



THE REMOTE SALES TEAM PLAYBOOK

CONDENSED VERSION

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Remote sales has been a growing trend for several years, although the trend truly took flight during the coronavirus pandemic. Whether your sales team is currently making the transition to remote by force or you've been moving towards remote for some time, this checklist is built to give you the essentials necessary to build, motivate, refine, and empower your remote sales team.

This checklist gives answers to 7 key questions about remote sales and can be used as the framework for a remote sales team that knows how to crush it.





What is remote sales?

Remote sales is the same as selling in-office, except everything is done in a separate physical location from the person you're selling to (and your team).

The main difference: communication. Digital communication skills are essential to remote salespeople.

When building your own virtual sales program, there are three key things to consider:

- Set up processes for your team to keep selling remotely
- Build a foundation for regular communication with your team
- Define key technology for remote selling and WFH security

How do you build a remote sales team?

Remote sales hiring requires you to dig deeper into the qualities, skills, experience, and motivation of the people you're interviewing.

Here are 6 steps to successfully hire and build a remote sales team

- **Define key requirements for a remote sales team**

This may include some remote work experience, the right motivations for going remote, as well as a good remote work setup.

- **Hire proactively, not reactively**

Plan ahead to know what roles you'll need to fill as your company expands. Don't wait until there is an urgent need to hire someone.

- **Hire experienced sales professionals**

Because at the end of the day, these are people you can trust to get the job done.

- **Hire for remote culture fit and communication skills**

Coachability, good communication skills, ownership, and accountability are all essential remote qualities.

- **Define a scoring system for candidates**

Like lead scoring, define how important these different sets of qualities, skills, and experience are to you.

- **Set up a more rigorous hiring process**

This might include filling out an online form to help you set apart the best remote candidates, doing several video interviews, completing a test project, and doing some remote sales roleplay.

- **Keep a written record of your processes**

Help new hires to onboard faster by keeping information about your target audience, customer profiles, sales cycles and process, and lead generation tactics written down.

Read more in Chapter 1 of The Remote Sales Team Playbook. →

How can you effectively manage and lead a remote sales team?

Remote sales managers need to maintain their sales process and provide clear leadership to their team.

To manage your virtual sales process:

- **Set clear (and reasonable) performance goals**

Having quota goals is good, but building a set of clear performance and sales activity goals helps reps stay on top of the actions that push more sales.

- **Define the stages and activities of your virtual sales process**

And be prepared to adapt and refine them as virtual sales continues to shift and expand.

- **Decide on the remote sales KPIs that impact the success of your team**

These sales KPIs may include activities per rep, pipeline

conversion rates, average conversion time, and sales by lead source.

- **Give your sales team better visibility into buyer activity and responses**

Encourage discussion among the team about the reactions they receive on calls or in emails.

- **Help your remote sales team focus their efforts**

Sales managers help reps manage their time by prioritizing the right leads and regularly cleaning up the data stored in their CRM.

- **Train based on a solid foundation that builds autonomy**

Instead of promoting a 'sales activity of the month', learn from the data what's working and what isn't, then train based on that foundational framework.

For better remote leadership, try these tips:

- Build an atmosphere of accountability
- Give your team as much transparency as possible
- Conduct regular 1:1s with each team member
- Celebrate goals attained and milestones achieved

Read more in Chapter 2 of The Remote Sales Team Playbook. →



What do sales coaching and training look like in a remote setting?

Keeping a remote sales team engaged involves regularly interacting with them, building a predictable process for success, and setting up coaching and training that builds their skills and helps motivate them to succeed.

“Have clear expectations as to what their day-to-day activities should look like, but give flexibility in their schedule as long as they’re making an impact.”

James Urie of Close

“ Realize your reps are people. You can't take a one-size-fits-all approach to leadership in a remote setting.

Amy Volas of Avenue Talent Partners

“ Make sure you are consistent in your coaching but inconsistent in how you go about your coaching.

Julian Marcuzzi of Predictable Revenue

“ I use call coaching tools that allow me to listen or participate in my team's calls in real-time. Being able to coach someone as the call is happening is a game-changer.

Nick Persico of Close

“ Start sales meetings with an informal question to prompt a more collaborative brainstorming session.

Dave Tuttle of ZipRecruiter

“ Set up office hours so your team can approach you outside of the 1:1 or team standup.

Amy Volas of Avenue Talent Partners

“ As a leader, decide what needs to be handled 1:1, what can be done with 4-5, and what needs to be communicated 1-30.

Armand Farrokh of Pave

“ Reach out to each person individually every day, even if it's just to ask how things are going.

Nick Persico of Close

“ Become a better facilitator instead of a director or a teacher. Build a culture where your team knows that your meetings are about team learning, it's a priority every week.

Rene Zamora of Sales Manager Now

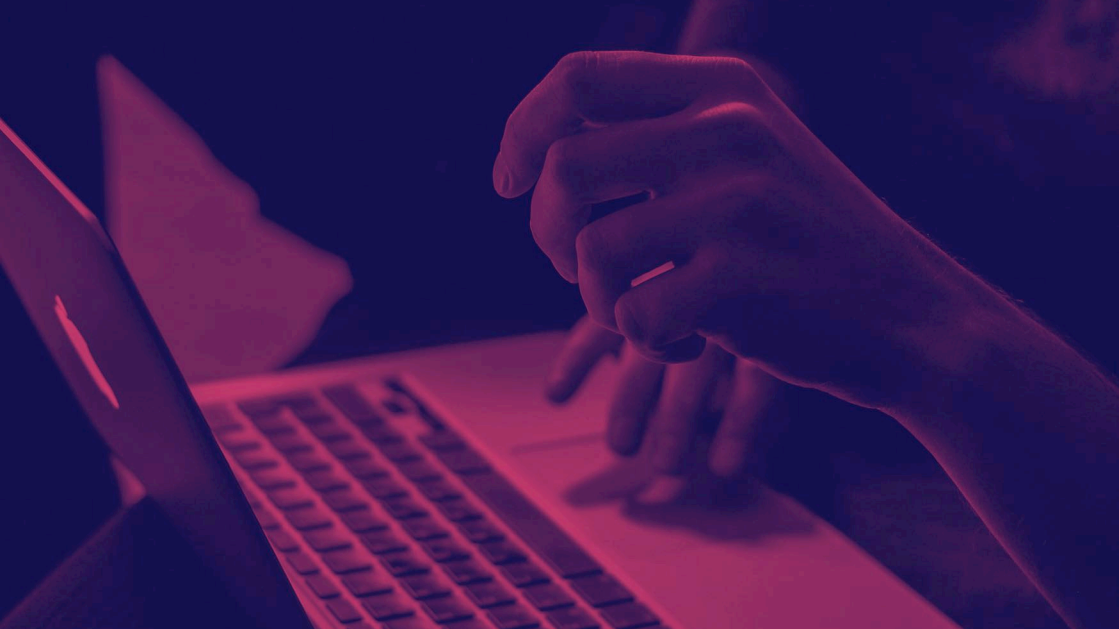
“ Implement CRM with your team and continue to tweak over time. Don't just build something and roll it out.

Rebecca Twomey of Party Center Software

“ To build predictable revenue, you need predictability in your team and in everything that you do.

Armand Farrokh of Pave

Read more in Chapter 3 of The Remote Sales Team Playbook. →



What are the top remote sales tools?

To truly empower your remote sales team, they'll need to have the right tools to get the job done.

Best remote sales CRMs

- Close
- Pipedrive
- SalesTable

Tools for remote prospecting:

- LeadFuze

- Profiler
- LinkedIn Sales Navigator

Top sales engagement platforms for remote teams

- Outreach
- Mailshake
- Drift

Best platforms for remote sales enablement

- Showpad
- PandaDoc
- Process Street

Remote sales team building tools

- Ambition
- Donut
- Arcade

Best analytics tools for remote teams

- Gong
- Geckoboard

- Clari

Top collaboration tools

- Google Workspace
- Miro
- Front

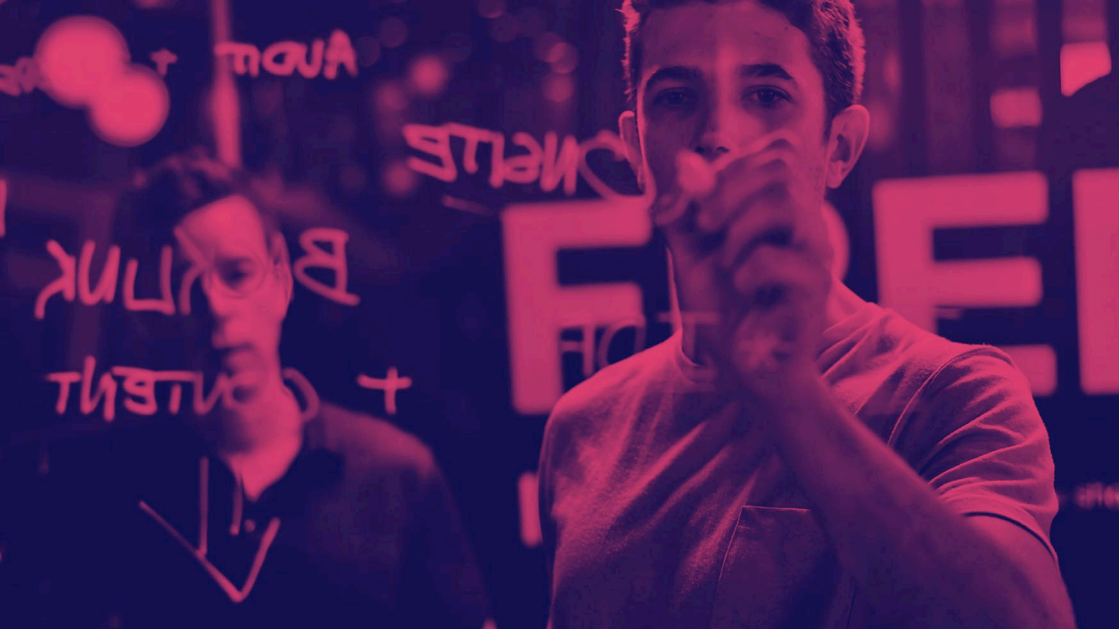
Communication tools for remote sales teams

- Zoom
- Twist
- Loom

Best project management tools

- Asana
- Trello
- Toggl

For the complete list of tools, with additional context on what makes these tools a great fit for remote sales teams, see the full list in Chapter 4 of The Remote Sales Team Playbook. →



What are some remote sales best practices?

Sales reps need to find different ways to build trust and develop relationships with prospects when they can't meet with them face-to-face. Also, sales managers need to work harder to have context on the current status of their team, as well as their pipeline. How can each of these roles succeed in a remote setting?

Tips for remote sales reps to keep crushing it from home

- Be relentless with follow-up
- Make recordings of all your video meetings

- Take advantage of cloud collaboration
- Make eye contact on video calls by placing your camera correctly
- Be aware of time zones when communicating with prospects
- Start your day with the most difficult tasks
- Find creative ways to add personality to your communication (such as adding a personalized video)
- Carve out time at the end of each day to plan for the next
- Mute notifications during your focus time
- Make time to level-up your skills
- Learn how to manage-up
- Learn proactively

Tips for sales leaders managing virtual sales teams

- Promote separation of work and personal life
- Keep a tidy (virtual) workspace
- Secure your data
- Be structured, but also be prepared to adapt
- Do proactive wellness checks
- Document your remote work policies
- Focus on results, not on hours spent
- Don't expect your team to work 9-5
- Set up a virtual watercooler

- Encourage your team to set 'focus time' blocks in their calendar
- Set up fast hand-offs to the right team members
- Leverage integrations and automations
- Encourage your team to celebrate each other's wins

Read more in Chapter 5 of The Remote Sales Team Playbook. →

Where can I get more information about remote sales?

There are plenty of resources available now for remote sales reps and managers to improve their skills, build better communication, and ultimately close more deals.

For a constantly updated list of articles, guides, books, and blog posts, visit Chapter 6 of the Remote Sales Guide

Level-up your remote sales skills

Building relationships, setting appointments, giving demos, and closing deals are all aspects of the sales process, whether you're in-office or working remotely.

So, does the sales process change when selling remotely? While the general process of getting leads and persuading them to purchase may not change, the specific strategies you use will shift based on the fact that all communication is done digitally.

Sales teams need more visibility into their prospects and pipeline to know which actions will have the most impact. And sales managers need more visibility into what's happening with their remote sales teams, without the convenience of walking onto the sales floor to get a feel for the situation.

Remote sales reps and managers must rely on the right tools to give them the visibility they need to see what's going on, as well as the ability to take that information and turn it into something they can act on.

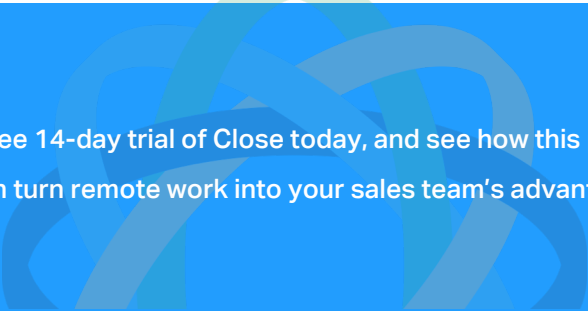
That's exactly what Close CRM does for remote sales teams around the world.

“ *Close was a game-changer for our sales process. I immediately saved hours of time by automating email follow-ups with Email Sequences and closed more deals in 5 days than I ever had in a given month!*

Tim Griffin, CEO of Cloosiv

“ *So much friendlier and more streamlined than many CRMs. It has a lot of flexibility for power users, but not at the cost of regular users' ability to just get work done. The new reporting is also great, way more customizable and more visually clear and informative at the same time. Keep up the great work!*

Jackson Eardley, AE at Badger Maps



Start your free 14-day trial of Close today, and see how this powerhouse CRM can turn remote work into your sales team's advantage. →