Running a Drama-Free ~~Contact Center~~ Sales Floor

Written by CTM Marketing.

*Annotated by CTM Sales.

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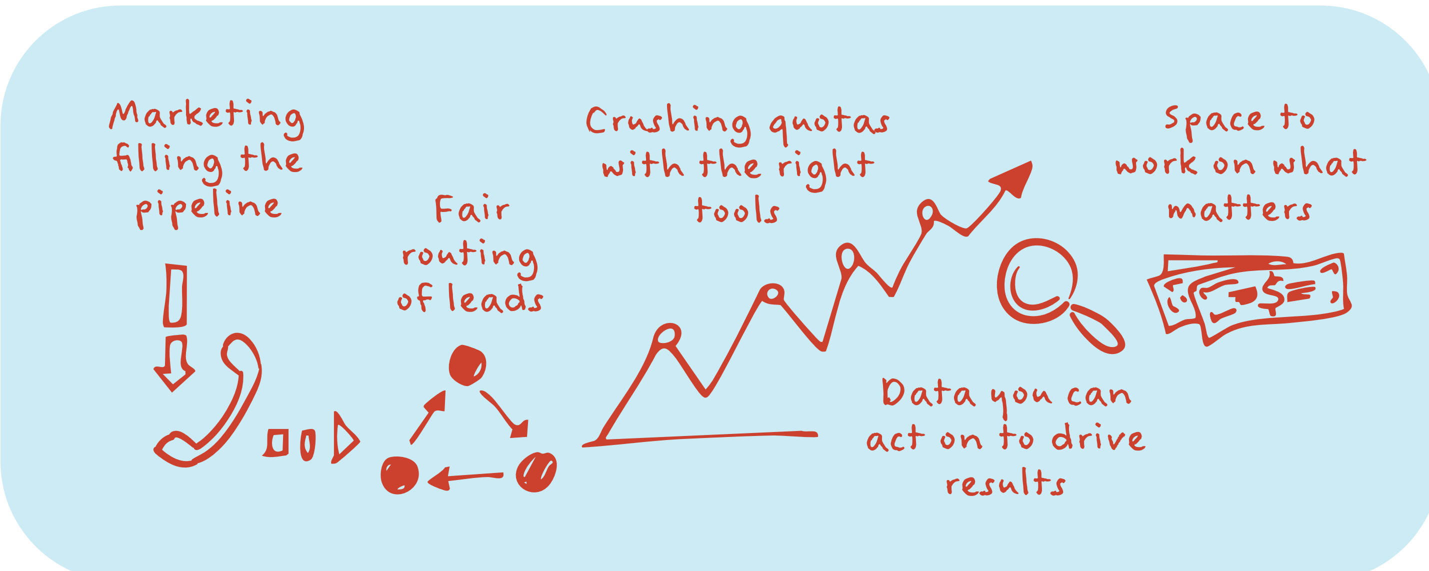
There are three weeks left in the quarter.

You're behind on quota, but it's within your reach. Everyone is fighting to get the last minute leads trickling in from Marketing. There's stress. There's grumbling. There's drama.

"leads" is typically Marketing language, while "opportunity" aligns more with Sales terminology — so I'd recommend including "opportunity" in the phrasing

A little bit of pressure can fuel a sales team, but constant drama isn't sustainable. To hit quotas and, more importantly, **bonuses**, you need to be (mostly) drama-free. What would that even look like?



Is a drama-free contact center a pipedream?
Let's see how you can pull it off.

Contents

Keep the Pipeline Full

Your marketing team is great.* They've got your back. But for whatever reason, at some point in the year, the sales pipeline will slow down to a crawl. Slow pipeline is the number one cause of contact center drama.

* this was definitely written by a marketing person. haha

Jokes aside, it's natural for the sales pipeline to hit slow periods during the year. And when that happens, it can strain how sales and marketing work together.

Marketing and sales alignment? Kiss it goodbye when the leads stop flowing. Low leads = low morale.

To keep your teams working together and feeling good, you need a healthy pipeline full of qualified leads.

Start with marketing

When you have an issue with pipes in the real world, you look for leaks.

It's the same here. Look for what campaigns are driving the junk leads that are driving your sales team crazy. Then, move away from the plumbing metaphor and double down on the successful campaigns. The ones getting your sales team to send celebratory GIFs. (The GIF theme this month is The Office)

Find and plug the leaks with:

1. Google Analytics (GA4): Have your marketing team look through your acquisition and engagement reports in GA4, broken down by source / medium, default channel grouping, and by campaign.

- Which ad sources aren't doing what's expected of them? Stop or scale back on those.
- Which pages are/aren't converting? Test copy and design changes to get conversion rates back up.
- WAIT - if you're a sales team, you're closing deals on the phone. Are those tracked in Google Analytics? If not, you're making budget and marketing mix decisions on incomplete data. Use a call tracking vendor with a Google Analytics integration and then repeat the above analysis.

2. Google Ads: Have your marketing team run another audit, this time on the conversions used in your Google Ads campaigns. Google Ads will optimize to whatever you tell it to optimize to. Junk in, junk out. Make sure you're not sending it junk.

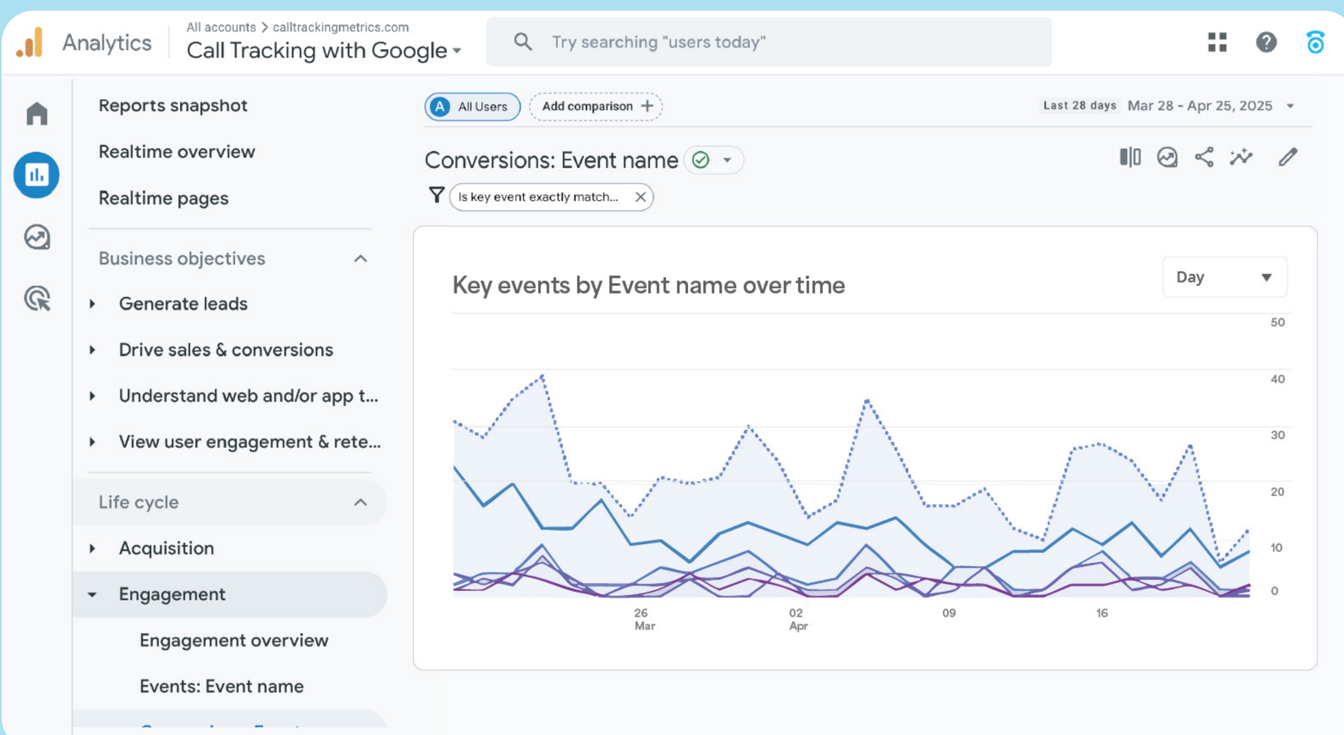
— Unless all form submissions and phone calls are great, you should send a more tightly defined "qualified lead" or purchase event to Google.

— "WAIT - we don't have a way to send a qualified phone lead to Google." You can use a key event from the call tracking vendor we recommended above, or make sure you have a call tracking vendor with a customizable Google Ads integration.

Should we just say CTM here? We could link to our Calendly.

Enough with marketing, let's get back to what our sales team can do to fill the pipeline. - THIS.

Tour the CTM Google Ads and Google Analytics integrations in our Interactive Walkthrough.



Build an Outbound Motion

ABC - Always Be Closing

If marketing's inbound approach is running at full speed and your team still has capacity, outbound is a great way to add opportunities to the pipeline.

Build your target list. Get help from your marketing team to make a list of companies that fit your ideal customer profile.

Research those organizations to know their structure, goals, and pain points inside and out. Identify the roles that make up your buyer group.

Set up your outreach cadence, sequence, motion, or any other word for how you'll message your list. Mix in email, LinkedIn, phone calls, and, if opted-in, SMS.

Launch, analyze, and iterate.

Personalize beyond merge tags

Outbound works best when it's personalized. Not just [job title] at [company name] personalized, but truly tailored to their current pain points. Without being creepy, you can do research on LinkedIn, or you can listen to phone calls and recorded demos from similar prospects and hear how your outbound target likely talks about their motivations and roadblocks.

Route Leads Fairly

An empty pipeline is the worst. An unfair distribution of leads to your team is a close second. When your team relies on commissions and lofty quotas, it can be brutal seeing a teammate get lead after lead while you wait patiently for your turn.

I'm less focused on "fair routing" and more getting leads to the right team members

Instead of turning your call center into Lord of the Flies, with every person for themselves, create harmony with clear routing.

Build a foundation with queues

Whatever your internal team structure is, your lead routing should facilitate that. Your reps might cover different regions, different deal sizes, or different industries. Your leads should get from marketing to the correct salesperson faster than you can say "MQL."

Queues offer a way to group your sales reps to minimize the number of transfers, hold time, and other things that your leads hate. And your reps get fair routing both within a queue and between queues if there's overlap.

Queue 1

[Region one]

Jerry
Elaine
George

Queue 2

[Region two]

Leslie
Ben
Jerry

Scenario 1: Call comes in from region one, it rings Jerry, Elaine, and George at the same time, who all race to answer it. Could create some drama. If your team is that competitive, using something like *round robin routing* keeps the peace.

Scenario 2: When Jerry is already on the phone with someone from region two, Elaine and George are ready to take the next caller. Everyone already on the phone in region one? Use region two as your backup queue to avoid missed calls.

TOOL SPOTLIGHT: SMART ROUTER

Bring it all together with the Smart Router.

The smart router uses "if/then" conditions to build a sophisticated workflow of routing for your calls. You might direct callers to the best fit rep based on the ad campaign they're responding to, previous call history, their location, caller ID details, or any number of factors unique to your account.

It's a feature we use at CTM. Office closings for holidays, emergency lines, and voice assistants during all-hands meetings are taken care of through our smart router.

We should plug VoiceAI for picking up inbound calls when we're unavailable.

Tools to crush quota

What's better for morale than a bunch of leads? Closing deals. The rush, the commission, the kudos GIFs in your team Slack channel. Hitting quotas and earning bonuses keep things incredibly drama-free, unless you count friendly competition to see who comes out on top this quarter.

No matter how seasoned you and your team are at selling, there's always room to improve close rates, days to close, and average deal sizes.

Sales coaching

On any given team,* there are things that are going well that everyone else should learn from. And there are things going so disastrously that everyone else should learn from them.

Finding those things, good and bad, and delivering new approaches is the heart of sales coaching. Sit in a room for a 1:1 and listen to a call recording together. It's a little awkward. But from the awkward comes growth.

The essential coaching toolkit:

— LIVE WHISPERS | when a rep needs a little nudge from a helpful voice in the sky

— CALL RECORDINGS | for those classic coaching sessions, cringing at the sound of your voice (It's ok, we all feel that way)

— TRANSCRIPTIONS | For a more silent performance analysis, review the written version and avoid voices altogether.

— CALL SCRIPTS | a roadmap to have all your reps answering questions like your best rep.

* Consider adding a point about the challenges of coaching and supporting remote employees —

More hands-on coaching and increased awareness of team members' activities are essential.

How can you tell the coaching is working?

For one, all the high fives. For a more objective approach, there's call scoring.

Two months free on annually billed plans at CTM!

How closely did the sales rep stick to the script, and did they remember to mention the current promo? *1-5 stars*. How ready to buy was the caller? Researching: *two stars*. Booked a demo: *four stars*. Signed up on the spot? *Five stars.*

Scores give you a place to restart your coaching.

— Review a one-star call that went way off script to course correct.

— Send the scores back to your CRM so marketing can optimize to five-star leads and stop giving you unqualified leads already!

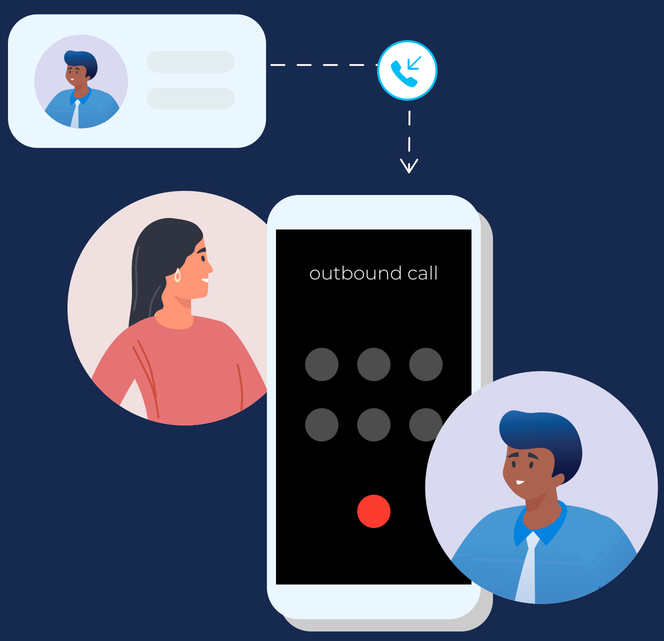
— Run an AI prompt on all the 3-star calls to find common objections, and game plan talking points to move those 3 stars to buy faster.

TOOL SPOTLIGHT: LEADREACTOR

Outbound dialing

Leads come in and an outbound phone call gets triggered as soon as there's a teammate available to take the call. No leads left waiting. And no agent downtime. Calls are made in the background and connected only when the lead answer, with advanced voicemail detection to leave personalized messages when not available.

Handle large lead lists, or ongoing inbound tasks with reporting to optimize the process and manage workforce performance.



Avoid burnout

A full pipeline, quarterly bonuses, and a fully-crushed quota mean nothing if reps are burning themselves out. Burn out is real and it derails all the good momentum built from sales coaching.

I'd consider focusing more on working smarter and prioritizing revenue driving activities over burnout.

The rush of the close can only keep your team going for so long. You need to avoid turnover. You need to avoid burnout.

Rule number one to avoid burning out your team: encourage them to take their paid time off. It's hard, we all want to just keep closing deals and earning commission. It's hard, but it's also healthy. Taking a short-term break is a long-term win. It's strategic.

<WARNING>
Our team will lose out on deals. Our close rates will suffer! Everyone must stay on the phone, even on vacation.

Scenario: Your top sales rep is going to Cancun. Take a breath. You've been preparing for this.

— You've already analyzed the past 12-months of calls and built a call script for the rest of your team to handle demos just like them.
— You're using queues so there are no calls reaching a dead end. Just eager sales reps ready to pick up and sell.

TOOL SPOTLIGHT: VOICEAI AGENTS

Missed calls are missed revenue.

You care about your team: You have a generous PTO policy and a flexible schedule. But missed calls could mean missed payroll. Even with overlapping queues, real-time team performance dashboards, and mobile features to accept calls in the field: missed calls will happen.

But not with VoiceAI assistants. They're always on. Trained on the same conversations you've used to build your high-performing call scripts.

After hours, teams out at conferences, and unexpected mid-day departure when your enterprise rep wins the lottery. Whatever the case (and I hope it's the lottery one!), Voice AI assistants can jump in to qualify, book, and route those calls.

No long hold times. And no missed calls. Keep the leads moving forward, not waiting.

Automate Your Way to Rep Happiness / automate to focus on high impact work

The Sales team likes to sell, but there are parts of the job that they don't like. They might even hate it. Avoid burnout and drama by automating the parts reps hate.

Data Entry - No more "can you update x please?"

— When you get off the phone, your CRM should be updated with a click of a button at most. A new lead created in Salesforce or an updated phone number for an existing contact in HubSpot.

— Need required fields to keep your Ops teams happy? Use an AI prompt to pull the data from the conversation instead of spending time afterwards.

AI that prevents burnout and helps reps do more with fewer resources is a game-changer for sales leaders.

Call Notes - No more "which integration did they say they wanted more details on?"

— Maybe your team enjoys pen and paper, but call recordings open up automated note taking. AI generated summaries for quick reference, automated tags and scores based on words and phrases spoken, and everything synced, including the recording, to your CRM.

Follow-Up - No more "I meant to check on that opp last week"

— Hop off a call, schedule a Salesforce task and hope you stay on top of your tasks list. Or, hop off a call and schedule an SMS check-in with your lead for 3 days later after their internal meeting to get buy-in, and add them to an outbound call list for when you log in to CTM on Tuesday.

Optional perks to avoid burnout

Brought to you directly from ChatGPT without editing, emoji and all.

Surprise Desk Drops or Mailers

Team Lunch Takeover

Midweek Pick-Me-Up Snacks

Ridiculous Awards Ceremony

Sales Karaoke or Lip Sync Battles

Field Trip Fridays

Juice Bar + Hype Hour

Drama-Free Sales is a Drama-Free Organization

The whole business relies on sales to continue being a business. With that kind of pressure it's easy to see why drama might peek its head inside your contact center. But with a little help from marketing, some coaching, and all the innovative tools you could ask for from a platform like CTM, the drama starts to fade away.

It just takes:
— Good people.
— Good management.
— Good tools.
— And good vacations. *Pending manager approval.

Your team is ready to sell. Don't let chaos get in the way. Get in touch to see how our Sales Engage plan is helping teams like yours keep their cool.

View Sales Engage plan

Cut to the chase: book a demo with my team so we can answer everything they didn't in this guide.

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