



SALES EXPERTS PLAYBOOK

Techniques & Strategies
for Winning Business

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With the rapidly changing sales space, techniques and strategies are increasingly changing. We turned to some of the top sales leaders to hear what they have to say and capture valuable insights through their years of experience.

In this guide, we gathered advice and tips from VPs and Heads of Sales at some of the top SaaS companies such as Salesforce, Zoom, Microsoft, Acquia, Drift, Eventbrite, Datadog, Slack, SurveyMonkey, and HPE Software.

We wanted to provide you with this collection of valuable insights so you can share with your team and execute techniques and tips that resonate with you.

Enjoy!

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**JOE WYKES**SVP of Worldwide Partnerships
& Sales at Acquia

“I believe brands are under siege today more than ever before.”

PROCESS OF TRANSFORMATION

In The MullenLowe Group interview series called “The Business of Transformation,” Ben Mooney, the Global Head of Business Transformation, interviews Joe Wykes, SVP of Worldwide Partnerships and Sales at Acquia. Mooney asks Wykes about business transformation and where business priorities will shift in the future.

In terms of the process of transformation, Wykes believes many businesses involuntarily think of their marketing first, when a holistic approach needs to be taken.

“We work with many brands around the world, and the key element [with transformation] is that it has to be thought of as a program. What we encourage with projects we are involved in, is that tremendous attention is paid to the whole change management program,” says Wykes.

Wykes notes that it’s also about adoption and absorption: “The entire organization and the consumers themselves actually need to adopt that new way of doing business. That has to be managed very carefully.”

MORE COMPETITIVE THAN EVER

Wykes states that there are three golden principles to follow for reshaping a business: trust, integrity, and communication. He also strongly believes that the customer journey needs to be considered when companies are assessing transformation.

Wykes explains, “I believe brands are under siege today more than ever before. I think that what we see is, frankly, consumer loyalty to most brands is quite low. There’s been an emergence of new technology and it makes things more competitive than ever. For many organizations, their competition will try to re-segment a market by emphasizing price and speed – think faster, cheaper.”

For example: “In commerce, marketplaces have figured out how to win on price and fulfillment. That can become a real race to the bottom for many brands. It’s very hard to compete and win on those terms. So, customer experience is what ends up being the difference, and that is perhaps the vital ingredient – actually providing an engaging, relevant, very personalized experience, and doing that across multiple channels.”

“...three golden principles to follow for reshaping a business: trust, integrity, and communication.”

Wykes concludes that personalization is crucial when assessing factors that will hold companies in a good place for the future. Providing a personalized customer experience is a central factor in standing out to competitors.

Joe
Wykes

SOURCE: <https://www.mullenlowegroup.com/news/joe-wykes-on-the-business-of-transformation/>

**JEAN-PHILIPPE COURTOIS**Executive Vice President and
President, Microsoft Global Sales

TRANSFORMATION IS A LONG-TERM JOURNEY

In an interview by The Record, Jean Philippe Courtois, Executive Vice President and President of Global Sales at Microsoft, discusses how he is enabling technological success across the globe.

Courtois states that transformation is a long-term journey and driving success comes down to the people in your organization.

When asked about what advice he would give to organizations looking to begin their digital transformation journey, Courtois states, "Whenever I meet with customers I tell them that successful digital transformation starts with a culture transformation that engages the hearts and minds of their employees."

He explains that organizations need to be very clear about their purpose, "Investing energy at every level."

Next, the interviewer asks Courtois what tips he gives his teams to drive sales and transformation.

"If your organization is to thrive and grow, change is central to commercial opportunity. All successful businesses evolve. And one of the business functions most disrupted by digital transformation is sales – bringing with it both challenges and opportunities. I know this because I've watched it happen over the years, and today, that evolution is driven by digital," Courtois explains.

“Investing energy at every level.”

DRIVE SALES AND TRANSFORMATION

Next, the interviewer asks Courtois what tips he gives his teams to drive sales and transformation.

"If your organization is to thrive and grow, change is central to commercial opportunity. All successful businesses evolve. And one of the business functions most disrupted by digital transformation is sales – bringing with it both challenges and opportunities. I know this because I've watched it happen over the years, and today, that evolution is driven by digital," Courtois explains.

COURTOIS SHARES THE 3 KEY LESSONS HE OFTEN SHARES:

- 1 Shaping or evolving the right culture is paramount to any transformation initiative
- 2 Recognizing that continuous learning and development are fundamental to success
- 3 Instrument the way you measure the change by leveraging digital tools and data to measure how the new habits are landing one person at a time

Jean-Philippe
Courtois

SOURCE: <https://www.technologyrecord.com/Article/how-jean-philippe-courtois-is-building-success-at-microsoft-73344>

**EDWARD MCDONNELL**Executive Vice President,
Enterprise Sales at Salesforce

UNDERSTANDING TRENDS

In the podcast “Data-Driven Alignment with Edward McDonnell,” McDonnell discusses the relationship between sales and marketing and making data-driven decisions.

McDonnell explains, “Any sales leader is always grounded in data. We want to understand information, we want to understand trends, we want to understand what is the data telling us on what’s working and what’s not working.”

Are we converting unknown data to known data? McDonnell states, “There’s nothing simple about getting people that don’t know you, to know you. That is a huge part of the top of the engagement funnel that has to really be thought through.”

And once we do know them, “How are we orchestrating an experience with that known user to know more about us, buy more from us, do something more with us - whether that’s buy for the first time, buy for the second time, come to an event, there’s so many different things that marketers are going to try to do with their known universe of data.”

“Any sales leader is always grounded in data.”

MARKETING AND SALES ALIGNMENT

McDonnell discusses that this is when marketing and sales alignment is so important: “Coming to a sales leader and saying ‘here’s the campaign, here’s the program, here’s where we’re making investments with our dollars, with the end outcome being X.’ And in a traditional B2B product service world, X should always be some level of ‘here’s how we’re generating top of the funnel pipeline for your team to be able to go out there and convert mid-funnel down.”

“I think sometimes sales leaders and marketing leaders together are trying to think about ‘what’s the big next bet’ or ‘what’s the big next thing.’ Sometimes blocking and tackling works too. There has to be a really good balance behind ‘we know these campaigns work because we have history, we have data, we have results, that prove that over time these hold a consistent level of working,” McDonnell explains.

McDonnell says Sales and Marketing can’t only align on data: “Data-driven has to be a key pivot that everyone makes. But it can’t be only that. You have to make sure that the beginner’s mind, that we continue to let Marketers unlock their creative passions because that is what drives the best ideas. Data will always inform you, but data can’t be the only thing that informs us. We have to be able to test, and try, and have fun as well.”

“Data-driven has to be a key pivot that everyone makes. But it can’t be only that.”

**Edward
McDonnell**

SOURCE Full Podcast: <https://marketingtrends.com/episodes/ed-mcdonnell/>

**HILARY HEADLEE**

Head of Sales Operations and Enablement
at Zoom Video Communications

THE IMPORTANCE OF ALIGNMENT

At the LeanData OpsStars conference in San Francisco, Hilary Headlee, head of sales ops and enablement at Zoom, sits down in this podcast called “Spotlight on OpsStars.”

Hilary discusses, “With the emergence of all the different technologies and ‘hyper titling’ we started to split up - marketing, customer success, sales.”

Hilary Headlee talks about the importance of aligning all teams and how important that can be to your business outcomes: “You can be separated into different departments if you can get the cross-functional alignment, and if you can get that you can act like a revenue operations team.”

With all the process changes, Headlee believes it's important to have 1 or 2 leaders for each team and then all leaders are aligned with one another.

“It's important for all leaders to be aligned. When there is a lead, there shouldn't be multiple people to talk to. You should just be able to talk to one person and feel comfortable. We are trying to deliver that the customer always comes first,” Headlee explains.

“It's important for all leaders to be aligned.”

PROVIDE CLARITY AND ALIGNMENT

Shared data across all teams is integral to success as well. “What sits behind our marketing, sales ops, and customer success teams is a unified system and data science team. So we're all putting our same information into the systems.”

Headlee states, “Then we all use it to drive insights into each of our areas. It's all coming from that central source and that can provide a lot of clarity and alignment”

Some of the complexities throughout companies is the question of - who owns the data?

“I am of the spirit that everyone owns the data because data should drive your business decisions. And if you are an owner of it you will do a better job keeping it complete, accurate, and clean - knowing that for the most part, it will be used for customers in the end,” Headlee says.

“That may be controversial at other companies. At Zoom, we keep that spirit.”

“I am of the spirit that everyone owns the data because data should drive your business decisions.”

Hilary Headlee

SOURCE Full Podcast: <https://www.dmnews.com/podcast/podcast/21103067/spotlight-on-opsstars-hilary-headlee>

**ARMEN M. ZILDJIAN**

Vice President of Sales at Drift

DELIVERING VALUE

In Costello's "People > Processes" series, Teresa Weirich interviews Armen Zildjian, VP of Sales at Drift.

When Teresa Weirich asks Armen Zildjian to share what he thinks about delivering value to prospective buyers, he states that Drift has adopted a "tour guide" approach.

Zildjian states, "Visitors already come to your website with a certain level of understanding, that's why we now have to meet buyers where they are in the process."

Why the tour guide terminology?

Zildjian explains, "If you were to visit Rome, you would spend weeks researching the best restaurants, the best museums, and the best activities. You may have a well-laid out plan—until you arrive and the locals tell you where you need to go for the most authentic Italian experience. By adopting a similar approach to his team's sales process, Drift can offer guidance and support by closing the gap between the world of what the prospect has read, and the world of what Drift actually is—and only then determine if there's value for the prospective customer."

“...we now have to meet buyers where **THEY ARE** in the process.”

BUILDING BUYER TRUST

How can sales professionals build buyer trust? According to Zildjian, they have to give up some control in the sales process.

This can be actions such as not bombarding the prospect with sales questions right off the bat as well as really listening to prospects. Zildjian says that he finds sales reps feel like they're listening, but they're really just thinking about what they're going to say next.

Zildjian explains, "As sales leaders, we're guilty of burying the modern sales rep with BANT, MEDDIC, and other tactics that we require them to get from the prospective customer. We say to our reps 'you can't get off the call until you capture these things about their pain points, budget, decision-making process, and so on.' While it is key to collect as much information as possible, we must do it in a way that is conversational—not an interrogation. We must allow the prospect to have some control."

Lastly, Zildjian states that he instructs his sales team to not sell the biggest packages: "We optimize not for getting the most ACV that we can on the first deal, but for exposing the business to the value of Drift. Every day, enterprise businesses are seeing incredible results from their investments. We believe we're generating goodwill and positive praise in the market, and that over time, the rest of the wallet share will come to us, thanks to the value we're providing."

“We believe we're generating goodwill and positive praise in the market, and that over time, the rest of the wallet share will come to us, thanks to the value we're providing.”

Armen M.
Zildjian

SOURCE: <https://andcostello.com/blog/people-processes-an-interview-with-armen-zildjian-vp-sales-drift/>

**CHLOE STEWART**

VP of Global Sales at Eventbrite

CREATING A PARTNERSHIP

In an interview with Job Portraits and members of the sales team at Eventbrite, Chloe Stewart, VP of Global Sales, discusses their customer-centric philosophy.

Stewart explains that she views sales at Eventbrite as more of a partnership and that they become an extension of their customers' business. Stewart states, "As partners, we work with our event organizers to drive the success of their businesses. When our customers are successful, we're successful."

From a manager's perspective, Chloe has found that "being a better seller here means developing your skills as a strategist. I've watched my team pivot and adapt to our market in order to grow and succeed."

"The conversations our team has with our prospects and customers go way beyond a traditional SaaS sale," says Stewart.

Stewart explains that it's important to be equipped with the tools and insights to serve as a strategist and a business partner: "We're now contributing a larger percentage of Eventbrite's revenue, so we're truly impacting the trajectory and success of the company. It's one thing to cash in a great paycheck as a seller, and another to make an impact on the overall business."

“When our customers are successful, we’re successful.”

CAPITALIZE ON BEING PASSIONATE

In regards to team philosophy, Stewart says, “The Registration business unit works with a really diverse book of business. The success of our team relies on thoughtful, prepared, and curious sellers who stay on top of our constantly changing market and competitors.”

"Eventbrite as a platform was not always considered a serious solution for our more enterprise, B2B clients, and it's up to my team to prove otherwise," Stewart explains.

Impacting the lives of their clients in a tangible way is important: "Passion is what we capitalize on as sellers. Ultimately, the people we're selling to care deeply about the experience of their attendees. And we've all been attendees, so it's easy to relate to the problems our customers are trying to solve."

“The success of our team relies on thoughtful, prepared, and curious sellers who stay on top of our constantly changing market and competitors.”

**Chloe
Stewart**

SOURCE: <https://eventbritehq.com/eventbrite-sales-hits-its-sweet-spot-1da643252e72>

**SIMON MUTLU**

Large Enterprise Accounts at Slack

GUIDING YOUR CUSTOMER

In Costello's "People > Process" series, Teresa Weirich interviews Simon Mutlu, who works with Large Enterprise Accounts at Slack. Mutlu discusses how in the 20 years he's been in sales, he's learned that prospects are often overwhelmed by industry options.

Buyers today are navigating through numerous options and evaluating solutions for multiple needs.

Mutlu says that becoming an industry guide is one way to set himself apart: "Rather than by simply reciting my company's product capabilities and value proposition, I've realized that the best way I can set myself apart is to put myself in my customers' shoes and become their guide to the industry as a whole."

Mutlu explained that this is critical in his role at Slack as the market has become increasingly noisy. He explained that his role is to be "an expert in collaboration, to understand and articulate best practices, and guide prospects to the best solution for their needs."

Mutlu has put this 'industry guide' philosophy into practice by creating a new group of collaboration leaders called "Slack Networks."

“... guide prospects to the best solution for their needs.”

BECOME THE ANTITHESIS OF WHAT YOUR STAKEHOLDERS EXPECT

Weirich explains that this group is composed of 40 individuals from enterprise companies with the intention of growing into a large group: "The goal is to open up general discussion topics for all to participate and to focus on the industry as a whole, and not just Slack's product offerings." This group of credible peers are constantly sharing ideas and growing together.

Lastly, Mutlu discusses the importance of being the antithesis of what your stakeholders expect.

Buyers often expect to work with pushy sales professionals who are worried about their own agenda. Mutlu believes that this presents a huge opportunity for salespeople: "One to become the antithesis of what stakeholders expect. Oftentimes, relationships are forged because the prospect has learned to respect and trust the sales professional with whom they're working."

Being an industry leader and guide to your prospects will help grow that trust.

“...relationships are forged because the prospect has learned to respect and trust the sales professional...”

**Simon
Mutlu**

SOURCE: <https://andcostello.com/blog/people-processes-interview-simon-mutlu-large-enterprise-accounts-slack/>

**DAN FOUGERE**

Chief Revenue Officer at Datadog

“...make sure you can continuously work on your skills”

TAKE RESPONSIBILITY

In a Sales Hacker podcast, Sam Jacobs interviews Dan Fougere, CRO of Datadog. As CRO, Dan is responsible for Datadog’s global sales strategy and execution.

Fougere discusses his 3 tenets of Pipeline Generation:

1. Make sure it’s clearly stated to everyone that this is important
2. Create a collaborative, safe environment for constant learning
3. Track pipeline generation

Fougere starts by explaining his #1 tenet: “Make sure that it is clearly stated to everyone that this is important, this is something that we all do.”

Fougere explains, “A mistake that I think a lot of salespeople make is they think that ‘oh yeah cold calling is for when I was an SDR when I was 22,’ it’s not - cold calling is not dead. It’s not the sole responsibility of Marketing or SDRs. It’s great to have leads from Marketing, it’s great to have SDRs doing the work... but, for example in baseball, they call it a 5-tool player, where you can run fast, hit for average, field, throw, etc. and this is the same thing as a sales professional. You want to make sure you can continuously work on your skills and you’ve got to take responsibility for creating pipeline.”

“One thing about that is to first help everybody see what’s working,” says Fougere.

ENCOURAGE SHARING OF WHAT WORKS

Creating a collaborative, safe environment (tenant #2) is key to this: “By creating that collaborative safe environment for constant learning, people are going to share, and encourage sharing of what’s working.” Fougere says that ways you can do this are sharing emails that are working, share what’s not working, techniques, times that work best, etc.

Fougere has also found that this is better for customer satisfaction: “You’re not just throwing a bunch of stuff at the wall and hoping that it sticks, you’re really refining your message and your techniques so that when you do engage with a customer, you’re having valuable interactions and valuable engagement.”

Tenet 3 is to track pipeline generation: “So we can actually delineate through pipeline that’s been generated through outbound efforts and pipeline that is generated through inbound leads from our SDRs.”

“So, that way we can get a more accurate view of the truth. And we can also help people get better who are maybe falling down in those areas and train some of the enablement and training that we’re doing,” Fougere explains.

“You’re not just throwing a bunch of stuff at the wall and hoping that it sticks, you’re really refining your message...”

Dan Fougere

SOURCE Full Podcast: <https://www.sales Hacker.com/effective-executive-sales-leadership-qualities/>

**SUE BARSAMIAN**

Former SVP, Chief Sales & Marketing Officer for HPE Software, Board Director at NortonLifeLock, Box, Gainsight, Xactly, Boardspan

QUALITIES OF LEADERSHIP

Great leadership is the foundation of any organization, big or small. Udacity sat down with Sue Barsamian during their recent “Udacity Thought Leader” series webinar to discuss the qualities leaders need to create and manage high-performing, productive teams.

Sue offers these five highly effective tips to becoming a successful, high-performing leader.

1. Stay close to the product or customer
2. Diversity makes strong teams
3. Understand the roles and responsibilities in a matrixed organization
4. Keep evolving in your career
5. Don't wait to reskill

Stay close to the product or customer: “There are many great roles in a company. But no matter how you do your job, the closer you are to understanding the customer and the product, the closer you are learning what makes the business of the company run.”

Diversity makes strong teams: The author, Cary Fulbright, states that throughout their discussion: “Sue credits much of her success to surrounding herself with a wide range of people – each with their own unique skill-set. Diversity, she believes, can mean so many things. But for her, the idea is to always build a non-homogenous team.”

“...the idea is to always build a non-homogenous team.”

THE SCIENCE OF DIVIDING TASKS

Understand the roles and responsibilities in a matrixed organization: “Everybody thinks about the art of selling. The art of selling is understanding how you make your customers successful. And when your customers are successful, they buy and buy more. The same concept holds true in a matrixed organization.” Barsamian believes there’s a science of dividing up tasks among departments and are encouraged by leaders so that everyone feels they’re working together for a common purpose.

Keep evolving in your career: Deciding who you are and who you want to be is a crucial component of long-term career success. “I subscribe to the career concept of, “It’s both a jungle gym and a ladder,” Barsamian says. A career path can track sideways as often as it scales up.

Don't wait to reskill: By the time many companies figure out their exact needs for identifying required skills and abilities, it’s typically too late to invest the time and money into retraining: “The future is becoming more automated with the use of machine learning and artificial intelligence,” Barsamian said. “Don’t be passive in how your role will transform.”

“Don't be passive in how your role will transform.”

**Sue
Barsamian**

SOURCE: <https://blog.udacity.com/2019/12/technology-leader-sue-barsamian-shares-her-leadership-playbook.html>

SOURCE Full Webinar: https://business.udacity.com/SueBarsamian_PlaybookforTeams_OnDemand

**ANGIE JONGEJAN**

Director of Sales at SurveyMonkey

THE COMPETITION OF HIRING

In a Recruiting Future's podcast called "Recruiting In A Highly Competitive Market" with Matt Alder - Angie Jongejan, Director of Sales at SurveyMonkey, shares her tips and insights for recruiting top sales talent in the highly competitive tech industry.

Jongejan discusses the way SurveyMonkey has overcome the challenges of hiring diverse talent in a competitive landscape.

Hiring diverse talent: "We've done targeted outreach to diverse talent from folks within our leadership team, we've attended recruiting events in the area for sales folks, and we've done a sourcing jam with folks on the team with the focus on thinking through this desire for more diverse talent"

Hiring in a competitive landscape: "There are 2 pieces to trying to get people really excited about SurveyMonkey and get them to choose SurveyMonkey. One is providing a really fantastic experience for candidates, so making sure that we're thoughtful about the communication we're having with the candidates, the ways that we are highlighting the culture here at SurveyMonkey, and how our sales team might look different here."

As Jongejan has been growing the team, she shares some key lessons she's learned along the way.

“...provide a really fantastic experience for candidates...”

CREATE ALIGNMENT ACROSS RECRUITING TEAMS

“One major lesson that I've seen is the need to be aligned across the recruiting team as well as the interview panel. So, having really clear expectations for what we're looking for in candidates, what are the 'needs to have' and 'nice to haves,' and making sure we're really clear on who is evaluating candidates for what part of those expectations.”

Jongejan says the team gathers feedback from the candidate's perspective by sending out surveys after the interview process. This helps align everyone involved in the interview process, coach and improve, and understand the candidate's experience.

Lastly, Jongejan discusses aspects that are critical for setting the tone for culture in an organization:

ASPECTS THAT ARE CRITICAL FOR SETTING THE TONE FOR CULTURE IN AN ORGANIZATION:

- 1 Having a really clear mission and values that the company looks to uphold
- 2 Have those values displayed from the leadership team down
- 3 Accountability, teamwork, and collaboration: not only driving towards your own goals but helping others reach their goals as well, ex - sharing best practices.

Angie
Jongejan

SOURCE Full Podcast: <https://www.pejorist.com/2019/08/ep-204-recruiting-in-a-highly-competitive-market/>

CONCLUSION:

We hope you found these techniques and advice valuable and informative.

We want to thank all of the sources above for providing thorough information and asking important questions.

We also want to thank all sales leaders for stepping up and sharing these insights with the sources which gave us the ability to compile this guide.

Thanks for reading!

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