



# REAL-TIME SALES AND MARKETING

The Future of  
B2B Sales



# Table of contents

01 Introduction

3

02 Real-time everything

4

03 A brief story of real-time sales and marketing

8

04 5-step guide to real-time sales and marketing

11

05 Summary

29

# Introduction

**A sale happens when a need is met. And a need arises when there's a change. This means that a sale starts with a change.**

Business needs are constantly in flux. Mergers, acquisitions, new hires, increase of revenue, loss of revenue... The only constant is change.

Business-to-business sales responds to such needs. The question for salespeople is, how do you know about those needs? And more importantly, how do you stay on top of these changes so you can land in the right place at the right time?

The answer, my friend, is data. Real-time company information has the potential of instantly revealing the businesses that need your product or offering, and provide the information you require to be relevant. Once you only connect with companies when there's a data-backed reason for you to be in touch, and you tailor your offer according to your potential customer's

current situation and needs, you'll significantly improve your call-to-meeting hit rate, the meetings you have, and your overall sales revenue.

That's the idea behind real-time sales and marketing.

After reading this ebook, you'll know how to set up a real-time sales and marketing strategy and understand what is needed to make it the most profitable stream of revenue in your business, by simply tuning into the needs of your prospects or customers.

In this ebook, we'll go through:

- What is real-time sales and why should you care?
- How we at Vainu do real-time sales and marketing
- A 5-step guide to implementing this strategy

**Real-time company information has the potential of instantly revealing the businesses that need your product or offering.**

# Chapter 1

## Real-time everything

# Real-time everything

## You've heard this one before.

Today, buyers have all the power. They're more knowledgeable, self-directed, and informed than ever before. They've read reviews and watched videos. They've spoken with their peers and researched your competitors. By the time they get to your website, many buyers are well down the traditional funnel—now it's a non-linear journey. So, given that they've done their homework when buyers are ready to talk, they're really ready to talk.

This new B2B buyer demands a lot, too. With the growth of the on-demand economy, customers are used to things happening instantly. They want real-time experiences. This means you need to engage with your customers when they most expect it: immediately. Not days or weeks later, right now. Your

## Real-time sales is not just about speed. It's about real conversations, too.

prospects don't want to fill out a form and wait for a salesperson to call.

But real-time sales and marketing is not just about speed. It's about real conversations, too. The highly personalized services of business-to-consumer brands are driving buyers to expect the same

personalized content and interactions when it comes to business-to-business sales.

As a result, the key to real-time sales is being proactive: anticipating the buyer's need

and reaching out when time is ripe. Salespeople must show a clear understanding of decision-makers' needs, wants, and desires, so they can share tailor-made content, and communicate in a personalized way. In other words, to be relevant in every step of the sales process.

The key to real-time sales is being proactive: **anticipating the buyer's need** and reaching out when time is ripe.

### Say again, what's real-time sales?

Simply put, real-time sales is a method of using real-time company information in every sales interaction to uncover best-fit prospects, reveal the ideal timing to reach out, and create relevant messaging in any sales interaction.

In this recipe, the secret ingredient is real-time company information. Salespeople can do a lot, but they're not magicians. Staying on top of each account, knowing where and when to be at all times is of heroic dimensions. Fortunately, there's no shortage of

information on nearly any company in the world these days. This information is what can take salespeople from a canned pitch to relevancy in sales, from being perceived as a nuisance to being a helping hand.

Most businesses these days collect tons of customer data. They do it when a user visits their website and leaves an email address, and they do it when a sales rep has had a few meetings with a prospect.

There are different categories of company information:

- **Internal operational data:** Usually, CRM data. If you've had calls or meetings before, maybe even past sales. What were the outcomes of those activities?
- **Behavioral data:** Often collected via marketing automation platforms. Information such as the activity of leads on your website and their interaction and engagement with your content.

## CHAPTER 1: REAL-TIME EVERYTHING

- **External company data:** Anything happening related to the prospect that gives hints of particular needs. This could be real-time company information provided by a sales intelligence tool, like Vainu, informing you of trigger events such as a new decision-maker, mergers/acquisitions, or open positions.

Combining these three types of data effectively will allow you to succeed in real-time sales and in optimizing all sales activity in your organization. You'll see improvements in hit rates: from prospects to opportunities, and from opportunities to closed deals. These three data sources are interesting on their own, but when used together, they make up a powerhouse that will improve your hit rate and boost conversion.

### What's real-time sales and marketing?

Real-time sales is a method of using real-time company information in every sales interaction to uncover best-fit prospects, reveal the ideal timing to reach out, and create relevant messaging.

Similarly, real-time marketing is a method of using real-time company information when building workflows and marketing automation to improve segmentation, optimize timing, and create relevant messaging.

## **Chapter 2**

**A brief story of real-time  
sales at Vainu**

# Vainu and real-time sales

**At Vainu, the concept of real-time sales has always been close to home. In the early days, we tried many ways of selling. Some were good, others were average, and some... well, just terrible.**

But even as a small startup selling its product to anyone, we believed that being truly skilled at sales is something to be revered. It's not about targets and quotas; it's about helping people. It's about being relevant.

We knew that data would be the way out of irrelevancy. Data would tell us the who, when, what, and why of sales. We didn't call it real-time sales back then, but that was our mindset.

It took us some time to get there. Earlier, we only had two types of revenue streams: traditional outbound sales, mostly based on cold calling, and warmer inbound leads, based on digital and content marketing.

Outbound sales meant our salespeople spent much of their time cold calling companies that (loosely) fit our ideal customer profile (ICP). Call, book a meeting, demo, negotiate, and close the deal. That was our sales process. It worked, for the most part. Our hit rate wasn't too bad, and this strategy served our initial growth pretty well.

Still, we knew this model wouldn't be sustainable in the long run. We had to be more targeted, and so we started to analyze the characteristics of our most recent customers. What was their situation before they signed with us? Why did they need us? What triggered that need?

## **A real-time sales team is born**

The idea for a real-time sales team came while meeting Intercom in 2017. They and other like-minded companies had been creating teams focused on responding to triggers on their website

## CHAPTER 2: VAINU AND REAL-TIME SALES

(inbound leads) in real-time, based on the finding that reacting quickly to interest increased the likelihood of a sale. We had been working similarly, but not through a dedicated real-time team, and wanted to try it out.

**After six months, our real-time sales team had a 3x better hit rate booking meetings AND closing business than our traditional outbound sales team.**

The real-time sales team we founded focused on real-time conversations with both our inbound leads and even companies going through these trigger events.

When implementing this mindset internally however, we took things one step further, reacting in real-time not only to someone interacting with us, but also to external triggers: documented changes happening within companies. The

After six months, the results were eye-popping: the real-time sales team had a 3x better hit rate booking meetings AND closing business than our traditional outbound sales team.

From that moment on, we've expanded our real-time sales approach from one single team to all salespeople in our organization: how we operate is based on changing data that's as fresh as possible. Data tells us exactly who we should be talking with, what we should be talking about, and when we should reach out to them. We put all the relevant information in front of a rep when they're having a conversation, and they tailor the conversation based on that information.

Continue reading because the rest of this ebook is going to explain in detail how any sales organization can tap into company data and establish a real-time sales mindset that yields better results.

# Chapter 3

**Get started with  
real-time sales**

## **Take a deep breath, time to roll up your sleeves.**

Now that you know the what and understand the why of real-time sales, it's time to put the theory into practice. We've compiled a five-step guide to preparing your organization for a real-time sales methodology.

### **Step 1: Align sales and marketing around data**

Rule #1: Teamwork. When sales and marketing are perfectly aligned, miracles happen: shorter sales cycles, higher conversion rates, and ultimately, increased revenue. Heck, salespeople and marketers might even grab lunch together instead of bickering over lead quality. That's a Christmas miracle, isn't it?

Such strong alignment, also known as smarketing, is the cornerstone of a real-time sales strategy.

Effective communication, shared processes, and unified content and collateral will help crystallize such an alignment, but fresh and reliable data is what will glue both teams. Data will provide a common language. Always align sales and marketing activities around real-time company information first.

We wrote earlier that today's B2B buyers have all the power and are more autonomous than ever before. They enter the funnel at any stage, and they don't follow a linear customer journey. They don't care if they interact with sales or marketing—they care about the quality of the conversation and the relevance of the interaction. According to Forrester research, 60 percent of the buying cycle is over before a sales rep even steps into the picture. As a consequence, sales and marketing need to work in sync together. For that, both departments need to share the same audience, the same funnel, and the same tools and technology.

## CHAPTER 3: GET STARTED

### Your tech stack

As a real-time sales pro, you need to have the following tools in your tech stack.

**Customer Relationship Management (CRM)** - CRMs have grown to become the backbone of any sales organizations. These incredibly complex systems include countless features designed to help companies and salespeople track and optimize their entire sales process. The CRM is the place where your sales reps will look for information on prospects and log their daily activities. Thus, correct and up-to-date information is critical.

**Sales intelligence software** - Fortunately, there's a wealth of tools that can help you maintain a clean and tidy CRM without relying on the manual input of salespeople. That's sales intelligence. This category of software helps find, monitor, and understand information on prospects' and existing clients' daily business. A sales intelligence tool worth its salt will automatically connect to your CRM to bring updated and expanded company data on your contacts.

**Marketing automation** - This refers to the tools, processes and technologies that help execute marketing tasks in a more streamlined and scalable way, enhancing the productivity of your team. Marketing automation helps with lead generation, nurturing, and scoring, as well as with measuring overall ROI on campaigns.

## CHAPTER 3: GET STARTED

A real-time sales and marketing strategy lies somewhat in between marketing and sales, and helps build a robust bridge between these sometimes somewhat distant teams. For that bridge to have a solid foundation, constant and effective communication is critical.

To pave the way for real-time sales with strong sales and marketing alignment, you want to follow these three prerequisites:

### **1. Define a common target buyer: Your ideal customer profile**

Real-time sales works. But it will most likely be a waste of time if you're selling to or directing your marketing

efforts on the wrong companies. Yes, closing a deal is an exciting and rewarding feeling, but in the long run, bad-fitting customers will cost your account teams a lot of headaches, and your company a lot of money. It might even damage your reputation if you're selling to customers when they don't need your solution.

Align your sales and marketing around the same target: your ideal customer profile (ICP). This is a description of a fictitious company that gets significant value from your product or service and provides substantial value to your company in return. A company matching this description should be a potential customer that stays with you for a long time and has a strong lifetime value. Simply enough,

**When the definition of your ideal customer is crystal clear for your whole company, the tasks, routines, and goals of both your marketing and sales teams will be coherent with it.**

**When a marketing automation tool and a CRM are fully integrated, data can automatically be synced between them, and all teams have a complete picture of the buyer lifecycle**

your sales and marketing efforts should be focused only on customers within your ideal customer profile.

goals of both your marketing and sales teams will be coherent with it.

## **2. Integrate technology to use data systematically**

When two parties speak different languages, effective communication is hard. When two departments use different technologies, collaboration is hard.

Sales and marketing alignment requires a holistic approach to the software each unit needs. Their systems need to ‘talk’ to each other and share the same data. When a marketing automation tool and a CRM are fully integrated, data can automatically be synced between them, and all teams have a complete picture of the buyer lifecycle, from visitor to customer, at all times—the loop is closed. This brings several benefits:

- Sales teams can access data about the prospect’s business and online behavior in one place and

To define your ICP, gather around all relevant departments (yes, that means both sales and marketing) and take a look at your happiest existing customers: What common attributes are they sharing? What type of business are they in? What size? How tech-savvy are they? The more you know about your best customers, the easier it will be to create your ideal customer profile. And the best way of identifying the best fit companies is to use data.

When the definition of your ideal customer is crystal clear for your whole company, the tasks, routines, and

## CHAPTER 3: GET STARTED

more easily discover and understand potential patterns.

- Salespeople can better anticipate buyer pain points and proactively share content targeted to each potential buyer based on their organization and its current situation.
- Marketers can see what content works best at the bottom of the funnel, and act quickly to fill any gaps or generate more of the content that drives results.

When they can see buyers' context across the entire funnel, sales and marketing can collaborate to fix problems and do more of what yields positive results.

### 3. Unify messaging and align content

Does your sales team ever go to your marketing team, requesting certain types of content? Lucky you! This is not the case in all organizations, unfortunately.

It's not unusual that marketing teams have their agenda on what content to create for each part of the funnel - while sales sits on their own, complaining that marketing isn't giving them enough relevant resources for their sales processes.

With a unified team, or at least unified around the same goals, buyer and data, your teams will be more likely to speak the same language and communicate the same message. Sales will go to marketing and inform about new findings about their customers, and marketing will notify sales on how and when to use specific content pieces, resulting in more relevant content for your prospects.

### How to create relevant content with insights from both teams

- **Organize brainstorming sessions.** Sales reps on the field are talking with prospects every day. They know their worries, needs, and interests.



### Bring out the data: Tap into sales intelligence

From marketing automation tools to CRM systems, customer data comes in many different shapes and forms. It's not hard to find it. For example, people are likely to give you their email address in exchange for a valuable downloadable resource. Or a simple search on Google might reveal a long list of facts and figures about a given prospect. No, there's no shortage of information. The challenge is to make sense of all the information your systems accumulate.

**Log all information in your CRM and use sales intelligence to discover shared characteristics and patterns between companies.**

To derive valuable insights, you need to combine all those different sources. The whole is greater than the sum of its parts. Here's where sales intelligence tools come into play. This category of software refers to a wide range of technologies especially designed for the collection, analysis, and presentation of information that help salespeople find, monitor, and understand data that provides insights into prospects' and existing clients' daily business.

Most sales intelligence platforms integrate smoothly with common CRM and marketing automation vendors, effectively acting as the backbone of all your contact data. Allowing data to stream between all your systems will ensure the reliability and consistency of all your data. Such integration guarantees your CRM system is always up-to-date without having to put in hours manually updating basic company data.

## CHAPTER 3: GET STARTED

Therefore, sales reps can provide first-hand insights into what's cooking.

- **Have marketing join in on sales meetings.** Nothing beats direct feedback. Listening to real prospects and hearing their needs, wants, and desires first-hand will spur dozens of new ideas.
- **Coordinate the content calendar with sales.** The content calendar should be visible to salespeople, so they know what's coming and can promote new content as soon as it's out. It's also essential to keep the sales team up to date with offers and promotions.
- **Tap into the salesperson's expertise.** Salespeople can establish credibility and familiarity with their leads by writing blog posts and other pieces of content. Marketers can interview their reps and ghostwrite posts under their name.

### Step 2: Bye-bye traditional prospecting, hello real-time trigger events

Once sales and marketing are working in harmony, the next step is to find whom to sell: what company are you targeting?

Sales prospecting is a routine for any salesperson who wants to maintain a healthy pipeline. To find prospects, salespeople have traditionally use a list of companies that were segmented by a few basic characteristics, such as industry, location, and company size. It works... sort of. There's very little intelligence built into the process. As a result, wrong prospecting methods put salespeople in the uncomfortable position of speaking to people who were not interested in hearing about the product or service.

Real-time radically changes this approach. Instead of actively pursuing a list of more or less promising

## CHAPTER 3: GET STARTED

prospects, salespeople can sit and wait for relevant alerts in the form of trigger events. Simply put, a trigger event is a buying signal that triggers an action and creates an opening for a marketing or sales opportunity. For example, if you offer recruitment services, you want to reach out to a startup as soon as the company enters a new funding stage.

### **A sales starts with a change**

Nobody is harder to sell to than a prospect unwilling or unready to buy. Trigger events or buying signals indicate an opportunity for you as a salesperson to reach out to a prospect. Staying on top of these changes, and more importantly, being able to react quickly to them is essential if you want to beat the competition and be the first one to connect. A study by Forrester says, 74% of sales were won by the organisation that reached out to them first and were actually presenting a solution that was relevant to the needs of the company at the time.

Without the automation possibilities offered by a sales intelligence platform, following trigger events takes a good share of a salesperson's workday. Sales intelligence eliminates the previously manual process of locating the relevant insights you need while verifying them for accuracy and giving you a complete overview of every prospect.

At this step, real-time sales reveals its full potential. Real-time prospect lists update automatically as companies' characteristics and conditions change. Most sales intelligence tools come with notification features, alerting the users of events that can open up a window of opportunity for them within one of

**Trigger events ensure you always know who of your customers and prospects need to be contacted at what time, and with what kind of message.**

## CHAPTER 3: GET STARTED

their target accounts, or informing them of when a new company falls into the description of their ideal customer profile.

There are two types of trigger events:

- **Outbound trigger events:** Company changes such as fundings, expansions, new decision-makers, new technologies, or changes in any other data point on the company. A sale often starts with a change, so following relevant changes at customers and prospects could be the competitive advantage that you're looking for.
- **Inbound trigger events:** Inbound triggers are usually what marketers call SQLs, MQLs or Hot Leads: A contact (at a company within your ideal customer profile) that is downloading things on your website, signing up for a webinar about your offering or requesting a demo. In other terms: someone who's interacting with your content.

Consider this: A company within your ideal customer profile just took in a huge investment and expanded to a market that you're active in. Now imagine that you know that your contact person at this same company has downloaded your latest eBook and signed up for two of your upcoming webinars. How much would you pay to know all of this, exactly when it's happening? Trigger events can help you prioritize your customers and prospects, so that you can allocate your valuable time and efforts on the companies most likely to buy from you.

### Step 3: Craft pre-defined messaging and reach out

We've covered which companies to approach and when, but how do you tailor your message to your prospects? Real-time sales experts are using marketing content and campaigns to a completely

**Involve marketing to create tailored content pieces for each trigger.**

different degree than those in a traditional outbound sales process.

But why? Think about what makes someone a buyer.

When did your product or service become timely

and relevant to the prospect? For example, if you're offering recruitment services, a new funding round will inevitably open a window of opportunity for you to provide your services.

Once you know the triggers that are most relevant to your sales process, you can create a plan for every trigger event that you identified. This will semi-automate your outreach, and every time a trigger event will happen, your sales reps will know how to reach out and what content addresses the needs and situation of specific prospects.

**Reach out with pre-defined messaging**

When reaching out to a prospect, include (or create!) something special that can bring extra value for our customer, either to solve a problem for your customer or to get a little extra trust as a partner.

If one of your triggers is a new appointment to CFO, create a "starter-kit" for what they should focus on in their first 90 days in the role. Then reach out congratulating them and sharing the link to your content.

Is your trigger to find companies going through a digitization project? Give them recommendations of some tools they could use. Maybe you have an eBook that could help them!

Looking for companies when they are expanding to a new market? Didn't your colleague just host a webinar with a 5-step guide to creating a go-market strategy? Send them the recording!

### Adapt your pitch to the trigger

#### Open position

*"I saw you're hiring more salespeople! Typically the number one challenge for new hires is filling their pipeline with high-quality prospects. Would you be open to seeing how we can help your new hires hit the ground running?"*

#### Growth signal

*"I'm calling because I noticed you're expanding to a new market, exciting times! We've helped other companies find prospects most similar to their happiest customers in their current markets, and would love to show you how we could help with the expansion."*

#### New decision maker

*"Congrats on your new role as a Sales Director! We know your first 90 days is critical in setting the team up for success. We've helped people in similar situations build up their sales process from scratch, and would love to show you how we can help in practice."*

## CHAPTER 3: GET STARTED

If you are working this way, you've already come pretty far towards mastering the real-time sales approach: acting on several data points, real-time. When you only connect with companies when there's a data-backed reason for you to be in touch, and tailor your offer according to your potential customer's current situation and needs, you'll significantly improve your sales figures.

### Step 4: Create tailored workflows for each trigger

When adopting a real-time sales strategy, our best recommendation is to create tailored cadences for each trigger event, i.e. workflows where you're approaching the prospect in the best way possible for that specific situation. Let's show an example of how you can approach a prospect that just hired a new decision-maker:



## CHAPTER 3: GET STARTED

### Example of workflow

# Trigger event: New CEO appointed

1. Reach out to the person and congratulate them on the new role. Introduce yourself and explain how you're helping others in similar situations to be successful in their first 90 days in the role. To tailor your message more, share relevant content to help them in that specific situation. Maybe you or your marketing team can create a starter kit for a new CEO.
2. Once you have a conversation line open, suggest a meeting to explain

how your product or services fits into their goals. In this session, tailor the presentation around that situation and the needs they've mentioned.

3. If any additional news or changes happen during the sales process, you'll have a new opportunity to reach out interact. Let's say the prospect company hires more salespeople: message them and comment on the job ad and potentially share more content that supports the topic. Maybe you can make a better, more suitable offer? Consider also inbound triggers. If a stakeholder at the prospect company reads several of your case studies, include them in the conversation.

4. Ultimately when you close the deal, you have an apparent reason behind

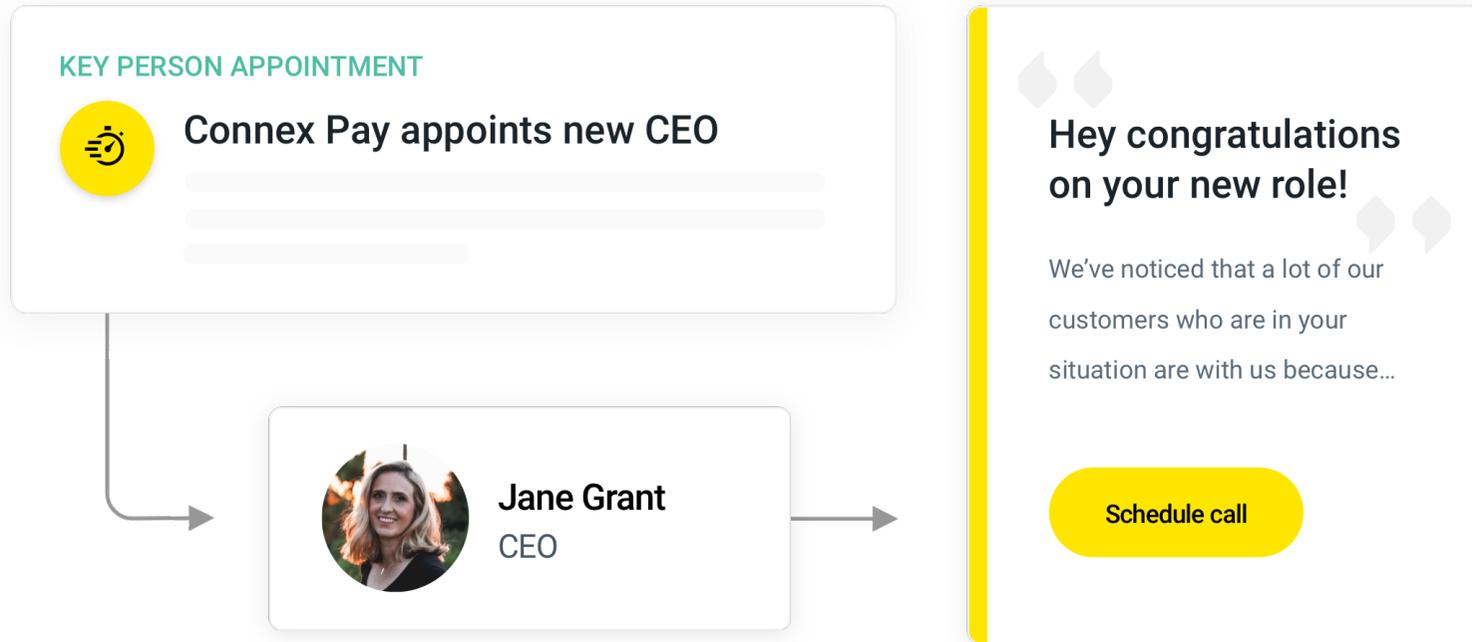
the new customer signing on. This information will ease customer success' job as they'll know the customer's objectives.

5. If the case would be lost before signing, marketing will take over, and it will go right back to nurturing. So eventually, when it's ready, it will come back as a hot lead.

“

If any additional news or changes happen during the sales process, you'll have a new opportunity to reach out.

# CHAPTER 3: GET STARTED



## CHAPTER 3: GET STARTED

### Step 5: Trust the numbers

Because real-time sales is a methodology based on data, it generates additional data you can use to optimize the process further.

To evaluate the results of your real-time sales and marketing efforts, make sure you keep track of all your activities continuously and precisely. Start by choosing the right metrics and key performance indicators (KPIs). These are the most important KPIs of real-time sales:

- Number of new deals started
- Number of booked meetings
- Hit rate on your outreach
- Number of closed deals
- Hit rate to a closed deal
- Average deal size
- Average sales cycle

You can use all and any of these metrics for each of the trigger events you identify. You'll find most of these metrics and information in your CRM.

#### Track deal source

Knowing the source of the deal—which event triggered a positive action, will help you determine the triggers that are performing better. With this knowledge, you can better allocate your time and resources. Also, look at other larger patterns from the gathered data points:

- Which trigger events are leading to large deals?
- Which ones are leading to quick deals?
- Which triggers aren't working at all?

Once you set up a real-time strategy, it won't take a long time to see positive results. However, those result won't be evident until you identify the right triggers for your business. It is likely that you won't

## CHAPTER 3: GET STARTED

identify the right triggers the first time. That's fine. The strategy requires some firm commitment to testing until you identify the correct triggers for your business. Keep testing and tweaking until your results go up (and they will go up).

With the data in hand, you can modify your processes. If some triggers aren't performing as expected, and there will always be some, avoid them! Or, if other triggers generate huge deals, but they take time to close, have your senior salespeople focusing on them.

Finally, a very simple formula will help you measure the success of your real-time strategy. This formula uses the number of triggers acted on, the booked meeting rate, the meeting conversion rate, and the average deal value to calculate the total sales from real-time sales.



**Real-time sales requires some firm commitment to **testing** until you identify the correct triggers for your business**

### Goals and key performance indicators

This simple formula will help you measure the success of your real-time sales strategy:

**Number of Triggers Acted on** (amount of inbound + outbound triggers responded to)

**x Booked Meeting Rate** (percentage of trigger cadences leading to a scheduled meeting)

**x Meeting Conversion Rate** (percentage of scheduled meetings that lead to a sale)

**x Average Deal Value** (average value of all the closed sales)

---

**= Total Sales from Real-Time Sales**

*All of these metrics should be measured for a) the whole unit, b) each trigger separately, and c) each individual.*

# Summary

# Summary

**Real-time sales is part mindset, and part sales strategy. By adopting a data-driven way of doing sales, you'll be able to focus on the accounts that have the highest chance to convert and have the information you need to land at the right moment in the right place. In other words, to be relevant.**

Once you tap into data and sales technology, implementing real-time sales is not hard. Start by creating an ideal customer profile, defining the most relevant buying signals for your proposition, and creating relevant cadences for each trigger. You'll have most of the work done by then.

To make sure real-time sales is a success and your sales outreach becomes truly data-driven, it is essential to determine who in your team will be the real-time champion. This person can open

cases, distribute leads, track progress, and measure effectiveness.

You don't need to move mountains to get started with real-time sales. Pilot this approach by setting up a team or a person responsible for it. This person will take the lead in developing the real-time sales ideal customer profile, the trigger events, and the strategy to track them.

From there on, the person or team can generate content and gameplays/workflows for the different signals and systematically measure, iterate, and improve.

More traditional sales strategies and real-time sales can coexist. But eventually, as more and more businesses see the results from triggers and relevant messaging over mind-numbing cold outreach, a real-time sales mindset will become the new black.



**VAINU**

Vainu is a Sales Intelligence platform that makes salespeople relevant in every step of the sales process by providing them with actionable company data, when and where they need it. Over 2,000 sales teams across Europe and in the U.S. use Vainu's data to sell more in less time—with a better hit rate.

Learn more at [www.vainu.com](http://www.vainu.com).