by different teams. For the process to go on without interruption, a certain level of coordination is needed.

The CommandCenter will ensure that these processes are interlinked and the message is passed on from one stage to another to adjust the flow of events depending on the customer's actions.
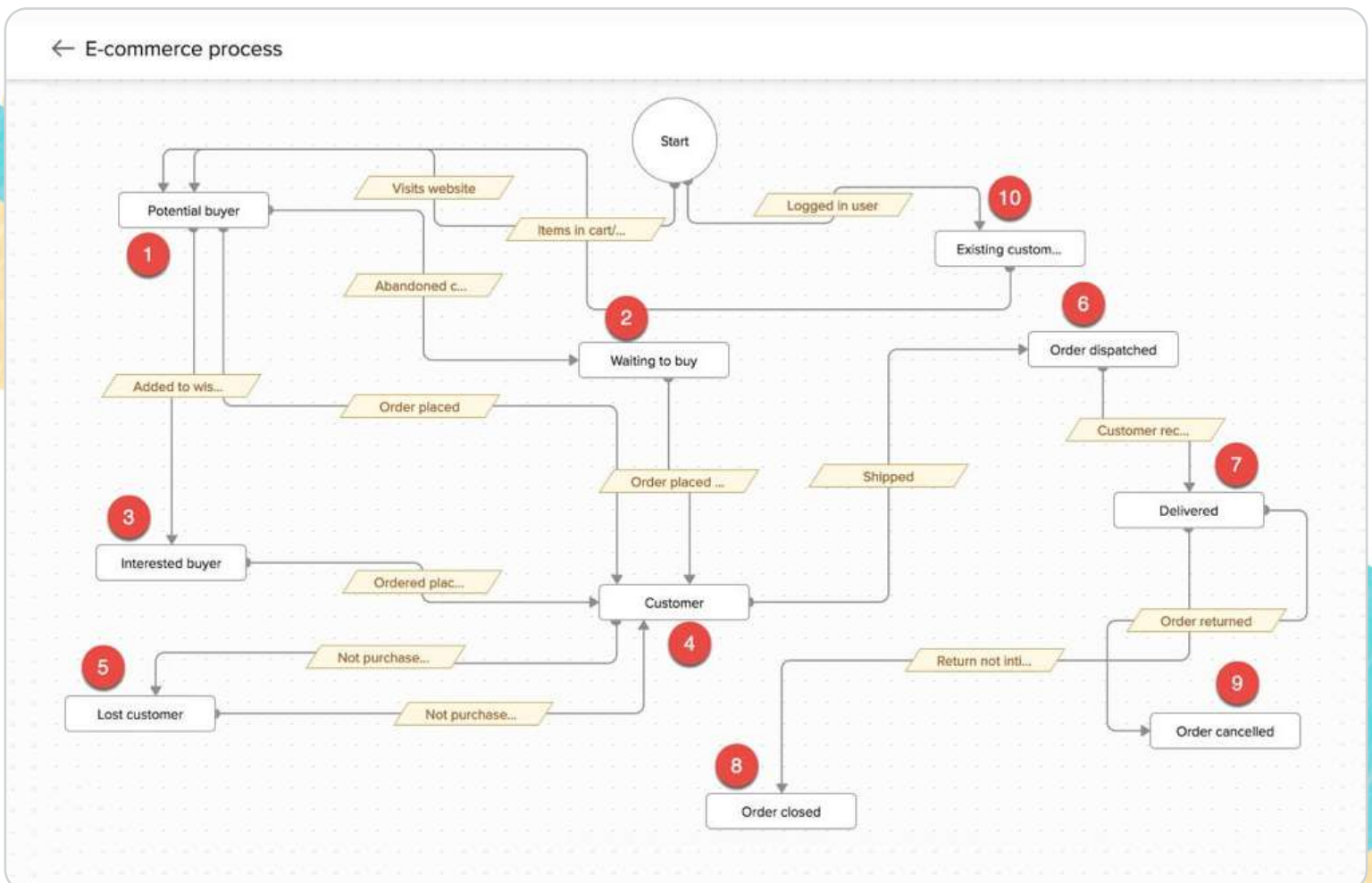
Communication trail after customer journey ends

During a sales journey, there are several reasons to stay in touch with customers, such as sending emails, making phone calls to update them about their delivery status, requesting feedback or address verification.

Some businesses, such as car insurance providers, need to communicate with their customers about other extended services like claim management or part replacement, which take place after the insurance is purchased.

Since these services are mostly provided by third-party vendors, key information can sometimes fall through the gaps without careful communication. Extended support from the company at this stage is a step towards building stronger relationships and loyalty among customers.

With the purchase of insurance, the sale is closed and policy renewal or premium collection is managed by a separate division. In the event of a claim request, the claims department takes over and manages the process.

A cadence built for this type of a business model will help the company stay informed whenever a claims request is received and proactively get in touch

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with the vendors to monitor the progress of the claim filed by the customer. They can receive notificavtions at every stage and inform the customer about the timeline and other details.

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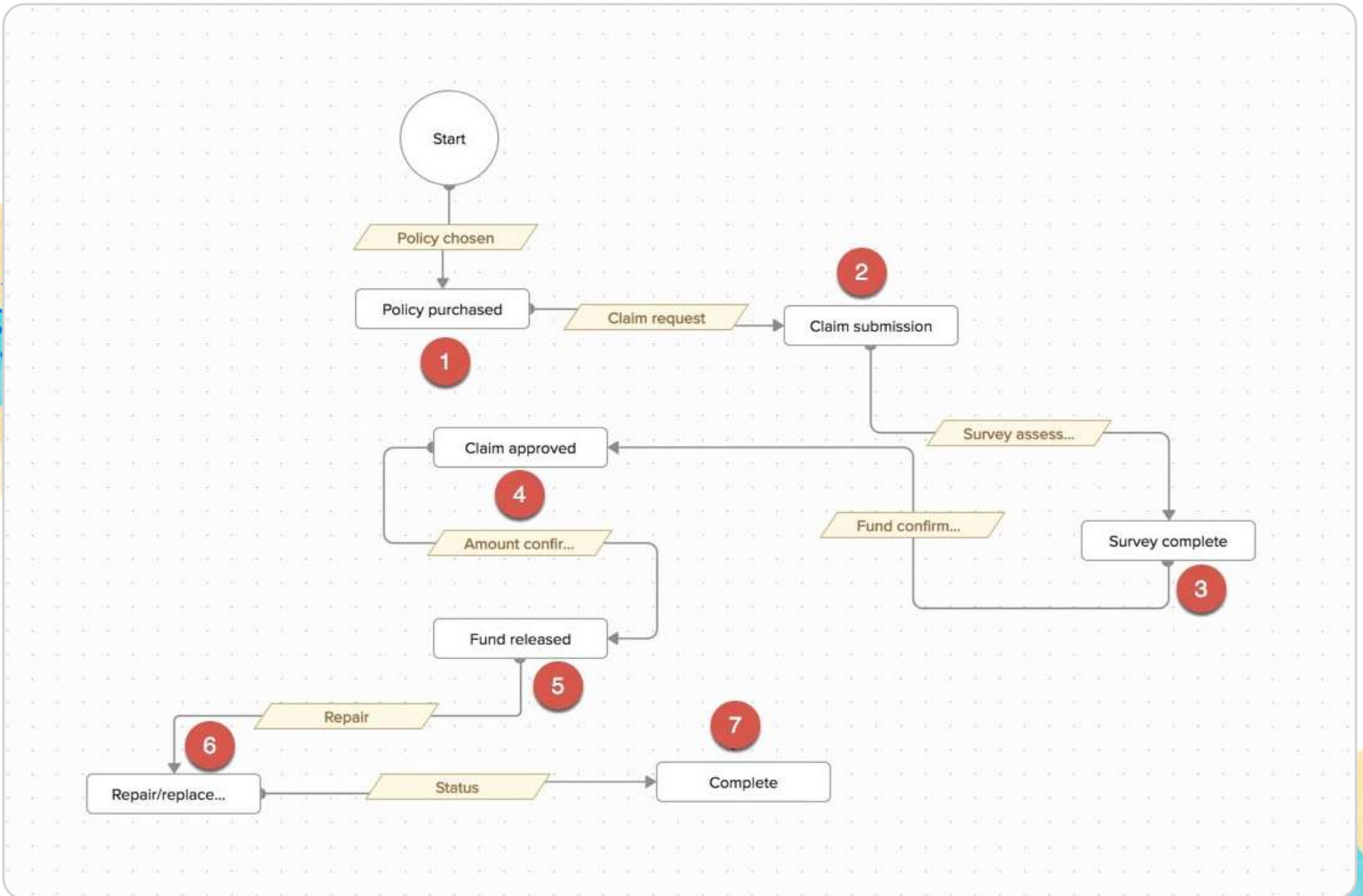
Things to consider when building a sales cadence

For your sales cadence to give the desired results and mimic your business model, you must unravel every small aspect of your business processes. Some points we recommend here may help you achieve this:

Write it down

Take a pen and paper and make a list of all your business processes.

Break down each process

Write down every detail about each process. The stages, how and when a record moves to the next stage, activities performed at every stage, mandatory activities, any specific condition that must be followed in order to proceed to subsequent stages, etc.

Connect the dots

Find out whether the processes are connected with each other.

Identify the points of crossover

The processes may seem isolated when you look at them individually, so look closer and identify the point or stage where one or more processes meet.

Goal of the cadence

Identify the reason you want to build a cadence. Your goal might be to create a systematic and unified work ethic across your team or to monitor the overall performance of the process or automate it to increase efficiency and turnaround time.

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Match requirements with cadence type

Choose the right type of cadence for your process and goal.

Understand CRM data

Understand the basic requirements of the two types of cadence: Blueprint and CommandCenter. Your requirement and cadence type may match but your data may not yet be appropriate to start. For example, with a blueprint, all your data must be in one module. If your deals are stored in different modules, you cannot create a blueprint.

Data alignment

Look for ways to adjust your data so that it suits the selected cadence. Get rid of modules that are not needed, create [layouts](#) to manage different data types in one module, and [add fields](#) if necessary to store values within a single module.

Test and validate

Build a sample process and test it in Sandbox. Involve your team members to validate it. Make improvements as needed.

Revisit

It is best practice to revisit your processes from time to time and improve them by adding or removing a few steps to ensure efficiency.

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Related resources

Tutorials:

Help documents:

Videos:

FAQs:

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