Framework to Enable Effective Virtual Selling

Sales Research Team
Sales enablement leaders need a clear strategy to support the sales force in a virtual selling environment. Use this framework to review and align virtual selling with new buying realities, including precall sales planning, remote customer interactions and virtual selling enablement.
Introduction

The ongoing pandemic has forced frontline sellers to swiftly adjust their selling activities for the virtual environment. While initially perceived as a short-term adjustment in the sales approach, the uncertain nature of the pandemic as well as the promise of cost savings in the future indicate virtual selling is likely here to stay.

In a June 2020 survey of CSOs, a remarkable 23% of CSOs reported plans to permanently shift field sales to virtual sales roles, and another 36% said they were unsure (see Figure 1). While many CSOs are not yet fully committing to such action, it is clear that in most cases, customers’ responses will truly determine the pace and extent to which selling shifts to a fully virtual environment.

Progressive sales enablement leaders are preparing sales teams for, at the least, far greater virtual sales presence than was expected at the beginning of the pandemic. They realize they must guide sellers to stop assuming live meeting practices transfer 1:1 to virtual settings and prepare them for virtual-first selling behaviors required to succeed today. This preparation includes improved platforms, rightsizing pitches and content, more thoughtful precall planning, increased buyer enablement to support asynchronous customer decision-making, etc.

This research provides a framework to help sales enablement develop a virtual selling strategy in the following key areas:

• **Virtual customer engagement** — This includes tactics for presales call planning and preparation and in-meeting practices for ensuring a productive and engaging dialogue with customers during virtual sales interactions.

• **Virtual seller enablement** — This includes actions for sales enablement in areas such as sales skills, training delivery and onboarding to support sellers in a virtual sales environment and equip them to effectively sell in a remote setting.

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Figure 1. Shifting Views on Sales as a Field-Based Role

We are now considering shifting traditional outside/field sales to virtual sales positions on a permanent basis

<table>
<thead>
<tr>
<th></th>
<th>March</th>
<th>April</th>
<th>May</th>
<th>June</th>
</tr>
</thead>
<tbody>
<tr>
<td>Agree</td>
<td>28%</td>
<td>62%</td>
<td>10%</td>
<td>15%</td>
</tr>
<tr>
<td>Disagree</td>
<td>30%</td>
<td>51%</td>
<td>19%</td>
<td>25%</td>
</tr>
<tr>
<td>N/A or unsure</td>
<td>34%</td>
<td>52%</td>
<td>52%</td>
<td>42%</td>
</tr>
</tbody>
</table>

March n = 29, April n = 100, May n = 27, June n = 24; Note: Data may not add to 100% due to rounding.
Source: Gartner
Planning and preparing for virtual customer engagement

Most sellers recognize the importance of precall planning and take steps to ensure the limited time with customers provides the highest returns. However, the current environment is presenting new challenges, inhibiting customers’ ability to buy virtually and forcing sellers to remotely collaborate with other partners involved in a sales call. Specifically, compared to live meetings, virtual settings require more active coordination between sales call participants and preparation to determine the choreography of calls.

Sales enablement must help sellers make critical changes to these activities to sell successfully in a virtual environment (see Table 1).

Table 1: Framework for Virtual Selling: Precall Planning and Preparation

<table>
<thead>
<tr>
<th>Activity</th>
<th>Current Approach</th>
<th>Optimal Virtual Approach</th>
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</table>
| Sales call discussion with internal partners  | • Briefly and informally identify and discuss the role each seller and other participants, such as specialists and sales leaders, will play prior to the meeting. | • Schedule a call planning session for participants to coordinate their participation in the call, set the objectives and share additional information about the customer.  
  • Role-play select interactions with other meeting participants and conduct a buyer experience audit to anticipate and strategize for likely roadblocks. |
| Customer stakeholder identification and engagement planning | • Plan assuming that stakeholders who previously joined live interactions will or should be the same stakeholders present for virtual interactions. | • Highlight the intent or purpose of the meeting to target appropriate stakeholders and confirm participation by senior stakeholders who may delegate virtual sales calls to junior contacts.  
  • Prepare talking points and plan of action to (a) invite inputs from stakeholders other than primary contact or decision makers, and (b) proactively seek information about and introduction to additional stakeholders who should be involved.  
  • Hypothesize topics, goals and transitions to prepare a conversation path and help the meeting attendees arrive at a shared understanding about the information shared in meetings. |
| Information landscape understanding and planning | • Create a plan to uncover during the meeting any resources and information customers may have already reviewed to learn about their problems and related solutions. | • Prior to the meeting, understand the resources and information customers are likely to review and summarize the key points from this content, with a focus on reconciling contradictory content to make sense of it for the customer.  
  • Hypothesize potential conclusions and questions customers might bring to the meeting. |

Source: Gartner
Delivering engaging virtual customer interactions

Sales enablement leaders must arm sellers to adapt and add to the skills they've honed during live meetings, teaching them to adopt new behaviors while interacting with customers over video and teleconference platforms (see Table 2). This is necessary because compared to live meetings, in a virtual setting:

- Customers are likely to have lower attention spans.
- Customers’ expressions, body language and other cues are harder to observe and track.
- Key decision makers and senior leaders may delegate virtual calls to junior contacts.
- Stakeholders may be more reluctant to share skepticism and challenge viewpoints, especially in a big buying group, making it harder to facilitate consensus.
<table>
<thead>
<tr>
<th>Activity</th>
<th>Current Approach</th>
<th>Optimal Virtual Approach</th>
</tr>
</thead>
<tbody>
<tr>
<td>Agenda clarity</td>
<td>• Apply live meeting tactics of expansive and often flexible agenda.</td>
<td>• Communicate a narrowly scoped agenda with few(her), clearly defined objectives.</td>
</tr>
<tr>
<td>Role clarity</td>
<td>• Create loosely defined roles that rely on in-the-moment “team sport” to help guide the customer dialogue in a productive direction.</td>
<td>• Include a limited number of supplier participants with tightly defined roles and objectives for each seller, manager or specialist to maximize limited time with the customer.</td>
</tr>
<tr>
<td>Use of experts</td>
<td>• Use local experts and occasionally bring in an expert from corporate or another region who has relevant, unique expertise.</td>
<td>• Selectively use remote, high-quality experts and specialists for complex and high-value deals.</td>
</tr>
<tr>
<td>Action items and next steps</td>
<td>• Conclude with an understanding of issues and a scheduled follow-up meeting to discuss actions and next steps.</td>
<td>• Include “leave behind” buyer enablement that can help customer stakeholders socialize ideas and drive action asynchronously.</td>
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<tr>
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<td></td>
<td>• Ensure agreement and clear expectations on next steps; promptly send as a follow-up email.</td>
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<tr>
<td>Level of interactivity</td>
<td>• Use standard, live meeting slides and content that offer limited opportunities for active dialogue or discussion with customers.</td>
<td>• Intentionally use pauses in the meeting to compel customer participation and to check for comprehension and attention.</td>
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<td>• Deploy polling questions to reduce the barrier to participation and uncover potential roadblocks.</td>
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<td>• Encourage customers to co-create ideas and solutions live on the call by using whiteboarding tools that invite collaboration and dialogue.</td>
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<td>Consensus facilitation</td>
<td>• Rely on live meeting tactic of “reading the room” to help pull in skeptical opinions and engage passive stakeholders.</td>
<td>• Drive planned and purposeful involvement of various customer stakeholders’ opinions (beyond the primary point-of-contact).</td>
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<td>• Follow up 1:1 with individual stakeholders to resolve conflicting viewpoints.</td>
<td>• Leverage Mobilizers to help prepare other stakeholders before the meeting and partner with them during the meeting to encourage buying group’s participation.</td>
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<td>• Debrief with Mobilizer to assess stakeholder engagement and create a plan to facilitate consensus.</td>
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<td>Amount of content</td>
<td>• Use live meeting tactics to deliver bulk of information in the virtual sales meeting.</td>
<td>• Thoughtfully create shorter, bite-sized data and content in appropriate formats for 30-, 45- or 60-minute virtual meetings to ensure comprehension and respect time commitments.</td>
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<tr>
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<td>• Use standard “live meeting” data feeds and slides that require significant attention and time to properly explain.</td>
<td>• Prioritize information that is critical to educate customers and provide buying help and requires stakeholder inputs and/or approval to move conversations forward.</td>
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<td>• Use email to follow up with other details.</td>
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<tr>
<td>Cadence of interactions</td>
<td>• Run standard sales process steps with little accommodation of decreased time per interaction.</td>
<td>• Set and communicate expectations about shorter but potentially higher number of meetings.</td>
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<tr>
<td>Debrief with key stakeholder(s)</td>
<td>• Request follow-up time with senior customer stakeholder to connect 1:1 with the sales leader and assess progress.</td>
<td>• Request senior customer stakeholder remain on virtual platform for 5 minutes with the sales leader to discuss progress.</td>
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</table>

Source: Gartner
Enabling sellers virtually

Sales enablement has a critical role to play in not only enabling sellers to prepare, plan and deliver engaging virtual sales interactions but also adapting seller enablement for the virtual environment. This is critical because the majority of the sales force continues to work remotely and as indicated above, a majority of CSOs may plan to make remote selling a long-term strategic play.

Table 3. Framework for Virtual Selling: Virtual Seller Enablement

<table>
<thead>
<tr>
<th>Activity</th>
<th>Current Approach</th>
<th>Optimal Virtual Approach</th>
</tr>
</thead>
<tbody>
<tr>
<td>Training delivery</td>
<td>• Convert existing classroom training curriculum into elearnings.</td>
<td>• Design and deliver training either synchronously (including a live facilitator) or asynchronously (elearning) based on type of content, seller skill maturity level, need for collaboration and in the moment advice.</td>
</tr>
</tbody>
</table>
| Onboarding design and delivery   | • Convert live class curriculum into e-learning without selecting and prioritizing best-fit content for different channels of delivery. | • Prioritize content that delivers the most critical knowledge needed for a fast start, such as prospecting templates, product information, sales process basics, etc.  
• Deliver e-learning based on predetermined onboarding milestones to build foundational knowledge, such as product features/benefits, and basic skills that do not require a live instructor, such as tool training.  
• Host live sessions to help sellers with more complex concepts, keeping class sizes manageable enough to ask questions interactively. |
| Skills taught in training        | • Refresh the frontline on skills already taught in training and rely on managers and sellers to contextualize lessons for the current environment. | • Teach how behaviors within existing skills such as discovery, active listening, social selling, stakeholder management, commercial insight delivery, consensus facilitation and negotiation must adjust for virtual interactions.  
• Teach new or emerging skills, such as sense making, digital dexterity and data literacy that reflect remote selling realities and changes in the buying environment. |
| Sales events and kickoffs         | • Deliver typical face-to-face kickoff content digitally (i.e., 2-3 all-day sessions conducted online). | • Create a common theme to deliver a mix of live-streaming and recorded sessions and activities spread across 1-4 days.  
• Deliver content concisely (i.e., 20-minute presentations if no interaction) in 60- to 90-minute sessions with short, frequent breaks.  
• Reconstruct in-person kickoff experience by creating online communities that allow sellers to discuss relevant topics, post questions, share best practices and showcase customer examples. |
| Sales enablement technology      | • Introduce new digital tools and technologies to help sellers collaborate internally and engage with customers virtually. | • Carefully assess existing technologies and digital tools to understand additional functionalities they are able to offer before introducing new tools or technology.  
• Selectively retire technologies that may be redundant and/or are no longer used.  
• Communicate and train managers and sellers on how best to use existing technologies, such as Google Suite, Webex and messengers, to collaborate and share content, both internally and with customers.  
• Deploy AI-based conversational analytics and guided selling capabilities to help manage full pipeline, from lead development to helping sellers capture buying signals and sentiment that are lost using traditional selling methods. |

Source: Gartner

Table 3 highlights how sales enablement leaders can optimize their approach to virtual seller enablement in areas such as sales training, onboarding, events and enablement technology.
Next steps and way forward

For successful virtual selling today, sales enablement leaders must adjust their existing investments and reallocate resources among people, processes and technology. Furthermore, a more permanent shift to virtual selling will compel sales organizations to adjust sales strategy, internal organizational design, go-to-market strategies and key performance metrics. Sales enablement leaders must stay aligned with these changes and prepare their teams to adopt new ways of enabling frontline sellers and buyers.
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Sense Making: The High-Performing Sales Approach for the Information Era
Sales Enablement on a Shoestring Budget: Maximizing Impact During Economic Uncertainty
Top CRM Sales Technologies for the New Realities of Selling in the COVID-19 World
Adjust to the Reality of Virtual Selling

The Sense-Making Approach to Leveraging Sales Specialists
How to Streamline Deal Approval While Protecting Margins
Scalable Subject Matter Expertise (Airgas)
Sense Making Enablement Toolkit: Curating and Connecting Customers to Relevant Resources (Module 3)

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