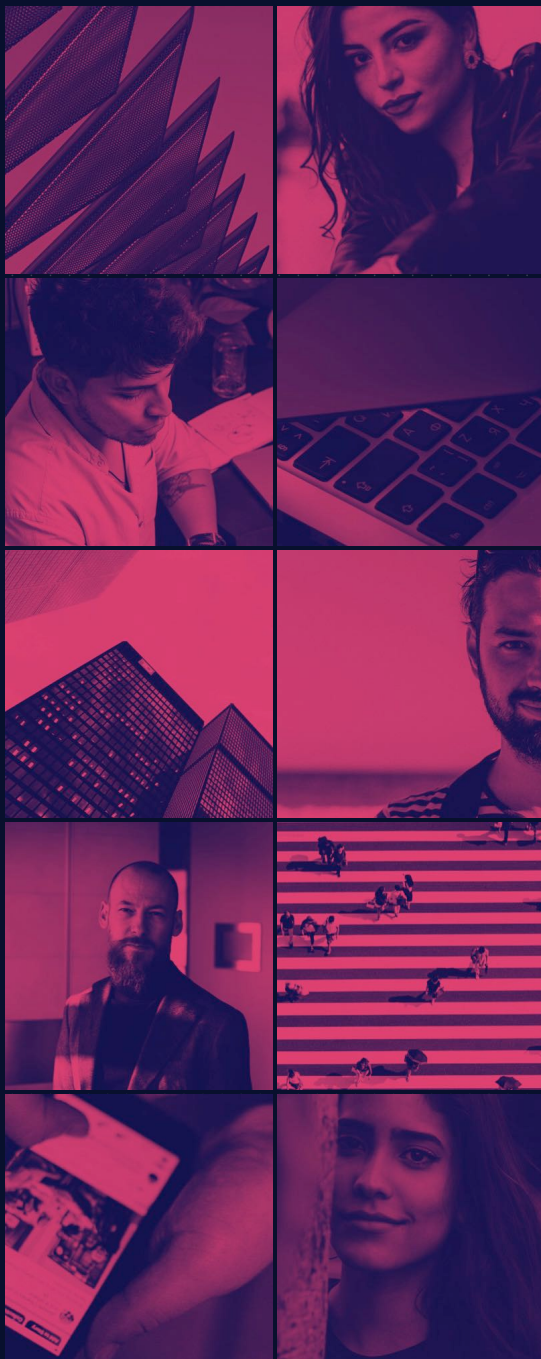




THE
REMOTE
SALES TEAM
PLAYBOOK





The Remote Sales Team Playbook

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Introduction

Remote sales is changing the world of selling for the better, but it comes with its own unique set of challenges. There's something magic about the energy on the sales floor, the buzz a tribe of reps creates. How do you light that spark while sitting alone in your room in front of your laptop?

While WFH became the theme of 2020, this trend towards remote work certainly isn't something new. In fact, before the pandemic, remote work had already increased by 159% in just 12 years.

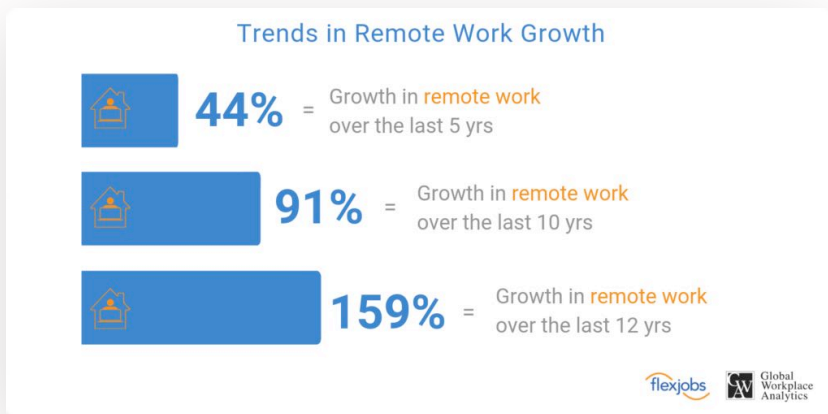


Image Credit: FlexJobs.com

In the years prior to 2020 (the year everybody and their parents started using Zoom on a daily basis), more and more salespeople were trading in the hustle of the in-office sales floor for a quiet home office with their own private espresso machine and a happy pet beside their desk.

Of course, the coronavirus pandemic turned this trend into a necessity for many. A study by Gartner at the end of March 2020 found that **88% of organizations were encouraging or requiring their employees to work from home**. In the months that followed, big-name brands like Facebook, Twitter, Square, Slack, Shopify, Upwork, and more announced their shift towards a remote-first working environment.

Is your sales team remote in 2020? Were you already doing remote sales before the pandemic hit? Are you the **new sales manager** in charge of guiding and training a remote sales team?

If so, then this guide is for you, and here's what you're about to discover in each chapter:

Chapter 1 — How to build a remote sales team: 7-step process for success

Learn how to define your key requirements for remote sales reps, hire for culture fit, and set up processes for hiring that you can repeat and scale.

Chapter 2 — Managing sales teams remotely: 6 ways to keep your reps closing

Sales managers need to set the kind of goals their reps can actually reach. Learn why performance goals work, how to set clear KPIs, as well tips on building an atmosphere of accountability and autonomy in your sales team.

Chapter 3 — Expert remote sales coaching tips + sales games for remote teams

Maintaining high-energy in a remote setting may be difficult, but not impossible. Get proven advice from today's top sales managers on

setting clear expectations, making 1:1s and team meetings more productive, enabling peer learning for your team, and more.

Chapter 4 — 52 top remote sales tools for your team to absolutely crush it

A remote team's tool stack should empower them to do their jobs better, not slow them down. Get a glimpse of today's top tools for customer relationship management, prospecting, enablement, communication, and more.

Chapter 5 — 41 remote sales tips for reps and managers to get the job done

Learn proprietary tips from a company that's been doing remote sales since 2014. This big list of tips includes ideas for remote sales reps as well as sales leadership.

Chapter 6 — 25 remote sales resources to close deals and manage teams better

Companies around the world are succeeding at remote sales, and so can yours. For even more great advice on going (and staying) remote, check out this list of extra resources.

What is remote sales?

What is remote sales not? It's not binge-watching Netflix while you casually send a couple of emails. It's not perusing the internet for information on the latest Apple event while you listen to your boss chatter on an all-hands meeting via Zoom.

Remote sales is hard work: it requires just as much skill, motivation, energy, and focus as normal selling. And most virtual salespeople are absolutely killing it. (Yeah, you know who you are!)

Taking sales work remote was not only done for the convenience of sales reps, but also as a response to how buyers prefer to interact with reps. Digital communication is part of our everyday lives, and thus the buying process for both individuals and companies has changed. So, virtual selling is simply a byproduct of the environment we live in.

How does virtual selling work?

So you get up in the morning and... what? Here are some quick answers to your top questions about virtual selling:

What does a remote sales rep's job look like?

Basically, it's very similar to the job of an in-office sales rep.

Remote salespeople still need to go through the basics of the sales process, including:

- **Generating leads**
- **Qualifying prospects** and discovering pain points and challenges
- Developing a truly **powerful sales pitch**
- Speaking directly with **internal champions and decision-makers**
- Conducting meetings or **product demos**
- **Negotiating terms**
- Getting a contract signed

Remote sales reps still need to build relationships with their prospects, understand their wants and needs, and deliver a solution that actually helps them.

What makes virtual sales teams different from in-office teams?

The main difference is the means of communication. While in-office sales teams have the ability to quickly chat with their coworkers or jump into their car for an in-person meeting with a customer, remote sales teams are separated physically from each other and the people they're selling to.

This sales team structure has both advantages and disadvantages. But when the right strategies and tools are in place, the sales process can run just as smoothly in a remote setting as it would in the office. A remote salesperson just needs to be willing to build their digital communication skills, which is something we're going to teach you in this guide.

What to consider when building a virtual sales program

Here at Close, we've been fully remote as a company since 2014, so we've been through the process of discovering how to make a remote team successful, and how to continue to close deals from home.

Throughout this guide, remote sales leaders will get an inside peek at the methods and strategies we've been using for years to make virtual selling work for us. From setting up your remote team, **hiring sales reps remotely**, virtual coaching, and **motivating your team**, we've got all the tips you need

to become a successful remote leader (and avoid becoming a micromanager).

That said, here are the main steps new remote sales leaders need to focus on:

Step 1. Set up processes for your team to keep selling remotely

Your **sales process** is unique to your business and your customers. However, if you've been tasked to set up or transition a remote sales team, you'll need to adapt these processes to virtual selling.

For example, what will replace your in-person meetings with prospects and customers? How will product demos be run? What will be the standard process for implementing your solution remotely? At what stage should reps switch from email contact to a phone call or video meeting? How will you as team leader stay up-to-date with what's happening in the pipeline and with each deal?

Setting up a specific virtual sales process will help your team stay focused and productive throughout the workday. (Skip ahead to Chapter 2 now to learn more about leading and managing your sales team remotely.)

Step 2. Build a foundation for regular communication with your team

In-office communication is synchronous: you can speak face-to-face with your reps and find out what's going on. In-office communication can

also be spontaneous: a quick pop-in to a rep's cubicle can get you the answer to a question in less than 5 minutes.

Remote communication, on the other hand, must be set up and planned and is often asynchronous.

That's why it's essential for sales leaders to set up a solid foundation for good communication. In fact, **we like to use the term 'over-communication'**.

So, new remote sales managers need to consider questions such as:

What process will your reps use for in-team communication?

How will you decide whether a topic needs to be discussed in a meeting, in an email thread, or on Slack?

How often will you meet with the whole team and with individual reps?

When your process for internal communication runs smoothly, reps can get answers to their questions and managers have a clear view of what's happening on the team and in the **pipeline**.

Step 3. Define key technology for remote selling and WFH security

Tech and tools are a huge part of remote sales. Whether it's the tech for a virtual sales meeting, VOIP services, internal communication tools, or **reporting and dashboards to help you measure sales KPIs**, it's the job of sales leadership to discover and implement the right tools for their team.

Tech is a big world, and there are more sales tools geared towards remote selling now than ever before. So, virtual selling leaders need to

clearly define what tools are necessary for their remote team based on the needs of the individuals as well as their unique sales process.

Are you ready to build your digital selling skills, learn how to manage remotely, and build a high-performing remote sales team?

Then let's dive in.

ONE

How to build a remote sales team: 7-step process for success

Building a remote sales team presents its own unique challenges to **sales managers** and founders.

What skills should a remote salesperson have? How do you screen for the right qualities and values? What should the **hiring process** look like for a remote sales team? How do you know when you've found 'the one'?

When your virtual sales team functions as a group, builds their skills collaboratively, and closes deals like there's no tomorrow, you know you've made the right hires.

But, how do you get to that point?





How to build a remote sales team in 6 easy steps

Building a sales team from the ground up takes time and skill, especially for new startups.

However, building a remote sales team requires you to dig even deeper into the qualities, skills, and experience that you expect from candidates.

How can you build a remote sales team? How do you redefine the hiring process for remote and decide on the best candidate?



Psst... Looking for specific tips to start scaling your startup sales team from 0 to 25 reps? Download the [Sales Hiring Playbook](#) for tips on recruiting,

interviewing, hiring, and onboarding the best reps for your team. Step 1: Define your key requirements for a remote sales team

When you set out to hire new sales reps, the first thing you need to think about is: What requirements do we list in the job post?

This is where a lot of remote hiring processes go askew. Many companies make a lengthy list of 'requirements' that have little to do with success in this particular role.

Here's some novel hiring advice from sales expert and consultant **Jim Keenan**:

“ *Companies need to **ask the people in the actual position to create the hiring criteria** because they know exactly what skills they leverage to be successful. Then look for those skills. Hiring managers need to take an audit of the actual skills and capabilities the job requires to be kickass at it and then hire for those traits.*

So, talk to the person (or people) in your company currently responsible for sales. What would they define as required skills to succeed in their role?

Next, think about the requirements you have that are specific to a remote setting. For example: Do you need reps to be available during specific hours of the day in a certain time zone?

Finally, it's essential to think about what we call 'remote fit'. Basically, this involves three main ideas:

- 1. Having at least some remote work experience:** Whether they are moving from a fully remote position, have freelanced remotely, or were working some days per week from home, it's good for a remote sales candidate to have some experience working from home.
- 2. Diving into remote work with the right motivations:** You don't want to be the company someone uses to experiment with remote work and set up a completely different lifestyle. Understand how thoughtful this candidate has been in choosing the remote work life.
- 3. Having their own remote work setup:** Regardless of whether someone has worked remotely, they need to have the discipline and processes in place to start working for you remotely. In the hiring process, trying to understand what remote work looks like for this candidate.

Step 2: Hire proactively, not reactively

Reactive hiring is the result of poor planning and an urgent need to fill a role.

Here's what normally happens: The sales hire isn't a good fit for the role, and ends up costing you much more or failing completely, meaning you'll need to start the hiring process all over again.

To avoid this mistake, hire proactively.

Whether you're a startup founder, sales manager, or VP of sales, it's your job to understand your current needs and forecast future needs.

A **sales director must forecast** to see how much revenue and profit are coming in this quarter or this year, as well as forecasting demand for what you're selling. These forecasts will also tell you how much of a workload will be coming up for your current sales team and whether you'll need to start hiring in the near future. **Check out our collection of sales forecasting templates.**

So, when making your sales plans, keep in mind the capacity of your current team and forecast when you'll need to start hiring more sales reps. Then, you'll be able to start the hiring process early and get the right talent, rather than hiring in a panic and grabbing the first person who will say yes.

Step 3: Hire experienced sales professionals

One question that almost all newly remote sales managers ask me is: How do I know if my people are actually working?

Here's the answer: Hire people you can trust.

On a remote sales team, managers can't be constantly on the backs of their reps, looking over their shoulders to make sure they're doing things right. You need to be able to lead without micromanaging.

That's why you want to hire salespeople who have some sales experience, preferably at least one year.

These people have a strong understanding of what makes a good sales professional. They're more mature, have a strong track record of being disciplined, and are consistent with their work.

You want to hire go-getters. They will **dominate prospecting, following up,** solving problems, and thinking outside the box to get the deal closed.

Hiring a more experienced rep also shortens the onboarding process, since you won't need to train them in specific sales skills.

All this said, there is an exception to be made. If you're a fledgling, bootstrapped startup and can't afford to hire seasoned sales reps, you can try to take a leap of faith and hire inexperienced salespeople. Check out our **sales hiring guide for startups** for a basic hiring framework. But realize that you'll have to be a lot more involved in the sales process.

In the end, it will depend more on you as the manager: How much time and energy are you willing to put into making this sales team top-notch?

Step 4: Hire for culture fit and communication skills

One of our core company values at Close is: Build a house you want to live in.

Your business is a home for the people who work there. Especially in a remote setting, it's important to get culture fit right. So, define the values your company wants to promote internally and hire for the right fit.

Of course, variety and diversity in culture, background, and personality are important on a sales team. That said, here are three qualities you must look for in a remote sales candidate:

First, coachability. The right candidate isn't afraid of taking feedback on their work. They're not only eager to get their paycheck every month, but

also to improve their **sales skills**. This makes them humble enough to take counsel and agile enough to use that counsel in their day-to-day work.

Second, communication. When your team is working remotely, **asynchronous communication** via email and other methods is commonplace. During the hiring process, take note of how well candidates communicate with you in written form.

Yes, we know that salespeople will generally be speaking on the phone or via videoconferencing. But their communication with the team and with you as the sales manager will not always be spoken. Make sure the candidate can express themselves well in written form, and that they can take in and apply written instructions.

Third, ownership and accountability. Does this candidate own up to their mistakes, or are they the type of salesperson who comes into an interview telling you they've never missed quota? Someone who is willing to admit their failures and work to improve themselves is a salesperson who will succeed.

Says **Adam Kay, VP of Sales at Paddle**: "It's those sales reps that come into an interview and say: 'I missed Q4, but let me tell you why. Let me tell you what I did to make sure that that's not going to happen again'. We all miss quotas, we all miss deals. If I can take accountability for my development, for my learnings, and for my failings, then that shows me that they've got an open mind to work in this collaborative environment I'm trying to build."

But let's face it: in an interview, how do you encourage a candidate to be open and honest about their mistakes?

Simply put, if you expect honesty, you must give honesty. Don't exaggerate the role or the company. If you expect the person applying for a job to tell you a real, no-BS weakness about themselves, **lead by revealing a real negative about your own company first**. Be real with your sales candidate, and they'll reciprocate.

Step 5: Define a scoring system for candidates

Many times in the hiring process, you come up with several candidates who are equally qualified for the role.

So, how do you decide who to offer the role to?

As you define essential qualities, skills, and experience, set up a scoring system to define top candidates. (If you've ever done **lead scoring**, you'll understand how this works.) This is an exercise you can do with your team or with anyone else who is directly involved in the hiring process or final decision.

For example, having some remote work experience can add 20 points to a candidate's score, plus an additional 10 points for every year of experience. Then, every year of sales experience adds another 10 points, while having the right culture fit gives them another 40 points.

Set up your scoring system based on the qualities, experience, and values that matter most to you and your team. Then, you'll end up with a candidate that's the best of the best, plus several other top choices. Save these top candidates in case your first choice doesn't accept, or **keep in touch with them** so you can contact them down the road when you're expanding your sales team again.

Step 6: Set up a more rigorous hiring process

Since remote hiring doesn't give you all the

Remote hiring sales reps is definitely harder than doing it in person. When you're face to face with a candidate in the room, you pick up on non-verbal clues and will be able to get a sense for who this person really is much faster than you will be able to do when communicating with them via email and video calls. That's why the remote hiring process should be a bit more rigorous. This will show you which candidates really fit your company and team without the advantage of meeting them in person.

Start with an online form where candidates answer specific questions and attach their resume.

INBOUND ACCOUNT EXECUTIVE

What was the most difficult sales objection you've ever faced? How did you overcome the objection? *

In your current sales role, what's expected of you in terms of activity? *

Describe your experience selling SaaS products. *

Remember that a stellar resume doesn't always equal the best candidate: Even their answers to your preliminary questions will tell you a lot about their personality, communication style, and eagerness for the job.

Next, pick the best candidates to go through the interview process. To build a remote sales team that collaborates well, it's important for candidates to click with those they'll be working with. So, a remote hiring process will normally include multiple **interviews** with several people on the team, including the hiring manager, a trusted team member, and possibly a company exec.

Of course, all sales hires must go through a sales roleplay. Have your candidates sell you something, whether it's your product or something they've sold in the past. This is a true test of their skills as a salesperson and will tell you much more than their resume can.

Finally, remote sales hiring processes normally include a take-home project. This **hiring homework** will test their skills off-camera and will give you a good idea of how well they work when they're on their own. For example, you could have them write a cold email to a potential prospect.

Step 7: Keep a written record of your processes

The potential for chaos grows exponentially in a remote setting.

Since remote work usually equals less communication than an in-office setting, it's even more important to keep everything written down.

Information about your target audience, **ideal customer profiles**, sales process, sales cycles, **lead generation tactics**, and more may be common knowledge to the rest of your team or company. But new hires are

coming in with no information and no background: And you can't expect them to just wing it.

That's why keeping a written record of everything is essential to building a remote sales team. When your processes are well-documented, new hires will be able to quickly catch up and jump into the process alongside the rest of their team.



Pro tip: Want to get a headstart on creating this documentation for new hires?

Download the [Sales Enablement Toolkit](#) for 8 customizable templates, include cold emails, competitor comparisons, battle cards, sales scripts, and more!

Building a virtual sales team checklist: things to consider

If you're looking for the TL;DR version of how to hire a remote sales team, here's a quick checklist you can refer back to and set up a more successful hiring process:

- **Write a list of hiring criteria alongside people who are currently in this position:** Current sales team members have a clearer picture of what skills, experience, and qualities are necessary for success in their role.
- **Ask your A-Players to help you recruit top talent:** Your best salespeople probably know other top salespeople. Use your team to help you find top talent, and see if you can steal them away for your team.

- **List up to 5 main qualities to fit your company culture:** These can include essential values that are part of your company culture, as well as essential remote qualities such as self-discipline, accountability, or communication skills.
- **Identify red flags to watch out for:** Knowing what qualities you want can also help you define what you don't want. Talk to your team to set a list of red flags to look out for when talking to remote sales candidates
- **Understand the experience needed for each sales role hire:** Each sales role requires a different level of experience. Think about what you expect from a particular role, and understand how much sales experience they must have to fit your current (and future) sales needs.
- **Think about the questions you want to ask their references:** Don't waste precious time with the candidate's references chatting about general impressions. Explain the role you're hiring for, and ask specific questions about the candidate's competencies, such as: Were they accountable in performing tasks? Did they get along well with management and coworkers? How did they handle criticism?
- **Decide how you will set up your roleplay sales situation**
remotely: Adapt your sales roleplay to your own unique sales process. Whether that means roleplaying a **product demo** over Zoom or making a cold call, this will show you not only how well the rep sells, but also how well they know the tools they'll be using in the virtual sales process.

- **Define who has key decision-making power for the hire:** Know in advance who has a say in the hiring decision. Then, work with those people to develop your candidate scoring system, and speak together during the process to discuss the candidates that are being interviewed.

5 advanced strategies for building a killer remote sales team

Want to take your virtual sales team up a notch? Here are 5 methods you can use to level-up your sales team and make remote an advantage.

1. Set clear expectations

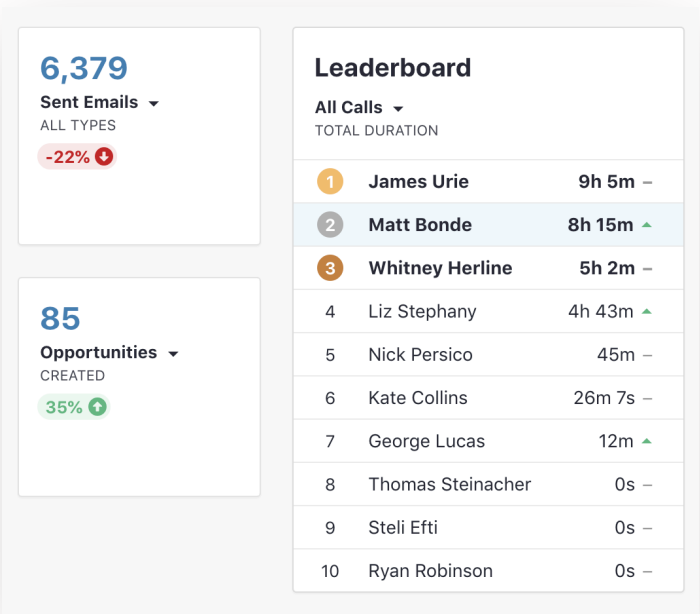
Why you have to do this for remote sales: When your sales team knows what is expected from them, they are more likely to deliver.

People can learn a lot from context.

As a sales leader, you need to be explicit about what the remote worker must bring forward. The parameters, details, and details of each task must be clear enough that everybody knows what needs to happen.

A poll of German workers found that when managers set expectations, held employees accountable for meeting them, and responded quickly when team members needed help, the workers took more initiative and had better performance.

Expectations should be about sales quotas and processes. You need to keep track of and monitor your internal sales goals. As a sales leader, you need to use a **sales leaderboard** to have an understanding of the activity going on and if expectations are being met.



Without clear expectations, things can get complicated. There is no easy way to measure success and evaluate team performance, without agreed-upon standards.

2. Promote employee engagement

Why you have to do this for remote sales: Virtual sales teams may feel disengaged due to the distance, so managers must work harder to promote engagement on their teams.

It can be common for remote sales workers to feel less engaged and disconnected from your company since they are not in a traditional office or with a group of colleagues. This can harm their morale and productivity. And ultimately, maintaining company morale is one of the cornerstones of high-performing sales teams.

You might want to consider implementing a chat channel for your sales team. This tactic will mimic the idea of having a “gong bell” in the office that would get banged when a deal is closed. Instead, the channel would put a notification in the channel every time a sale is made.



Close Bot APP 2:10 PM

Woohoo! A new deal just closed 🎉

Lead: Bluth Company (Sample Lead)

Contact: contactn name

Value: \$3000.0

Won by: Bryan Helmig

[View this customer in Close](#)

Let's celebrate with a gif party in this thread!

Congratulate each other across the sales team in your team chat. Consider sharing insight behind the sale, such as sharing any challenges or lessons learned, so your colleagues can learn from it.

⚡ *Pro tip: Want to set up automated celebration messages for each new deal, call, or demo? **Integrate Close CRM with Slack** to get automated messages like the one above and celebrate with your team.*

Consider encouraging pods. This involves two sales reps working together (the best and worst of the team) to try to reach their quota. The pod with the best result gets a prize. With this, it can help encourage more engagement across the sales team.

When your remote team cares about what they do, they are likely to provide excellent work because they are happy and engaged.

Companies have an opportunity to boost their employees' experience into one that allows them to feel engaged.

3. Provide the right tools

Why you have to do this for remote sales: Sales leaders need to equip remote sales teams with the tools necessary to help them be successful.

To make it easier for their remote employees to have a flexible and stress-free environment, businesses are incorporating tools to help replace the office touch with technology.

For example, having a **CRM** is critical for sales teams to **follow up with leads** and for leaders to track their progress. A CRM allows remote teams to update it with prospects, leads, and existing clients as often as needed.

A remote sales-friendly CRM to stay on top of your work and connect with your team.

You want to familiarize yourself with a set of tools your team can use to help become more productive and accomplish their work on time. These tools cover all the bases a remote team needs. From remote chat to project management to video conferencing to cloud storage, there are so many options out there.

Many of these tools are essential to good remote work. They can make your work more transparent and available to your remote team at any time.



Pro tip: Want to learn about our top recommendations for remote sales tools? Jump ahead to Chapter 4 to see how high-performing sales teams are using tech to close more deals, stay connected, and motivate each other to perform better.

4. Be a collaborative leader

Why you have to do this for remote sales: Collaboration, rather than micro-managing, is a way to win new hires over and keep them eager and excited for work.

Remote sales teams should be led. As a collaborative leader, you work to build a team that puts their all into the job. Encourage your reps to speak up with their own ideas, test new ways of selling or **pitching**, and prove why certain processes or methods work better than others.

Being a collaborative leader also involves talking to your reps when creating new sales processes, building better pitches, updating your ideal customer profiles, and more. Involving your virtual sales team on different projects builds a more cooperative spirit on the team.



Sara Parras 10:55 AM

🎉 Please join me in welcoming @Zoe Maxwell to the Marketing Team!
👋 She's our very first Advertising Operations Coordinator and will support the Performance Marketing team. She joins us most recently from Nakatomi Systems.

Some fun facts about Zoe:

- She was born in Barbados 🇧🇩, but has spent a majority of her life in California 🇺🇸
- Zoe enjoys rock climbing 🧗 and is belay certified at Planet Granite SF
- She comes from a big family! She has a total of 6 siblings!

YAY Welcome Zoe! YAY



Message #yay



5. Excel at onboarding

Why you have to do this for remote sales: You spend a great amount of time hiring A-players, but spending at least double that amount of time onboarding them is really integrate them into your team and help them do a great job.

In-office, you can walk new hires around the sales floor, introduce them to whoever you meet in the halls, make plans to grab lunch with them, and get them used to the team and the office.

In-office onboarding has the flexibility to be a bit more haphazard. Remote onboarding should be more process-driven because everything is done online, and often across different time zones.

Your goal with **remote onboarding** is to get new hires acquainted with their work and with the team. Don't let this be a repeat of their first day in a new school as a kid. It's your job to make them feel welcome from day one.

Build a virtual sales team you can be proud of

Build a house you want to live in by making the right remote sales hires and effectively onboarding and managing them.

Leaders that make the extra effort will see the benefits of a remote sales team that boosts productivity and closes more deals.

A remote sales team gives you the advantage of having a sales presence in many places. And if you do things right, it's not too hard to see success.

If you're thinking about building a remote sales team or **shifting your current team to a remote one**, these strategies are just what you need to get started.

But, once you've built your sales team, how do you manage them effectively in a remote setting? Jump to Chapter 2 to find out!

TWO

Managing sales teams remotely: 6 ways to keep your reps closing

And you thought managing a sales team in the office was hard. Let's face it: leading a remote sales team is challenging. As a manager, you have less visibility, less direct contact with your team, and less control over the processes and workflows they're using.

Or, do you?

During 2020, many sales managers reluctantly adapted to remote sales because of the pandemic. But before that, many other sales managers were leading remote sales teams successfully and happily.

While remote may seem like a disadvantage since so many were forced into it, a well-managed remote sales team can be just as productive and successful as an in-office team, if not more.

So, how can you manage your sales team remotely?



What makes remote sales operations different from in-office sales?

⚡ *Remote sales is highly reliant on apps and online processes, much more so than in-office sales. Sales managers leading remote sales teams must keep their processes and workflows tight and accessible to the team. Team communication must be prioritized, with clear agendas and goals to make meetings more efficient.*

While in-office sales management can be more spontaneous, remote leaders must work harder to have the same visibility of what their reps are doing.

But having a clear process in place for sales and communication is just the start: These processes require constant upkeep to function

smoothly. Constantly evaluating the right tools to build a sales stack that empowers your team to perform their best is part of your job.

So, how can you perform upkeep as a remote sales manager?

How to manage sales teams remotely: 6 ways to upkeep a virtual sales process

Setting up your process is essential: Keeping it going is the real challenge of managing a virtual sales team.

Here are six ways you can level-up your visibility as a remote sales manager and maintain processes that work for your team:

1. Set clear performance goals for the team

In the last chapter, we mentioned that setting clear expectations is essential for a remote sales team.

One very important aspect of this is to set performance goals for your team.

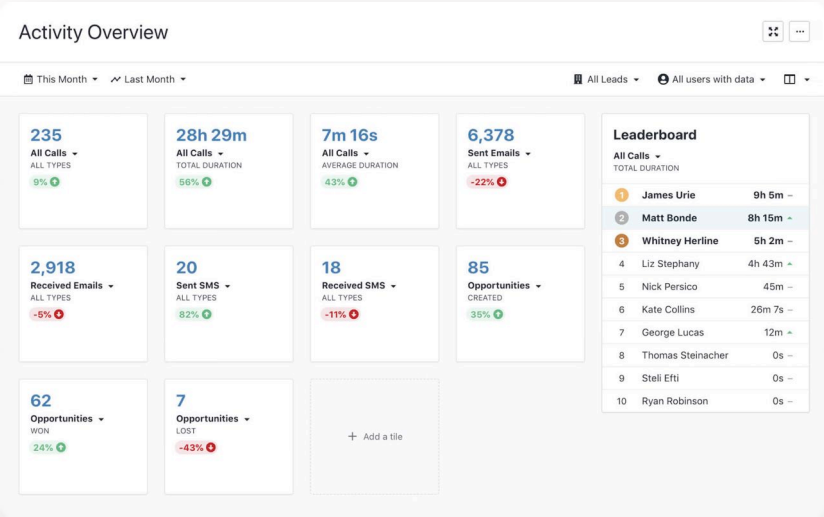
Of course, **sales quota** goals are still important, but remote sales teams should have goals that get them closer to their quota by achieving more of the sales activities that lead to closed deals.

To match your goals to quota, work backwards in your sales process: How many closed deals does each rep need to meet quota? What percentage of meetings turn into closed deals? How many **cold calls** do reps need to make in order to book a meeting? Once you figure these

things out, for example, you could set a goal number of cold calls per day or per week for each rep.

To keep track of these key activities, set up a **sales leaderboard** and watch as reps develop healthy competition while completing essential sales activities.

 *Pro tip: In Close CRM, a sales leaderboard is automatically set up on your Activity Overview dashboard. You can customize the leaderboard based on the activities you want to track, such as the number of outbound calls, call duration, meetings held, SMS or email sent, response rates, and more.*



2. Define the stages and activities of your virtual sales process

While all sales teams should have their sales process well-defined, this is especially important in a remote setting.

When your sales team is dispersed, they can't always pop in to ask you a quick question. Productivity in a remote setting is paramount, so having clear, written processes is essential. When a proven sales process is applied consistently by the whole team, the results can be even better than you might expect.

Generally, the stages of a **successful sales process** look something like this:

- Prospecting
- Researching
- Connecting
- Presenting
- Addressing objections
- Closing
- Delivering
- Following up

Of course, you'll need to define this process according to your particular circumstances and customers.

Next, define the key activities that move prospects from one stage to the next.

For example, when connecting with prospects for the first time, do your reps see more success with cold emails or cold calls? Is there a **sales pitch script** that works better with certain types of prospects? Do prospects from a certain industry respond better to a product demo than to a sales presentation? What kind of follow-ups get better response rates?

When you test these activities and see the results, you'll be able to build a better framework for your sales reps to follow. That way, they'll know exactly what they need to do to close deals whether they've been on the team for years or just started last month.

3. Decide on the remote sales KPIs that impact the success of your team

Tracking the right KPIs allows you to have better visibility into the health of your sales process and your team.

Here are some **sales KPIs** you should be tracking:

- **Sales activities per rep:** This tells you how active each rep is, as well as which activities they're seeing more success with. (Psst... You can track and compare rep activity easily with the Activity Comparison Report in Close CRM.)
- **Pipeline conversion rates:** Tracking this helps you perform a **sales pipeline analysis**, and tells you if your pipeline is healthy. Any fluctuations to these numbers is an early alert that something is wrong with your process.

- **Sales by contact method:** Knowing how your prospects prefer to be contacted helps you define which activities are most valuable for your team.
- **Average conversion time:** When you see how long it takes from the moment of contact to closing the deal, you can test to improve this metric or catch problems in your process before they really slow down the sales cycle.
- **Sales by lead source:** If you see a higher number of sales from a particular lead source, you can direct your team to focus their energy on a certain lead generation method.

These are just a few of the KPIs you could be tracking for your remote sales team. Find the metrics that have the most impact on your bottom line, and set up tracking so you can keep an eye on your process and your team, even from a distance.

4. Give your sales team better visibility into buyer activity and responses

Especially during these turbulent times, the sentiment, priorities and needs of the customer continue to shift. So, how do your sellers know what customers really want today?

Getting better visibility into buyer activity for both yourself and your team is essential to presenting your offering effectively.

So, what are buyers doing? Keep track of website activity with a **sales dashboard**. Understand which landing pages are getting more activity,

and pull topics and arguments from these pages to help your sales team sell more effectively with their sales scripts and email templates.

Also, encourage your team to discuss buyer responses to different tactics or messages. In your daily stand-up meeting with the sales team, have one member of the team talk about a call they had the previous day, whether good or bad, and generate discussion around buyer responses and **sales objections**.

You could also encourage discussion in a specific Slack channel where reps can relate the reactions they are receiving as they call.

This can help you as a manager see where your scripts and templates may need to be adjusted and will help the rest of the sales team have their prospects' current needs in mind as they sell.

5. Help your remote sales team focus their efforts

When your sales team is focused, they are productive.

But, how can you make sure they're focused when you're not with them in the office?

When leading a remote team, it's your responsibility to help reps sell effectively to the right people. One way managers can do this is by helping reps prioritize the right leads.

Set up a **lead scoring** system based on specific attributes and actions that tells reps which leads they need to contact first in their list. Basically, this means assigning a point value to the qualities and activities of your prospects.

It might look something like this:

Action	Score
Clicks through newsletter	+20
Visits pricing page	+30
Attends webinar	+15
Signs up for a trial	+45
No-show for demo	-20
Never opens newsletter	-25

Another way to keep your team focused on the right deals is by regularly cleaning up the data you have stored in your CRM.

For example, is your pipeline cluttered with leads that never moved forward in the sales process and deals that fell through before closing? While **following up** with these people is an important part of winning new business, you don't want these old leads filling up your pipeline and taking away focus from new, hot leads.

Managing remote sales reps involves keeping that data clean so they can focus on selling, not sorting.

⚡ *Pro tip: Want to save old leads for future follow-ups? Create a separate follow-up pipeline and add older leads there. This keeps your main pipeline clear for new deals, while at the same time setting up a specific process to win back these lost leads. In Close CRM, you can set up multiple pipelines and customize the stages to your specific process. [Sign up for a 14-day trial now to see how it works.](#)*

6. Train based on a solid foundation that builds autonomy

Too many sales managers still like to train based on the 'sales tactic of the week' method.

But if you're training on general sales ideas or theoretically effective tactics, how do you know your training will actually be effective?

Instead, remote sales training should be built around a foundation of processes and best practices that have been proven to work over time. You want to **master the fundamentals**, focus on the timeless principles.

In one interview, Chad Sanderson from ValueSelling Associates talked about how several events in recent history have changed the face of business, including but not limited to the current pandemic.

"In order to navigate these turbulent times," he said, "We need a touchstone, we need a framework. If you're training your team on a framework, it gives you the ability to say, 'This framework has weathered more than just this particular moment in time, and I can focus on practicing on this foundation. So, while the hurricane of change is blowing outside, I know my foundation is solid and I'm going to be able to perform

consistently.' By giving them that framework, you give them something that is solid and predictable regardless of what else is going on."

Train based on a solid foundation of proven sales processes, and you'll give your team the ability to work autonomously in a remote setting, no matter what the world situation may be.

4 pro tips for managing remote sales reps

With your processes in place and your reps ready to get started, how can you successfully manage remote sales reps and keep them motivated to keep selling?

Here are 4 pro tips to manage and motivate a remote sales team:

1. Build an atmosphere of accountability

One of the best ways to avoid the trap of micro-managing your remote sales team is to generate a spirit of accountability on your team. This kind of atmosphere motivates sales reps to keep working because they feel personally accountable for the results they see.

Here are some ideas on how to do it:

Task your reps with creating agendas for 1:1s: Or at least encourage them to add items to the list of things to discuss.

Encourage reps to take initiative with new methods and processes: Ask your team for advice and ideas, then have them test their own ideas and prove their theories.

Have reps own their performance goals: When you set performance goals, as mentioned above, have each rep take responsibility for tracking and planning to reach those goals.

Create a safe space to ask for help: Nobody has all the answers. Make sure your reps feel safe and comfortable enough to ask for help within the team. For example, you could create a specific channel in Slack where reps can ask questions about deals in their pipeline and get feedback and advice from you or others on the sales team.

Allow each rep to find their best workflow at home: Personal circumstances differ for each rep, so allow each one to be accountable for their WFH schedule. Whenever possible, allow flexibility so each one can care for their family's needs alongside their workload.

2. Give your team as much transparency as possible

Trust and transparency go hand-in-hand.

If you want your remote sales reps to trust you as a manager and trust the company as a whole, it's important for them to have a transparent view of what's happening in sales and with the company.

For example, when you set up dashboards for key sales KPIs, make sure your reps have access to that data. If you're using Close's Activity Comparison Report, encourage reps to take a look at each other's performance in different areas and talk to each other to improve the aspects they're struggling with.

Of course, during a crisis, the need for transparency is even more acute. In our book, [Leading Sales Teams Through Crisis](#), corporate leadership advisor [Niamh O'Keefe](#) mentioned this:

“ *In a crisis, people want more reassurance and information than usual. Be more transparent than usual, communicate more than usual.* ”

3. Conduct regular 1:1s with each team member

Regular 1:1 [sales meetings](#) with each of your reps must be a consistent part of your schedule, not just a measure you resort to when you notice a problem.

Talk to your reps and pick a day and time during the week that works for them. Then, set this as a recurring event in your calendar. With Google Calendar, you can give invitees access to adjust the event, and leave the door open to adjust this meeting if the rep is on a call or has another urgent task.

Having regular face time with each team member allows you to check in on their work, but also on their emotional health. Create specific agendas that both you and the rep can add to or adjust, but also allow some time just to chat. These meetings will help you build trust with your team, keep tabs on the health of their work situation, and see when it may be time for you to step in and help.

4. Celebrate goals attained and milestones reached

If you ever worked sales in an office, it's easy to miss the mini-celebrations that went on when a deal was closed or a milestone was reached.

But, just because you're managing a remote sales team doesn't mean those celebrations need to end.

While we admit it's not quite the same, there are still plenty of ways to celebrate your team's accomplishments in a remote setting.

For example, why not celebrate deals closed with a GIF in the sales team's Slack channel? Or, prepare fun gifts for reps to receive when they hit their quarterly goals, like a few months to their favorite subscription boxes, such as [Book of the Month](#), [Birchbox](#), [Dollar Shave Club](#), or [BarkBox](#).

Celebrating milestones and goal achievements helps keep your team motivated and united even when working remotely.

Lead your remote team towards productivity and success

Motivating and managing a remote sales team isn't a walk in the park, but it can be done successfully. In fact, many remote sales teams are just as effective as in-house teams: It's all about how you manage your reps.

But now that you've built the foundation for an effective sales process, how can you coach and enable them to perform their work more effectively?

Check out Chapter 3 to see real, expert advice on coaching and enabling a remote sales team.

THREE

Expert remote sales coaching tips + sales games for remote teams

Does your remote sales team feel like selling was more fun in the office?

Remote sales coaching, training, and enablement can be challenging for managers. After all, how do you keep up with each individual rep's current state of mind? How do you keep their sales skills sharp when you're not next to them? And how can you keep a sales team united when they're dispersed across the country (or even the world)?

These are common challenges today's sales managers face. That's why we've spent some time chatting with some of today's top remote sales managers to bring you this chapter of the Remote Sales Guide.





How to coach & enable a remote sales team

⚡ *To coach and enable a remote sales team, focus on their needs as individuals as well as a group. In a remote setting, communication and training must all be done more intentionally. Setting up and documenting your own unique processes for remote sales training and coaching will help keep your whole team on the same page: Then everyone will have clear in mind what's expected of them and when.*

In-office, you have the ability to wander around the sales floor, listen to your reps, and casually add your feedback to their workday.

Remote **sales managers** need to be more structured in their approach to coaching. You can't just look across the room to see if a rep is on a call or if they're free to chat; you need to schedule that time with them.

And you never want your remote sales reps to wonder who to reach out to when they're facing challenges, or how and when to best contact them. You need to proactively ensure that every team member knows who they can reach out to when they're struggling to **protect them from burning out**.

So, what strategies do today's sales leaders use to keep their virtual teams motivated and engaged?

Tips & strategies to keep your virtual sales team engaged (from real sales managers!)

Wondering how the practitioners in the field of remote sales are coaching and training their sales teams? Below, you'll find 14 top-tier strategies remote sales managers are using to enable and empower their high-performing teams.

1. Combine clear expectations with flexibility

“ Have clear expectations as to what their day to day activities should look like (no ambiguity), but give flexibility and autonomy in their schedule as long as they are making an impact.

Used effectively by: **James Urie of Close CRM**

How it helps remote teams: Gives reps the structure they need to work remotely, with the flexibility to help them adjust to their work-from-home lives.

2. Be more strategic with your 1:1s

“ *Realize your reps are people: You can't take a one-size-fits-all approach to leadership in a remote setting (or any other for that matter). Don't push or cancel 1:1's. Prepare an agenda, share it beforehand to get their thoughts and important items to cover, and then stick to it in the meeting. Then, listen and make notes. Try to understand their barriers. Finally, create a plan and communicate how you'll help from what you're hearing, and then do it.*

Used effectively by: Amy Volas of Avenue Talent Partners

How it helps remote teams: Prioritizing 1:1s with a clear structure helps show remote reps that you care and view them as important.

3. Build consistently inconsistent coaching

“ *Do things differently than you had before when you were not remote. What you did in the office will not translate virtually, so make sure you are adapting. One big piece for me is to make sure you are consistent in your coaching but inconsistent in how you go about your coaching. Make sure you are adding new wrinkles and develop coaching sessions that differ from week to week!*

Used effectively by: Julian Marcuzzi of Predictable Revenue

How it helps remote teams: A structured but fresh approach to coaching will help keep remote reps engaged.

4. Use a live call coaching tool

“ 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. We also debrief immediately after the call to share feedback and discuss the call while it's fresh in our minds.

Used effectively by: Nick Persico of Close CRM

How it helps remote teams: Real-time listening and coaching allow remote sales managers to keep a constant handle on their reps' calls, and gives them a better perspective to coach from.

5. Hold people accountable in a fun way

“ We have a Monday morning standup, and public commitments are listed in a shared Google Doc. Each person gets checkmarks for when you hit your commitment. If you don't hit your commitment, there are fun consequences that are non-mandatory. One time, my consequence was eating only Greek yogurt for an entire day. We have fun, we all have a good time doing it.

(Listen to the full interview with Armand Farrokh on the [Predictable Revenue Podcast](#))

Used effectively by: [Armand Farrokh of Pave](#)

How it helps remote teams: Accountability is important, but never force your reps to be on the spot or make them feel as if they're being scolded.

6. Generate a collaborative mood at the beginning of meetings

“ *Jumping on a meeting, we take the first few minutes to loosen up, talk about general topics, catch up, then dive into the subject. Sometimes people are a little bit too rigid: they're just there to speak when spoken to. So build a collaborative atmosphere, start the meeting with an informal question to prompt a more collaborative brainstorming session. Throw them off guard with a general question like 'Hey, who's watching Tiger King?' After the meeting, I'll have a formal conclusion, but keep people on. Always end the meeting a little early. Allow them to debrief, decompress, talk about how they feel about the meeting's content.*

(Listen to the full interview with Dave Tuttle on the [How to Succeed Podcast](#).)

Used effectively by: [Dave Tuttle of ZipRecruiter](#)

How it helps remote teams: Helps them get out of a rigid mindset and makes virtual sales meetings more collaborative.

7. Creatively celebrate your team's wins and regularly check-in

“ *Passively share your team's wins in a Slack channel. I try to send or coordinate thoughtful surprises to folks when they do something great. When they wow me, I try to wow them back. Over-communicate on most everything. Reach out to each person individually every day, even if it's just to ask how things are going. Send reminders early and often.*

Used effectively by: Nick Persico of Close CRM

How it helps remote teams: Celebrating the wins (even the small ones) keeps your remote sales team motivated.

8. Be more accessible to your team

“ *A great way to illustrate that you care and are available is to set up office hours so your team can approach you outside of the 1:1 or team standup. There should be less talking about being a great coach and more doing through the action you take and accessibility you create as a leader to meet your people where they are versus where you're trying to force them to be.*

Used effectively by: Amy Volas of Avenue Talent Partners

How it helps remote teams: Accessible managers show their team they care and empower them to resolve their challenges collaboratively.

9. For larger sales teams, create times for smaller groups to meet

“ There are 1:1s and all-team standups, but we also need something in between. You can't get a really good conversation going with 30 people. Every week we rotate different groups and we do small group tape teardowns. We'll have 4-6 AEs in a room at a time, 1 AE will pull up one of their discovery tapes and will pause every 3 minutes and ask: 'What should we have said?' 'How can we handle this competitor?' 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.

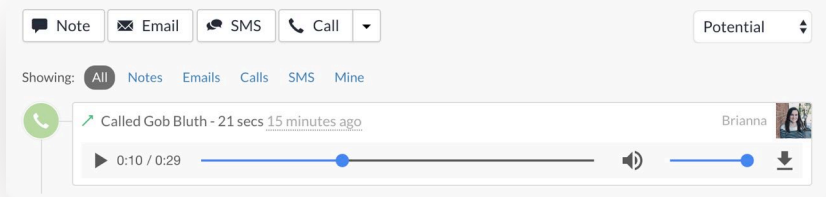
(Listen to the full interview with Armand Farrokh on the [Predictable Revenue Podcast](#))

Used effectively by: [Armand Farrokh of Pave](#)

How it helps remote teams: Building smaller groups to brainstorm ideas and discuss calls helps managers scale their time while still generating good conversations with remote reps.

10. Encourage more structured feedback sessions

“ The best arrangement I've seen involves three steps: 1. Manager and rep call showing, plus feedback after the call. 2. Peer-to-peer call shadowing, and a brainstorming session after the call. 3. Finally, managers listen to 2 to 5 recorded calls or demos per rep, per week (depending on the size of the team) and send structured, documented feedback to the reps.



Remote sales friendly CRMs like Close come with built-in call recording and call coaching features. This way call feedback and coaching is part of the daily sales culture, and happens in a real-life setting.

Used effectively by: James Urie of Close CRM

How it helps remote teams: Feedback between managers and reps as well as peer brainstorming helps encourage collaboration between remote team members.

11. Double down on empathy

“ For me, it really comes down to empathy - it has never been more important to put yourself in your reps' shoes and determine how you can engage each individual uniquely. You can't have a blanket approach here as what works for one team member might create the opposite behavior for another. That said, there are a couple of things that I tend to focus on more so, as table stakes, in a remote culture: First, make sure you are over-communicating on expectations and on the directional vision of the organization. Secondly, make sure you are available to your team - don't push off meetings. Facetime with

each of your reps has never been more important and impactful.

Used effectively by: [Julian Marcuzzi of Predictable Revenue](#)

How it helps remote teams: Leading with empathy will help you train and coach reps as individuals, and give them the necessary knowledge and tools to succeed wherever they are in their career or life.

12. Enable SDRs to learn from each other

“ We do open-mat call reviews. This is optional Thursday morning, if you want to bring a call you can, the whole team comes in normally because it’s cool to listen to other people call. You can’t tell reps to go listen to 10 cold calls on their own, you have to create an environment where your team can have that organic back-and-forth and listen to a call together. The team gets calls together, they throw them on an Asana board, and we just crank through them one-by-one. I don’t want to have people listening to calls in a silo, I want to hear their opinions to make sure they’re thinking about calls the right way, and then help other reps think that same way.

(Listen to the full interview with Armand Farrokh on the [Predictable Revenue Podcast](#))

Used effectively by: [Armand Farrokh of Pave](#)

How it helps remote teams: By actively promoting peer learning on your team, you can turn these into productive brainstorming sessions where reps level-up their skills as a team.

13. Dig into what's working

“ Every sales meeting starts with: What's going right? Get everyone involved, go around the table, so everyone's engaged. It's easy to find issues, but let's start with what's going right. I will stop the meeting in its agenda if someone brings up an experience, I will ask them to tell everyone more. Don't just tell me the meeting was great, what was great about it? 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. Talk less, ask more.

(Listen to the full interview with Rene Zamora on the [Predictable Revenue Podcast](#))

Used effectively by: [Rene Zamora of Sales Manager Now](#)

How it helps remote teams: Reps learn from each other, every meeting is team learning.

14. Build a process for tribal knowledge transfer

“ One of the advantages you get when you sit with people day-to-day in the same office, sharing the same water cooler, and having lunchtime interactions and conversations, is that there's a lot of knowledge transfer that happens just fluidly. When people watch their peers work, they gain that knowledge almost in a tribal sense. You can have great documentation of your process. You can have everything from flow charts, Google docs, and a plethora of information that's shared throughout

the team about best practices, but sales reps really learn by mirroring and imitating the best of that group. So, I think that one of the important things is to create a holistic learning environment that doesn't just rely on sharing good calls, sharing best practices, sharing calls of the week. Those are things we do, but reps should also sit in and work deals together sometimes. Then they'll understand what's really effective messaging because they can hear it, and they can see it. It's not just about someone telling them, "Say this," it's really about understanding your customer. This drives home the value of certain tasks, especially in our business.

(Listen to the full interview with Derek Rahn on the [Modern Sales Podcast](#).)

Used effectively by: [Derek Rahn of Lead Genius](#)

How it helps remote teams: Replaces the fluid knowledge transfer you get in-office with something that's structured and actually works for remote teams.

15. Build out your CRM alongside your remote team

“ Implement CRM with your team and continue to tweak over time. Think: what do your salespeople need from the CRM system? Don't just build something and roll it out. Your sales team will feel that nobody knows what they need or what they want, that nobody asked them. This is especially the case with international teams working through cultural differences. Get the team involved when building out these systems and

processes. In one remote team I knew, this was always the joke when new systems were rolled out: "Oh yeah, this came from that country." When it's coming from another country, salespeople might think, "Oh, this isn't adapted to our country's market." Build it together, and each salesperson has ownership in the system and process.

(Listen to the full interview with Rebecca Twomey on the [Let's Talk Sales podcast](#).)

Used effectively by: [Rebecca Twomey of Party Center Software](#)

How it helps remote teams: Give your remote team ownership over the process, and they'll feel more motivated to follow that process in their day-to-day.

 *Pro tip: Want a CRM that does the heavy lifting while staying out of your way? [Your free trial of Close CRM is waiting](#) (we won't even ask for your credit card number)!*

16. Make training part of a predictable schedule

 *You need to keep people engaged and communicating, especially now. You need to implement a clear structure from day one. That way, people come in with expectations, they're in a routine, and they plan their lives around these team meetings and activities. To build predictable revenue, you need predictability in your team and in everything that you do. For us, here's what this looks like: Monday morning standup, Wednesday is a skill-building activity with the team, then dial*

blitzers and quick standups with the team to keep people fresh during the week.

(Listen to the full interview with Armand Farrokh on the [Predictable Revenue Podcast](#))

Used effectively by: [Armand Farrokh of Pave](#)

How it helps remote teams: Predictability breeds stability for your remote team.

6 sales games for remote teams to keep your salespeople unified

Whether you're looking for team-building activities or games to keep your reps' sales skills sharp, these ideas will give you a good place to start when organizing games for your remote sales team.

1. Skill-Builder

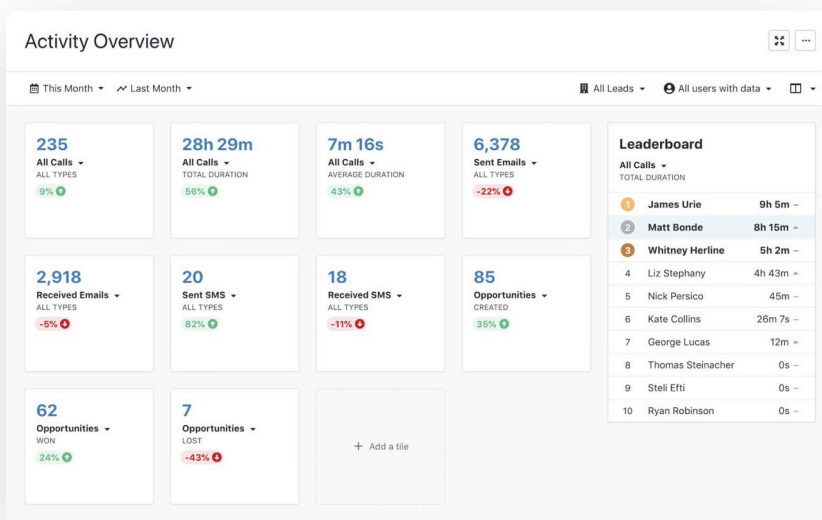
“ *We group together games to build specific skills that can translate to reps' day-to-day activities. An example of this would be a game around negotiation (such as the Ugli Orange activity)* ”

Used effectively by: [Julian Marcuzzi of Predictable Revenue](#)

2. Friendly incentive

“ For a standard team of 3+ reps hustling to close deals, competition is motivating. A good friendly competition with leader incentives would be: Make X calls, create X opportunities, win X opportunities, hold X qualified demos, and get a \$25 gift card.

Used effectively by: James Urie of Close CRM



⚡ Pro tip: Did you know you can use Close CRM to set up a leaderboard based on the goals you want to set for your team? Arrange your top sales reps by the number of calls they've made, emails they've sent, responses they've received, minutes they spent on the phone with prospects, deals they closed, and more!

3. Cold call bingo

In a twist on the classic Bingo game, reps take turns making cold calls while the rest of the team listens. Then, the team fills out their Bingo cards with common sales methods and conversation milestones.

4. Pictionary

“ We love to do team-building, fun activities. To either lighten the mood, have a laugh, enhance the culture, or break some redundancy, we often end up doing a Pictionary-type game found at Drawize.

Used effectively by: [Julian Marcuzzi of Predictable Revenue](#)

5. Gamified cold calling

Assign points to different steps in the call, such as making the lead laugh, scheduling a follow-up call, getting an email address, etc. Reps team up, with one calling and the other keeping track of the score.

6. Sales Jeopardy!

Use the template to create your own Jeopardy! sales game. This could be a quiz about your product, your customers, your competitors, sales processes, and more. Sales Jeopardy! is especially good to help new onboards in a more fun, interactive way.

Empower your team with the right mindset to close more deals

Remote sales coaching and training isn't once and done: You'll need to take time to get feedback, adjust, and refine your processes.

The important thing is to **just get started**.

Set up a regular structure for coaching and training. Build a routine that your reps can follow and plan their lives around. Show true empathy and be available for your reps.

When you follow these key practices, you'll be imitating the top-tier remote sales managers who are currently crushing it, even while selling remotely.

Of course, in order to truly empower your team, more than mindset is needed: You'll also need to enable them with the right tools for the job.

Jump ahead to Chapter 4 to see the top remote sales tools you should add to your sales stack.

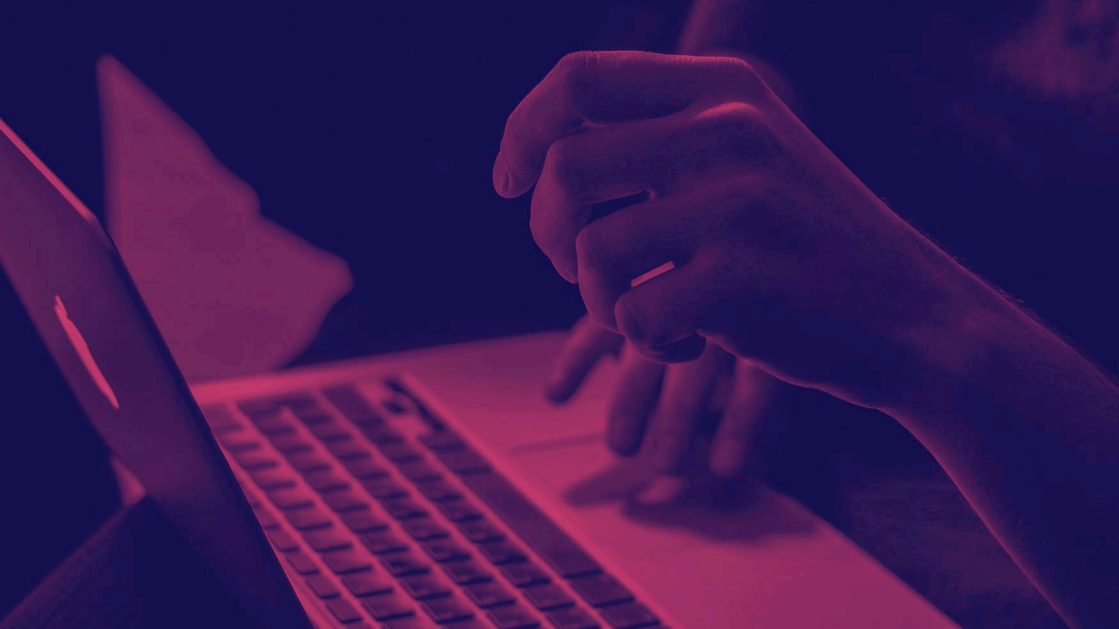
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52 top remote sales tools for your team to absolutely crush it

Looking for the right remote sales tools for your team? Choosing the best tools for your company's needs can be challenging—because there are so many apps out there.

After all, you want tools that make it easier for your reps to make more sales, and enable them to do their best work possible. Some people prefer an all-in-one solution, while others prefer to build a highly customized sales stack by connecting a variety of tools through APIs and integrations. In truth, there's no one definite "right" approach.

So, which remote sales tools will actually enable your team to work smarter and close more deals?



Best remote sales CRMs

In this chapter, we're going to dive into 52 apps that empower remote sales teams. From this list, you'll be able to decide on the right tools that make your team shine.

For a remote team, a CRM is more than just a place to take notes: it's the hub where conversations happen, deals are closed, activities are tracked, and revenue is reported on. The best remote CRMs give you visibility into the actions your reps are taking, and how those actions translate directly into results.

That said, here are our top five recommendations.

1. Close

Cost: \$255 - \$1,500 per user annually

Best Feature: Close's built-in communication features, which enable your reps to spend less time on manual data entry and adminwork, and more time closing deals.

We're obviously biased, but truly believe that Close is ideal for agile, performance-focused remote sales teams. With integrated calling, emailing, SMS and video calls, and powerful sales automation features, Close helps reps stay focused on activities that drive revenue.

2. Salesforce

Cost: \$3,000 - \$8,000 per user annually

Best Feature: The standard for large, enterprise sales teams

Salesforce is a powerhouse CRM that tackles basically everything sales, support, and marketing-related. For remote teams, this monster toolset includes tons of reporting features, meaning sales managers can see exactly what their teams are doing and the results their efforts bring, down to the most minute details.

The only downside: for teams who aren't already trained to use Salesforce, it will take months to get fully used to running this beast. Also, if your remote sales team works from different countries, Salesforce may not be for you since their calling options are only available in the US and Canada.

3. Hubspot

Cost: \$4,000 - \$14,000 per user, annually

Best Feature: Marketing and sales conversations in one place

Hubspot is another popular choice for SMBs and startup sales teams looking for a good fit. With live chat features, call and email tracking, and great educational materials, Hubspot can be a good choice for remote sales teams.

Unfortunately, Hubspot does not support inbound sales calls through the CRM, or SMS functions. It also lacks historical email sync, only allowing you to track conversations you've had since integrating with them.

4. Pipedrive

Cost: \$1,400 - \$4,000 per user, annually

Best Feature: Plain and simple CRM that's easy to start using

This simple CRM does exactly what a CRM should: Allow you to manage leads in your pipeline, track communications, automate the busy-work, and give you insights into your sales process. That said, Pipedrive is best for very small teams or solopreneurs, since it lacks the more robust reporting and outreach features of other CRMs. That makes Pipedrive difficult to scale if your remote team is growing in numbers and deals.

5. SalesTable

Cost: Free

Best Feature: Free spreadsheet CRM with a visual dashboard

If you're just starting out and want a CRM that won't break the bank, check out SalesTable, the free CRM template for Google Sheets. Here you can log basic lead information and interactions, plus collaborate effectively with other members of the sales team. This template also includes a dashboard that gives you a visual view of the deals in your pipeline.

Tools for remote prospecting

Whether you're networking with potential customers or trying to engage new leads in conversation, the right tools will allow you to smoothly transition from "Hello" to "Let's close this deal."

6. Clearbit

Cost: Only available upon request

Best Feature: Automatically enriched customer data

Learn about your network and your prospects in real-time with Clearbit. This tool keeps you informed about how your leads are interacting with your website, updates about their company or role, and easily accessible and enriched data. This makes it easier for remote sales reps to have a handle on what's happening in their network without the advantage of rubbing shoulders with these people regularly.

7. LeadFuze

Cost: Starts at \$132.30 per month

Best Feature: Automated lead search and data population

Looking for leads? Want useful, up-to-date contact info? Then you need a prospecting tool like LeadFuze. It helps remote sales teams stay productive by integrating directly with their CRM and updating information automatically, without duplicating leads.

8. ZoomInfo

Cost: Only available upon request

Best Feature: Real-time sales intelligence

While ZoomInfo can be used to get lead contact information, it's so much more than a sales prospecting tool. This tool can help your remote team get the latest on what's happening with the companies and buyers in your network.

9. Profiler

Cost: Free

Best Feature: Industry-specific customer profile tools

To prospect well and sell effectively, you need to know your ideal customer. Profiler is a toolkit that helps you define key profiles inside your existing customer base, including ICP templates based on your specific industry and sales style.

10. LinkedIn Sales Navigator

Cost: Starts at \$59.99 per month

Best Feature: LinkedIn sales made easy

LinkedIn is the go-to tool for generating leads and searching for information about your prospects. That's why the LinkedIn Sales Navigator is a great tool: It works alongside you on the platform you're already using to find new leads. This tool allows you to do a more advanced company search and even suggests leads that fit your criteria.

11. BuiltWith

Cost: Starts at \$295 per month

Best Feature: Quickly populate lead lists with companies currently working with your competitors

This prospecting tool allows you to search for specific technologies being used on websites across the globe. That means you can quickly populate lead lists by searching for websites that use your competitor's technology. You can also filter these lists by technology spend, tech category usage, traffic ranking, usage duration, and more! Another way to search is by keywords, meaning you can search for a specific type of business that is using certain types of tech (or even ones that aren't using that type of tech).

12. Hunter

Cost: Free for 50 monthly searches or paid plans start at \$49 per month

Best Feature: Simple email search

Whether you want to search for all the emails in a company, or for a specific email address of a prospect, Hunter can help you out. It also has an email verifier tool to check whether an email you have is still correct.

Top sales engagement platforms for remote teams (5)

Once you've found your prospects, it's time to talk to them. So, what are the best outreach and sales engagement tools that your remote team can use to build the foundation for solid customer relationships?

13. Outreach

Cost: Only available upon request

Best Feature: Automated communication based on your own proven sales sequences

Outreach is a sales engagement platform for remote teams that want to scale their outreach efforts without bogging down their workday. It allows you to maximize your follow-up process, set your own customized sequences, and reach out to prospects on a variety of channels.

14. Reply

Cost: \$63 per month, per user

Best Feature: Multi-channel outreach and automation features

The modern sales rep will use many different channels to contact their prospects. And also, depending on where your reps and customers are located, different channels will be more efficient. This is where Reply shines: Allowing your team to do outreach and automate sales engagement on the channels where your customers spend their time. Along with email, SMS, and calls, Reply also allows reps to connect with prospects via WhatsApp messages, LinkedIn, and more.

15. Mailshake

Cost: \$99 per user, per month

Best Feature: Automated outreach sequences that are customized to your favorite channels

Another outreach tool for remote sales teams, Mailshake works with much more than your email: It allows you to build custom cold outreach sequences through phone, email, LinkedIn, Twitter, and Facebook.

16. Drift

Cost: Free for Live Chat, advanced pricing only available upon request

Best Feature: Interactive chatbots qualify leads for you

This sales engagement and live chat tool integrates to your website and allows you to interact directly with customers that arrive on important pages. More than that, you can set up Drift with custom chatbots that qualify leads automatically. This saves your sales team the time and effort of manually qualifying all new website visitors and sends your sales team only the leads that are most relevant to your business. In fact, the Drift chatbot can even book meetings with qualified prospects to talk with your sales team!

Drift also integrates directly with CRMs like Close, meaning new leads and conversations are automatically logged for the whole team to see.

17. Intercom

Cost: Starting at \$39 per month

Best Feature: Live chat with integrated meeting scheduler

Another on-page live chat and chatbot tool, Intercom empowers your team by automatically segmenting and organizing new leads before they even speak directly with your team. For example, set rules within your Intercom chatbot to specify when a new lead should be directed to a free trial signup or should book a meeting directly with a sales rep. Intercom also integrates directly with CRMs like Close.

Best platforms for remote sales enablement

When your team is working from home, keeping them consistently productive is more of a challenge (and infinitely more important). As a sales manager, it's your responsibility to keep coaching them from a distance, build interactive training, and enable reps by giving them the content and productivity tools they need to close deals faster. Here are eight tools that help you do all of that:

18. Showpad

Cost: Only available upon request

Best Feature: Centralize content and coach at scale

Showpad is a sales enablement platform specially designed to help remote sales managers coach their teams and give them the content and confidence they need to close more deals. You can save content and group it together into customized playbooks, coach at scale with video courses, and use analytics to see how sellers (and buyers) are interacting

with your content. Using AI, Showpad will even recommend content to sellers at the right stage of the deal to move things forward.

19. **Guru**

Cost: Free for up to 10 users, or paid starting at \$14 per user, per month

Best Feature: Easy-to-build sales enablement documentation

Keep all of your important documentation and sales enablement content in one place. Guru is the place to build and manage the content that enables your sales team to sell better and gives them the know-how to close deals. It also includes great features such as regular expert verification and a browser extension that brings content to your sales conversations, wherever they're happening.

20. **PandaDoc**

Cost: Starts at \$19 per user, per month

Best Feature: Document productivity through easy send and sign

Do you know how much time your sales team wastes creating, sending, resending, and getting signatures for documentation with their prospects? PandaDoc is a tool that accelerates deals by giving you customizable workflows for your documentation, including proposals, contracts, and more. Its e-sign features allow your reps to send documents easily, see when prospects have opened them, and get immediate notification when the deal is signed. Plus, it's easy to create documents that are not only functional but also visually appealing.

21. **Confluence**

Cost: Free for up to 10 users, or paid starting at \$50 per month

Best Feature: A single source of truth for your remote team

This remote collaboration tool combines knowledge management, project collaboration, and social intranet. It offers a connected structure for remote teams, allowing individuals across your remote organization to have one single place to organize their workflows and build a culture of teamwork.

22. Notion

Cost: Starts at \$8 per person, per month

Best Feature: A single online workspace for your team

This tool is a team wiki, project management, and documentation tool all rolled into one. Store your sales enablement content (such as sales battle cards, cold call scripts, and email templates), set up projects, assign tasks, and take shared notes from meetings or team syncs.

23. Slab

Cost: Free for up to 10 users, or paid starting at \$6.67 per user, per month.

Best Feature: Easy topic organization and hierarchy for documents

Your team knowledge can all live comfortably in Slab. The great organization features and search capabilities allow your team to build, analyze, and update their knowledge base easily.

23. TextExpander

Cost: Starts at \$3.33 per month

Best Feature: Type your own customized acronyms and automatically populate the text you want

This time-saving productivity tool is great for sales teams who want to avoid typing. All you have to do is create your own snippets, or short acronyms, and TextExpander will automatically fill in your pre-made templates or text. For example, sales teams can use this to take the email templates from their CRM and use them in messages on other platforms, such as LinkedIn.

24. Process Street

Cost: Starts at \$12.50 per user, per month

Best Feature: Interactive and multi-media checklists

Your sales team has specific processes that they use throughout the sales process, but how do you keep track of these processes? Process Street is a checklist tool that works as a collaborative workflow for your team. Build your checklist, add media, assign tasks, set up recurring procedures, and integrate with other tools to automate tasks and update other apps when actions are complete inside your checklist.

Remote sales team building tools

With a distributed team, how can you make sure your reps are working collaboratively with each other? How can you build camaraderie with people who have never met in person?

Here are six tools to help with your team-building efforts:

25. **Ambition**

Cost: Only available upon request

Best Feature: Sales coaching, gamification, and performance insights

For sales teams who miss the atmosphere and energy of the sales floor, Ambition is working to get that feeling back for remote teams. Sales managers can set structured coaching timelines and goals, reps can see how they score in various types of contests and leaderboards, and sales execs get team performance metrics at a glance.

26. **Howspace**

Cost: Starts at \$195 per month

Best Feature: AI-assisted peer-to-peer learning and social connectivity

This digital collaboration tool is built to help your remote team learn from each other, even when they're apart. Rooted in social learning and powered by AI, Howspace helps managers by facilitating workshops and events for their distributed team and helping you work on organizational development and new initiatives collaboratively.

27. Icebreaker

Cost: Free for events with up to 40 participants, or paid starting at \$95 per month, per group

Best Feature: Templated online events for remote teams to get to know each other better

Sometimes, generating meaningful conversations with a remote team isn't easy. Icebreaker aims to fix this by helping you add clear structure to your virtual gatherings, whether it's a one-on-one, virtual happy hour, team-building event, and more!

28. Donut

Cost: Free for up to 24 users, or paid starting at \$49 per month

Best Feature: Automated conversation starters, team introductions, and more in Slack

Want to get your remote sales reps talking to each other? Donut integrates into Slack and automates conversation builders. You can use it to match remote employees for a coffee chat, add prompts to your virtual watercooler, run a lottery program that matches an employee to the CEO to meet together, and more.

29. Arcade

Cost: Only available upon request

Best Feature: Gamify the sales process to keep remote workers engaged

If you're looking for new ways to build incentives and create fun rewards for your sales reps, Arcade is setting out to be your new best friend. This tool automates rewards and gives your reps the power to choose their favorite reward out of the list, and can set up fun games for your team so you can focus on getting work done. Best of all, this tool is innovative with its design, moving away from leaderboards to focus on a truly game-like experience in-app.

30. mmhmm

Cost: Free

Best Feature: More interactive Zoom meetings

Feeling like your video meetings could use some pizzazz? Want to dress up your presentations? Mmhmm is a tool that allows you to create immersive slides for your video meetings, meaning you as the presenter are part of your own presentation. There's also a Copilot mode that allows someone else to run the tech side of the presentation while you focus on what you're saying. You can even record and share your presentations with others.

This is a fun tool for remote teams to have more interactive, fun meetings. And because of the visual aspect, everyone will walk away with a clearer idea of what was said.

Best analytics tools for remote sales teams

Sales managers need to see what their team is accomplishing in order to set more reasonable goals, forecast more accurately, and coach more effectively.

So, which analytics tools allow you as a sales manager to take a deeper dive into the activities and accomplishments of your team?

31. Gong

Cost: Only available upon request

Best Feature: AI-based sales intelligence to identify key behaviors and top deals

Built especially for remote sales teams, Gong is the modern replacement for walking onto the sales floor and listening to your reps. It captures information about your leads and your sellers from sales conversations recorded into the system, allows you to see what separates top performers from the rest of your team, and gives you real data to back up your decisions and coaching.

32. Chorus

Cost: Only available upon request

Best Feature: Automatically surfaces calls that need attention and opportunities to coach your team

Another call analysis platform, Chorus uses AI to translate call data into actionable advice for you as a manager and for your team. You can track

words or phrases in your reps' sales conversations, and how those affect the outcome of the call. You can also see market insights, such as competitors that commonly come up in sales calls, or pull common phrasing of pain points and problems to add to your sales scripts for future conversations.

33. **Geckoboard**

Cost: Team prices start at \$125 per month

Best Feature: Customizable sales dashboards to track remote sales KPIs

Want to track KPIs and metrics that are gathered in several different apps? Combine your most impactful metrics into one sales dashboard with this customizable sales dashboard tool. You'll have access to real-time data and can make that visible to your entire team (or company execs).

34. **Clari**

Cost: Only available upon request

Best Feature: Data collection and AI-powered insights

This revenue operations platform is built to generate clear, visual views of your current sales process and marketing data, and turn that into a more predictable process for generating revenue. Clari also automates forecasting tasks, meaning you can take that real data and turn it into something your reps can act on, rather than spending hours sifting through the raw data yourself.

35. **timetoreply**

Cost: \$10 per mailbox, per month

Best Feature: Email response time analytics for remote sales teams

This tool allows sales managers to measure email reply times, monitor group mailboxes, and track trends and reply ratios.

Top collaboration tools for sales reps

Collaborating across countries and time zones isn't easy. You need to implement the right processes and tools to make sure your reps are collaborating with each other effectively. Here are four tools that help you do just that:

36. Google Workspace (Previously G Suite)

Cost: Starts at \$6 per month, per user

Best Feature: Synchronous communication and collaboration via email, Calendar, Meet, Docs, Sheets, and more

Sync your remote team with Google suite of work tools, including company email, video meetings, and live working Docs, Sheets, Slides, Forms, and more. Google is the hub where communication and collaboration happen at once, in real-time.

37. Miro

Cost: Free, or paid starting at \$8 per month, per user

Best Feature: Real-time collaboration on an infinite whiteboard

Miro is the ultimate tool for creative minds who want to see the big picture or create and organize down to the last detail. It is a fully customizable whiteboard with hundreds of easy-to-use templates, meaning you can do pretty much anything from creating a GTM strategy, mapping a customer journey, building a customer persona, more.

38. Front

Cost: Starts at \$9 per user, per month

Best Feature: Easy collaboration for omnichannel communication with prospects

So much of your communication happens in disparate platforms across your toolset. Front works to bring all of those conversations together in one place while allowing your sales team to set and execute workflows based on those communications. Reps can also collaborate on communication in real-time, and instantly create templates from their most effective messages.

39. Podio

Cost: Paid plans start at \$9 per user, per month

Best Feature: An online workspace that fosters collaboration and transparency

Podio is a customizable work management tool that allows you to have content, conversations, and processes all together in one place.

Tools for salespeople to communicate with their team and their prospects

Communication is a number-one priority for remote sales teams. As we've mentioned before in this guide, remote sales teams and managers must learn how to overcommunicate with each other, as this transparency will help everyone collaborate better and work smarter to get the job done.

So, what are some essential tools for remote sales teams to communicate with each other and with their prospects and customers? Here are eight you should consider:

40. Slack

Cost: Starts at \$8 per person, per month

Best Feature: Organized real-time or asynchronous conversations with teammates, wherever they may be located

Slack is the go-to tool for team communication. You can organize teammates into groups, collaborate on projects via specific communication channels, or chat directly with your coworkers. Slack also integrates with other tools to create custom, automated messages. That way, your sales team can stay up to date with new deals in the CRM, receive new lead assignments, or monitor brand mentions on social media for quick follow-up.

41. Zoom

Cost: Starts at \$149.90 per year, per license

Best Feature: The standard in video communication

Zoom into your next meeting with the tool that does it all. You can host 100 participants (or more) on a video call, or chat comfortably with your prospects or your teammates.

42. Loom

Cost: Free, or paid starting at \$8 per month, per user

Best Feature: Record video messages of yourself while sharing your screen

You know how sometimes you can't explain what you need to, but you can show someone what you mean in an instant? Loom allows you to do that: It's asynchronous video communication through recordings of both your screen and your face, meaning you can explain what you need to while showing what you have to. This is a great tool for reps to explain key product functions to prospects, or for managers to get new hires ramped up on essential sales tech and tactics.

43. Calendly

Cost: \$8 per user, per month

Best Feature: Quick, painless scheduling

Calendly is the solution to the countless back-and-forth emails you have when trying to schedule a meeting. Simply set your available times, send someone your Calendly link, and they can book a time that works for both.

Check out more of our favorite scheduling tools for salespeople [here](#).

44. Demodesk

Cost: Starts at \$25 per user, per month

Best Feature: Easy-to-run meetings with no download required

This 100% browser-based video meeting tool allows you to quickly chat with prospects, run collaborative browsing and editing, and set up screen sharing in a way that's meant for customer-facing conversations (which is great for product demos). Demodesk also has intuitive schedule features, allowing sales teams to sync their calendars and get round-robin bookings for sales conversations.

45. Dubb

Cost: Free, or paid starting at \$40 per month

Best Feature: Create videos and use them for sales communications or for internal communication with your team

Dubb allows you to record videos, build landing pages for those videos, and track views and subsequent actions taken. You can also use your videos with business communication on LinkedIn, or use videos to communicate quickly with your team, even inside Asana or Slack.

46. Twist

Cost: Free, or \$5 per month, per user

Best Feature: Keep written communication organized

This Slack alternative is more than just a place to chat with colleagues. If you ever feel like your conversations in a messaging app are getting out of hand, Twist knows how you feel and is attempting to help you keep those conversations organized. Inside specific channels, new conversations are organized into threads, meaning new messages are always the start of a new thread. This makes it easier to go back and reference a previous conversation, and important messages don't get lost in a never-ending group chat. Twist also lets you send messages to individual team members.

47. Microsoft Teams

Cost: Free (Paid plans of Microsoft 365 start at \$5 per user, per month)

Best Feature: More robust instant messaging features

For dispersed teams, Microsoft Teams helps you build conversations and take them anywhere. Like the apps mentioned above, you can organize your conversations to keep everyone focused on the end-goal. Teams also includes interesting chat features such as the ability to send voice messages and inline chat translation.

Best project management services for remote sales managers (5)

While the sales team's main project (closing deals) is mostly done inside your CRM, there is any number of other projects your remote sales team may need to collaborate on. Here are five tools that help your team build and manage their projects and their time remotely:

48. Trello

Cost: Free, or paid starting at \$9.99 per user, per month

Best Feature: Kanban-style boards that you can customize to your workflows

This flexible project management tool allows you to build your own workflows, create your own projects, organize and assign tasks, and keep your plans moving forward.

49. Asana

Cost: Free, or paid starting at \$10.99 per user, per month

Best Feature: Flexible project management, built the way you want

A more robust project management tool, Asana allows you to build projects and tasks the way you like. You can see each project as a list, board, timeline, or calendar, and easily switch back and forth between different views. Stay up to date with projects, communicate with your team, assign and complete tasks, and watch your productivity soar.

50. Toggl

Cost: Free for up to 5 users, or paid starting at \$9 per user, per month

Best Feature: Time tracking for remote employees

Keep track of your team's work-life balance with Toggl Track, and see how much time they spend doing different tasks. Toggl gives you the ability to monitor the workload of each rep, and helps you see how well they use their time as well as when they may need to take a break.

51. DeskTime

Cost: Starting at \$8 per user, per month

Best Feature: Work and vacation time management

DeskTime tracks the productive and unproductive apps and tools your team is using during the day, allowing you to see how your team spends their time at work. You can also manage days off and team members can schedule vacations. A handy, built-in Pomodoro timer also helps your reps remember to take breaks during the day

52. Harvest

Cost: Starts at \$12 per user, per month

Best Feature: Visual view of your team's capacity and workload

Harvest is great for team managers who want to beware of burnout on their team. This tool gives you a quick, visual overview of the time your reps have spent working, and who is getting close to their capacity. You can also get a breakdown of the projects your reps were working on while tracking their time.

Build your essential remote sales stack

With over 50 tools in this list, how will you organize your team with the right sales tools to make them more productive?

The goal is to find the tools that best adapt to your sales process and team needs. For example, find the outreach tools that function well with the channels your team sees the most success with. Choose a communication tool that works for your team, whether they prefer

synchronous or asynchronous communication. And pick a CRM that is built to empower remote teams, and allows you to call, send emails, SMS, and run video meetings without ever breaking a sweat.

Want to learn more about succeeding at remote sales? Looking for tips and advice to share with your team? Check out our mega list of remote sales tips in the next chapter.

FIVE

41 remote sales tips for reps and managers to get the job done

Here at Close, we've been running remote sales (inside a fully-remote company) since 2014.

More than that, we've helped thousands of teams around the world transition to remote sales successfully, and in this chapter we're going to share some of our best remote sales tips to help you **exceed your sales goals**.

stakeholder again. Resurface stagnant tasks. Don't ever assume people are up-to-date and in sync unless you get explicit confirmation.

Live by this mantra: if you're not following up with someone, your competition is.

 *Pro tip: Since **Close CRM integrates directly with Zoom**, you can schedule, set up, run, and review meetings in one place. Also, you'll get an alert message inside your CRM when a meeting is coming up, helping you stay on track with your remote sales meetings.*

2. Be respectful of your prospects' time

We know that remote work can be somewhat crazy. And it's true, sometimes time will get away from us. But as a remote sales rep, you need to be extra vigilant with your prospects' time. Be on top of any upcoming meetings by setting up reminders. You can also ping your prospects with quick reminders, and thus **preempt no-shows** with a friendly confirmation the day before a meeting.

3. Make recordings of all your video meetings

Also, sales reps can keep recordings of their video meetings to go back and watch their prospect's reactions to different phrases or arguments, or get a better feel for how the meeting really went.

4. Communicate with clarity

When relying on text channels like Slack or email, always over-communicate. Use very clear, unambiguous language. Don't be afraid to reiterate or ask for clarity. Written communication tends to lack a lot of the nuance compared to spoken words. If you fear there might be miscommunication, schedule a quick video call and set the record straight.

5. Take advantage of cloud collaboration

Use online collaboration tools like Google Docs, Dropbox, and Office 365 whenever possible. This will cut down on versioning hiccups, work overlap, and keep everyone in sync.

6. Make eye contact on video calls

Although we lack the strong connection that comes with talking in-person, using video on your sales calls and making sure to make 'eye contact' by looking at the camera can help you build trust with prospects, even though they've never really met you.

Another hack to simulate eye contact on video calls is making sure your webcam is at eye-level. If you're using your computer's built-in webcam, set your computer a bit higher so you're not looking down your nose at your prospects. Or, use an external webcam that can mount on your monitor.

7. Send an agenda before your sales calls

In the digital world, it's easier for prospects to get distracted and for the conversation to stray. By **sending an agenda before the call**, you can make sure your prospects are on par with your gameplan and ready for a meeting that's truly productive for both sides.

8. Make connections and nurture relationships online

If you're selling remotely, chances are slim that you'll casually bump into your network as you go about your daily life. So, learn to rub shoulders with your peers and potential prospects online.

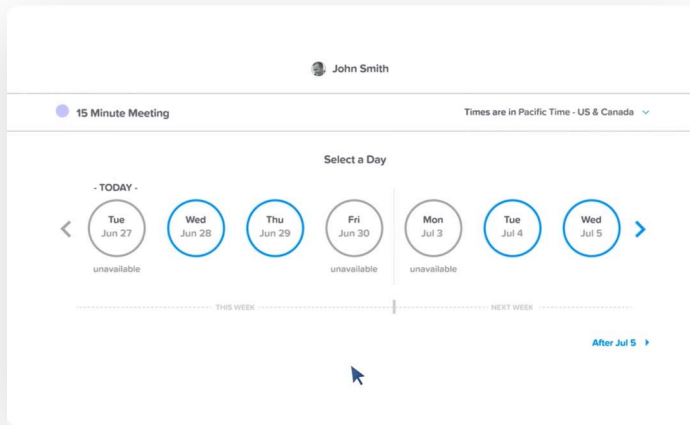
For example, join relevant LinkedIn groups or Slack channels, start posting more and engaging with posts on LinkedIn, and set up virtual coffees with people in your network to get some good one-on-one time.

9. Be aware of time zones when communicating with your prospects

Remote salespeople often speak to prospects who are not in their time zone. As a salesperson, it's your job to be aware of what time it is for your prospects before you set out to call or send emails. Whether you're talking to someone across the country or across the ocean, make sure to check what time it is there.

You can do this easily by setting up multiple location clocks on your phone's home screen, or by using a scheduling app like **Calendly** to set

meeting times that make sense for everyone involved.



10. Manage your energy, not your time

Managing your time is important, and we've got calendars for that. Managing your energy is even more important. Structure your day and your schedule in a way that takes the most advantage of the energy you have.

For example, instead of forcing yourself to sit at your desk for a certain number of hours during the day, set a schedule to get up and go for a quick walk to boost your energy. Focus on methods that work for you personally to make the most of the energy you have at different times of the day. Just knuckling down and forcing yourself to do the work is one way of doing things, but to stay consistently productive and build a sustainable work schedule, personal energy management is key. I talked

about this in more detail in [episode 294 of the Startup Chat with my friend Hiten Shah](#).

11. Start your day with the most difficult tasks

Set time aside right at the start of the day to dig into activities that advance your sales, such as [prospecting](#), [cold calling](#), or meeting with prospects. This focuses your mind on work from the get-go, instead of letting yourself get distracted with other, less important tasks.

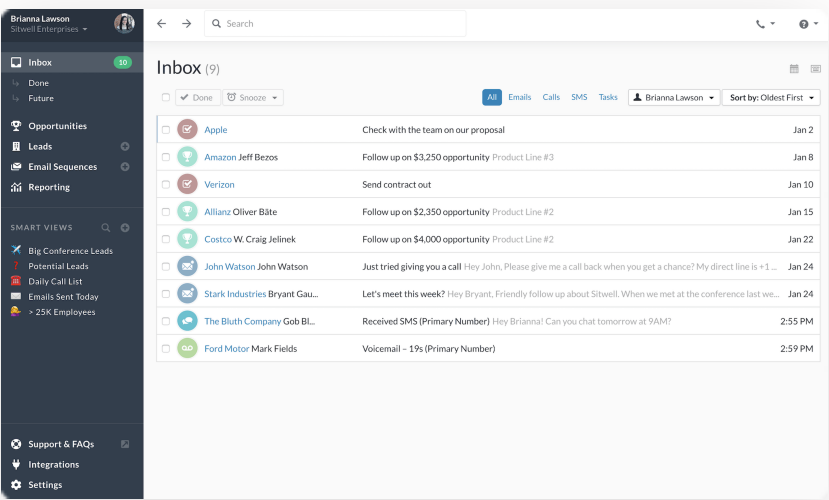
12. Find creative ways to add personality to your communication

In remote sales, it's often not possible to pop in and say hello at the office of your prospects. So, try new, creative ways to add personality to your communication. For example, write emails like you talk, with pizzazz and personality. Or, include a personalized video to your prospects so they can hear you talking to them.

13. Make good use of content to keep conversations flowing

Your company is probably producing loads of top-notch content to attract your target audience. Whether that's in-depth blog posts, guides, free tools, or anything else, are you taking full advantage of these resources? Get familiar with the content your company is producing, and use that content to provide real, genuine help to your prospects. Give

them something they can learn from, and they'll develop more trust in you and your company.



14. Carve out time at the end of the day to plan for tomorrow

At the end of your workday, which tasks did you accomplish? Was there anything leftover that should get pushed to tomorrow? What tasks are due tomorrow, what meetings do you have scheduled, and what calls do you need to make? Set aside just 10 or 15 minutes at the end of each day to go over what you've accomplished and plan for the next day. Then, in the morning, you can dive into the most urgent tasks.

 *Pro tip: Close helps reps organize and focus their tasks with their individual Inbox view. Use the Inbox to check upcoming tasks and plan your day.*

Set a status

×

😊 What's your status?

For Close

📞

On a call — 1 hour

🙄

DND — 4 hours

🤒

Out sick — Today

🌴

Not working today — Today

🍱

Lunch — 1 hour

Automatically updates

31

In a meeting — Based on your Google Calendar

Cancel

Save

15. Mute notifications during your focus time

When working remotely, it's easy to get distracted by the communication buzz in Slack. So, when you really want to get down and dig into some full-focus work, turn off notifications.

Block off time in your shared Google Calendar so your teammates know not to schedule meetings with you during that time, and set your Slack status to show you're in the middle of something and won't be responding to messages right away.

By setting these expectations with your teammates, you can sit and focus with notifications off, without stressing about what messages you might be missing.

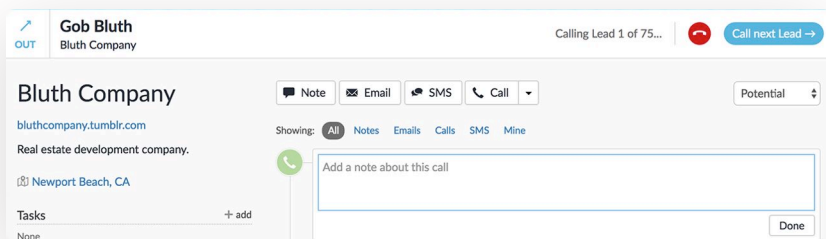
16. Make time to level-up your skills

If you were the kind of person who listened to podcasts during your commute or read books on the train on the way to work, you may notice that remote working has stagnated some of your learning. To combat this, set aside specific times for work-related learning, such as taking a walk mid-morning and listening to a podcast episode.

17. Use tools that boost your productivity

Like it or not, working from home comes with its own unique set of distractions. That's why it's especially important to maximize the time you spend working.

Use **remote sales tools** that give you the biggest results for the least investment of time, such as a **Power Dialer** that allows you to call more prospects faster, or the **Predictive Dialer** in Close CRM that only connects you to the call when someone answers. That way, you're not sitting for hours listening to dial tones, rings, and voicemail messages: You only hear the "Hello".



18. Learn how to manage-up

Remote work forces all of us to be more intentional about how we communicate. Since managers have less context and data on their team, individual reps need to take more responsibility to manage-up. As a rep, have the confidence to speak up with your own ideas. Help your manager have more context by **taking the initiative** to talk about what's working and what's not for you. This will help you level-up your sales career.

19. Use virtual mind-mapping tools to brainstorm with teammates or create more interactive sales meetings

There's nothing like pulling out the whiteboard and drawing up a visual version of your ideas. This kind of collaboration gets everyone involved, whether you're brainstorming with your teammates about better ways to pitch or mapping out key pain points and solutions with a prospect. Tools like Miro allow you to create mind maps, workflows, and charts alongside your team, working synchronously inside the virtual whiteboard.

20. Make product demos more engaging

Most sales reps are still terrible at giving a great product demo remotely. I can't tell you how many demos I've had to interrupt after two minutes because the presenter was just guiding me through a list of pre-defined talking points and screens that weren't relevant to me at all. [Learn how to design and deliver](#) a powerful demo, by starting with something that really wows the prospect, keep your demos under 15 minutes total, and learn how to captivate your prospects' attention.

21. Learn proactively

Be humble and vulnerable to admit you don't know everything. There are other reps on your team who are probably better than you at certain aspects of the [sales process](#): So, proactively ask for help or jump on a call with them to see how they do it in real life. Also, speak up to your sales manager when you feel you need coaching or training on a specific topic. They'll appreciate the guidance when it comes to your next coaching session, and your willingness to learn will help you become a more valuable member of the sales team.

20 tips for sales leaders managing virtual sales teams

Sales managers working remotely have less context on how their team is doing emotionally, mentally, and even physically. So, everything a remote sales manager does must be more intentional and planned. A good

remote sales manager is organized, on the ball, and using the right tech to track the right activities and metrics.

Let's dig into some specific ways to do all that:

22. Promote separation of work and personal life

Since everyone "lives at the office" so to speak, it's easy to blur the lines between work and personal life. As a sales manager, make sure you respect time off and encourage people to get offline after a long day.

23. Record your virtual sales meetings

Getting everyone in a remote meeting can be tricky. If some people can't make it, video record the meeting and publish it internally for later viewing. This will also help remote reps who take time off for themselves to resist the temptation to jump back into work 'just for one quick meeting'.

24. Keep a tidy (virtual) workspace

The cloud is your new workspace. Make sure all documents and sales enablement resources are organized and accessible to stakeholders. Instead of storing files locally and sharing via email, upload the file to the cloud and send links. If a file or comment is relevant to a specific task, drop it in your project management app (like Asana) instead of sharing it in Slack.

Of course, for sales managers a regular pipeline review meeting is necessary. Regularly purge your CRM and **sales pipeline** of deals that are cold or dead. This empowers your reps to focus only on the deals that are more relevant right now.

25. Start (and end) meetings on time

Remote life can be hectic. The last thing you want to do is delay a meeting for someone running late from an errand. Start your **sales meetings** on time and worry about absentees later. It's also important to end meetings on time. Employees aren't in the office, but they still have tasks to get done and don't have all day to sit in overdrawn meetings.

26. View PowerPoint as your friend

Zoom and Google Meet have powerful screen share functionality—take advantage of it. When leading a meeting, create a PowerPoint as a visual aid for your talking points. It'll make communication more clear, plus you can make the document available later for anyone who missed the meeting.

27. Secure your data

Employees might be working at home, at a coffee shop, or in a coworking space, and this makes your data much more vulnerable than usual. While the location and work schedule is more relaxed with remote employees, security shouldn't be. It's critical that you keep your data safe and secure.

Require everyone to use a password manager, 2-factor authentication, and VPN where necessary.

28. Be structured, but also be prepared to adapt

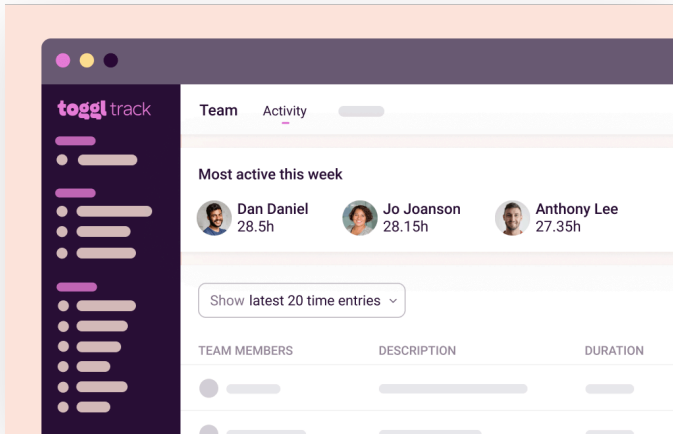
Employees need strong leadership and structure, especially if they're not used to working remotely. Create a team-wide gameplan every two weeks and keep everyone informed. Do your best to stick to it, but be prepared to adapt and adapt quickly where necessary.

29. Make expensing easy for your employees

When team members transition to a remote workspace, they may need to purchase dongles, a headset, office supplies, and more. Make sure there's an easy way for them to expense the company or for the company to purchase on their behalf.

30. Do proactive wellness checks

Without much facetime, it's hard to gauge how people are doing emotionally: Are they overwhelmed? Are they exhausted? Be proactive and check-in with your employees regularly to make sure they're okay. You can also use time-tracking tools like **Toggl** to check how much work your team is really doing and be aware of when a rep may be approaching burnout.



31. Don't use instant messaging as the be-all-end-all of communication

Slack is perfect for quick, off-the-cuff communication and collaboration. But with important communication, tasks, or projects, rely on Asana, email. This will be especially helpful if you need to backtrack at a later date.

32. Document your remote work policies

The key to working well remotely is making sure that everyone has a shared understanding of the company's remote working expectations. Document your remote work policies and make them accessible to everyone.

33. Focus on results, not on hours

While it's normal to expect your employees to work a certain amount of time per week, remember that time spent working doesn't equal time spent productively. That's why it's more important to focus on the results of your remote sales team rather than the actual hours they spend on the job.

Use your CRM (like Close) to **track activity metrics**, such as the number of cold calls made, emails sent, and new leads added. When you compare this activity week-over-week or month-over-month, you'll be aware which reps need an extra boost to be more productive.

Steel Efti
Wayne Enterprises

Inbox

Opportunities

Leads

Email Sequences

Reporting

Activity Overview

Activity Comparison

Status Changes

Explorer

Sent Email

SMART VIEWS

Daily Call List

Qualified Lead Follow-up

No Response to Agreement

Big Conference Leads

Potential Leads

Emails Sent Today

> 25K Employees

Support & FAQs

Integrations

Settings

Activity Comparison

Last Week — This Week

All Leads

All users

Outbound...

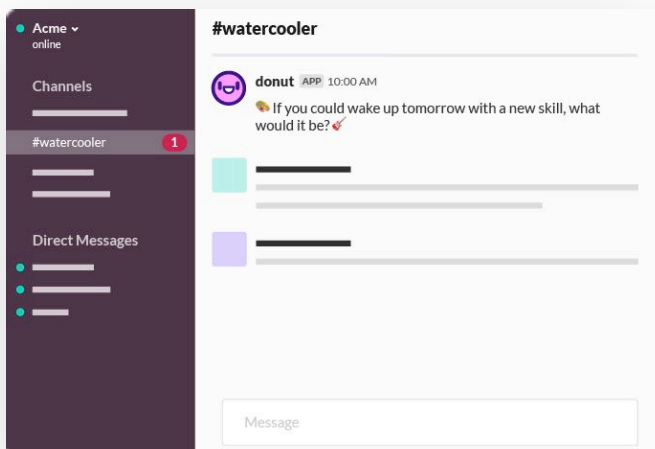
Team Members	Outbound Calls	Inbound Calls	All Calls	Sent Emails	Received Emails
ALL USERS	ALL TYPES	ALL TYPES	AVG. DURATION	ALL TYPES	ALL TYPES
1 Waiano Akarana	961	34	1:56	392	283
2 Sophie Asveld	836	915	2:34	472	333
3 Sammy Lawson	809	864	4:32	866	809
4 Ohta Kin	768	800	6:12	706	768
5 Miglena Tadic	729	793	1:56	678	729
6 Ivan Morales	629	739	2:46	673	629
7 Iraj Pirdoost	416	706	1:45	627	416
8 Gauthier Drevitt	294	635	1:57	393	294
9 Fariba Mirzaili	136	608	1:56	163	11
10 Aneta Skodová	124	283	4:32	159	124
11 Rustem Tolstobrov	119	257	1:35	127	119
12 Boon-mee Yao-Yun	77	234	0:59	121	77
13 Chandrashekar Ganguli	45	37	3:63	108	45
Total:	449	448	466	108	521
Percentage change:	5%	5%	5%	5%	5%

34. Don't expect your team to work 9-5

Remote work equals autonomy, and that's one reason many people are attracted to it. High-performing remote salespeople work when they are most productive and able to focus: One person may start at 6 AM because it allows them to work while others in their household are sleeping, or another person may take time off in the afternoon to be with their family and log back on after the kiddos are in bed. Be flexible with the schedules that work best for your team.

35. Set up a virtual watercooler

Watercooler conversations are a natural part of the office and you can replicate it in Slack. Create a dedicated channel for your team to chat about non-work related topics. You can also set up virtual happy hour video calls to encourage teams to gather online with no agenda. Hang out, chat, and enjoy each other's company!



Tools like [Donut](#) are meant to facilitate and improve team building as we saw in the last chapter. You can use tools like these to get the conversation rolling and help your virtual sales team connect, even though they're apart.

36. Find your optimal sales team structure

Sales teams can be organized in different ways, and each of them can have their advantages. The traditional "island model", where each rep is responsible for the every step of the sales process. This can work well if you have a basic, more transactional sales process that doesn't require much managerial involvement. The "assembly line model" is where you have specialized roles within your organization that pass on prospects as they go to the next stage. This often works well for large organizations that put an emphasis on predictability and scalability. The "pod model" where you have multiple teams that each are made up of specialized roles, which allows for a lot of flexibility and agility. You can learn more about [structuring your remote sales team here](#).

37. Encourage your team to set 'focus time' blocks in their schedule

While answering emails and responding to messages on Slack is important, make sure your team has leeway with their own focus time. Don't force them to interrupt their workflow just to answer a quick message from a teammate (or from you). Encourage your team to set blocks of time in their schedule when they're unavailable for calls and offline for messages: This is their 'focus time'.

38. Set the right KPIs and measure metrics that matter

To keep your dispersed, remote team aligned, make sure that everyone has a clear picture about where you are now, and where you want to go, both on an individual level and on a team-wide level. That's where defining KPIs and deciding which sales metrics to track is crucial. With the abundance of data that's accessible at the click of a button, many sales managers fall for the "more is better" fallacy. In fact, if you feed your team too many metrics, they'll eventually stop caring about any of them. Instead, focus on a few metrics that are a really good indicator of how your team is performing and what needs to be done. [Check out our guide on sales KPIs.](#)

39. Leverage integrations and automations

Use Zapier to connect tools and get more of the background work done automatically. This will set aside more time for your sales team to do work that actually translates into sales. Check out the integrations you can use to level-up your sales team with Close.

40. Encourage your team to celebrate each other's wins

While you can't ring a bell on the sales floor anymore, your remote team can still do much to celebrate each other's wins. It's up to you as a sales manager to encourage those mini-celebrations. For example, you can

connect Slack to your CRM, so every time a new deal is closed, a celebration message goes out to the team:



Close Bot APP 2:10 PM

Woohoo! A new deal just closed 🎉

Lead: Bluth Company (Sample Lead)

Contact: contactn name

Value: \$3000.0

Won by: Bryan Helmig

[View this customer in Close](#)

Let's celebrate with a gif party in this thread!

41. Build a predictable routine for your remote sales team

Salespeople tend to be extroverted, and many suffer in a remote setting because of the isolation that inherently comes from working from home. As a manager, it's your job to make sure this doesn't happen. By building a predictable routine for your sales reps to meet, you'll encourage them to be regular communicators with the team. Aside from your daily or weekly standups, set up regular meetings to dissect a specific call recording, go over sales scripts, practice overcoming objections with each other, and more. And connect with your team on a human level too—show your reps that **you've got their back when they're going through a**

personal crisis. This will help the team build camaraderie, and build their collaborative spirit.

The right remote sales tips to build an ultra-performing team

Remote sales teams can be just as successful and happy as in-office teams. In fact, when done correctly, remote sales teams can actually perform more productively than their in-office counterparts.

So, take this ultra-long list of remote sales tips and turn them into your remote team's best practices. Build a process that works and stick with it.

Want to learn more about how other remote sales teams are crushing it from home? Check out the next chapter for even more resources from today's top remote teams.

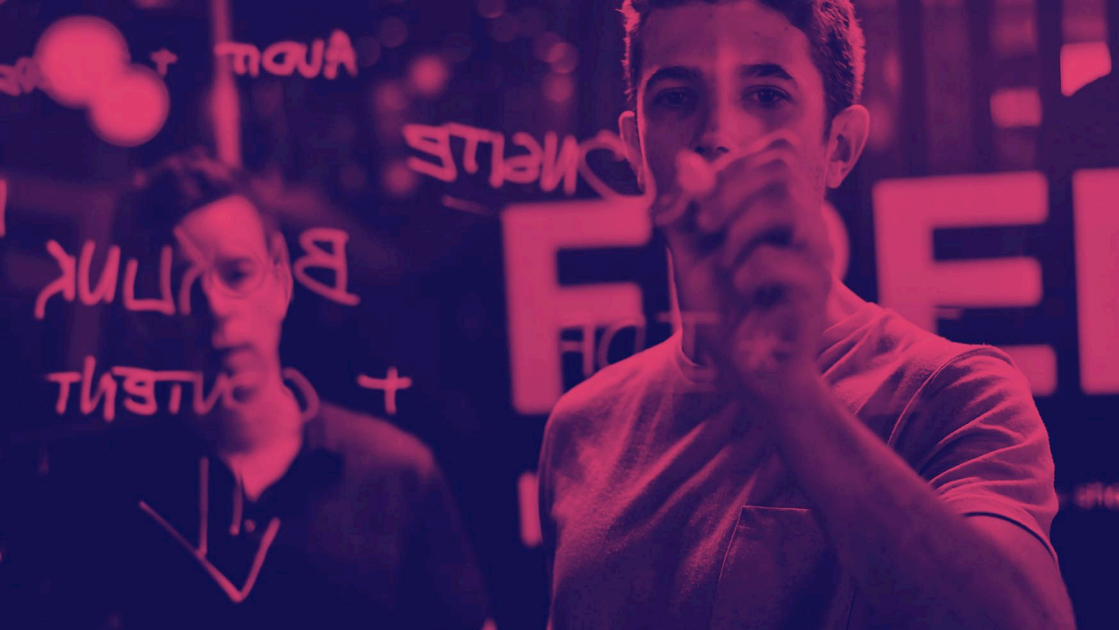
SIX

25 remote sales resources to close deals and manage teams better

When you want to be an expert, you need to learn from the experts.

So it makes sense that, if you want to become an expert remote sales manager, remote salesperson, or remote exec, you should take your cue from the people who have already been doing it for years.

In this chapter, we're going to give you a list of the absolute best resources available for remote sales workers, no matter what your role is.



10 remote sales resources for managers leading remote teams

For remote sales managers to successfully lead their teams, they need to learn the right skills to be aware of what's happening with their team without micromanaging, build culture and camaraderie intentionally, and coach with style.

Check out these 10 resources that help you do just that:

1. The ultimate remote sales guide for teams who want to keep crushing it

Resource Type: Guide

How do you build a remote sales team? How do you manage and coach your reps remotely, set goals, how to measure performance, what tools do you use to empower your team to Close those deals? We cover all this, and more, in the other chapters of this guide—remote sales knowledge we've gained ever since we started selling remotely back in 2014.

2. Master Managing Remote Teams

Resource Type: Online course

This paid course includes 6 hours of video content, 20 assessments, and a dedicated community of other managers. For new remote sales managers, this course helps you get on your feet and advance your leadership skills in a remote setting.

3. The keys to maintaining a great culture within a remote sales team

Resource Type: Article

Team culture got you down? This is a mini-guide to keeping your team culture top-notch, even if your team is fully distributed.

4. Remote Work FAQs: Answers from WFH Experts

Resource Type: FAQ

This online WFH forum references loads of valuable articles and resources on specific WFH topics. Also, you can ask your own questions and get answers from WFH experts.

5. The ultimate guide to remote work

Resource Type: Guide

Zapier is a 100% distributed team, so their advice for working from home and managing remote teams is built from proven experience. Learn the pros and cons of working across time zones, how extroverts can still thrive in a remote setting, and how to avoid remote burnout.

6. How to build and manage a remote sales team

Resource Type: Webinar

This webinar with Ryan Burke of InVision, Salvatore Tocco of Process Street, and Nick Persico of Close digs into the proven methods that these remote companies are using to build and manage their sales teams remotely.

7. Practical Tips to Do Remote Sales Effectively

Resource Type: Article

This in-depth article goes from the technical side, such as setting up your remote team with the right equipment, to specific sales activities, such as outreach and closing.

8. The Ultimate Guide to Remote Team Building Activities

Resource Type: PDF

Team building for distributed teams is a whole new world. This guide dives into specific ways to keep your virtual sales team engaged and happy.

9. The Definitive Guide to Remote Sales Coaching

Resource Type: PDF

Looking for new ways to coach your remote sales team? This guide shows you how to coach individuals and teams, what tech you can use to coach, plus advanced tips.

10. The Remote Sales Management Bundle

Resource Type: PDF bundle

This bundle includes three PDF downloads: A checklist for call coaching, a guide for discovery calls, and a competitive selling cheat sheet.

8 resources for remote salespeople to improve virtual close rates

For salespeople, working from home is generally the same as working in an office. After all, reps still need to **generate leads**, talk to prospects, have meetings, and close deals: The only difference is that everything must be done virtually.

These eight remote sales resources dig into the mechanics of succeeding at virtual sales, as well as some ideas on keeping up your motivation and productivity while working from home.

11. The Expert Guide to Remote Video Sales Calls

Resource Type: PDF

A guide with a vetted, end-to-end approach to using video in your sales calls and closing more deals. Everything you need to close more deals on Zoom. Includes step-by-step instructions and checklists that help you nail every virtual demo.

12. Remote Selling Resource Hub

Resource Type: Guide

This resource hub includes a video training series for virtual sales reps, tips and tricks from sales enablement pros on remote selling, and continuously updated virtual events and webinars on virtual sales.

13. Winning the emotional war in sales

Resource Type: Article

Especially relevant during the stressful times we're living in, this article is built for salespeople who want to learn specific strategies to improve their mindset for remote selling.

14. What is Remote Selling?

Resource Type: Guide

This quick guide includes checklists to help you prepare for virtual sales meetings, keep your tech in check, and more.

15. Remote Selling Hub

Resource Type: Guide

Are you selling from the sofa? Learn tips from GetAccept to do remote sales right, with unique strategies, selling via video, and a handy checklist.

16. 7 Habits of Master Rapport-Builders (Remote Edition)

Resource Type: PDF

Having trouble building rapport over video or calls? This guide is here to give you talk-tracks, tips, and examples to build real rapport with your prospects (not just small talk).

17. Remote Work Essentials

Resource Type: Online course

For telecommunicating employees starting from 0, this free course gives you tips on video conferencing, remote communication, and staying motivated.

18. Top Tips from Sales Experts to Ace Remote Selling

Resource Type: Article

This article is full of real-life tips from sales reps from around the world who have made a success of remote sales. Look for tips on using video in emails, juggling work and virtual learning, and setting boundaries.

7 top resources for sales executives to keep virtual teams on track

Sales executives set the stage for how their teams communicate and collaborate at a distance. These remote sales resources dig into the details of leading teams from afar, including how to communicate during a crisis, how to set up specific remote work processes for teams, and real advice from other remote execs on how they handle their teams from a distance.

19. Leading Sales Teams Through Crisis

Resource Type: PDF

For the ultimate resource for sales executives and leadership teams, read through 500+ pages of actionable advice from over 30 sales and SaaS leaders to survive the current crisis and lead effectively, especially for newly distributed teams.

20. 4 ways to manage remote workers when you don't know how long they'll be working from home

Resource Type: Article

Learn how to onboard and train distributed teams, encourage engagement, and adapt to changing work environments.

21. The Pyramid of Remote Team Communication Tools

Resource Type: Article

Wondering which tools will best help your team communicate remotely? This guide from fully-remote company Doist talks about the specific tools they use to keep their team connected, even when spread across 15 time zones.

22. The Art of Async: The Remote Guide to Team Communication

Resource Type: Guide

Remote teams need to communicate: But should they communicate synchronously or asynchronously? That's what this guide from 100% remote company Doist intends to find out.

23. How to communicate apart while working remotely

Resource Type: Article

If you're wondering how to develop healthy communication with your remote sales team (and strengthen bonds with your customers) this article has the answers.

24. The Best Advice for Remote Work Success From 10 Global Teams

Resource Type: Guide

With advice from 8 companies that made the shift (including Zapier, InVision, Atlassian, and Buffer), this guide digs into debunking remote work myths and tips to build better communication and company culture for remote teams.

25. WFH Manual

Resource Type: Microsite

This is a live and growing collection of tips, ideas, best practices, and experiences of people working remotely.

Learn from the best, and become a better remote sales team

We've been sharing our remote sales advice ever since we ourselves made the shift in 2014. We hope the strategies, principles, tactics, tools and tips we've shared in this guide will be of value to your team too.

In this guide, we've discussed how to build the remote sales team of your dreams, how to lead and motivate that team effectively, the tools and tips you need to succeed, and now the resources to help you continue learning.

Best of all, if you've dissected the other chapters in this guide, you've been benefiting from almost 7 years of experience working and managing across timezones, plus you've got this list of the best remote sales resources on the web.

The rest is up to you.

Now that you've learned from the top experts in remote sales, take all this information and start implementing it.

Build your own remote team. Create a results-driven culture of friendly competition. Keep closing deals.

Go get 'em!

