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Customer Engagements Accelerator

Wendy Hower
Senior Customer Success Manager

Session Abstract

Learn how to use this **purpose-built solution** to quickly and effectively tackle your sales organization's most strategic deals.

Target audience: Sales professionals looking for a competitive advantage in closing B2B deals!

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Welcome!

Wendy Hower

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As a Smartsheet CSM, I:

- **Partner** with customers to achieve their goals in Smartsheet
- **Empower** customers with knowledge and resources
- **Advise** customers on options to create Smartsheet solutions
- **Connect** customers with Consulting, Training, and Support as needed

Learning objectives

- Identify typical deal management challenges
- Understand CE Accelerator approach
- Understand CE Accelerator components
- Experience CE Accelerator workflow and value

1. Identify Typical Sales Process Challenges

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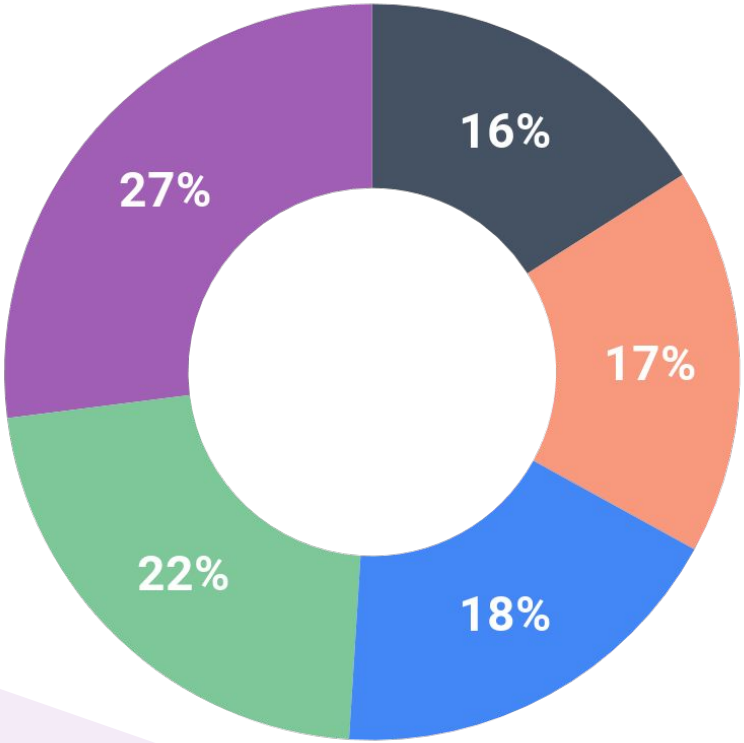
Challenge #1: It takes a village to close a deal

11.1

People involved in closing a deal[1]

1. CEB Sales Complexity Assessment. 6.8 Customer stakeholders and 4.3 vendor co-workers.

Challenge #2: B2B sellers get 17% of buyers' time



- Other
- Meeting with Potential Suppliers
- Researching Independently Offline
- Meeting with Buying Group
- Researching Independently Online

Customer:

"Show me the product… and I'll connect the dots."

1. CEB 2017 Digital B2B Buyer Survey.

Challenge #3: Stop… drop… and report!

Sales manager to sales rep:

“What happened in last month’s forecast?”

Change the conversation: joint engagement plan

Joint engagement plan

Purpose: successful customer

Understand Challenge

Demonstrate Fit

Business Case

Define Consulting's Role

Get Leadership Buy-in

Agreement

Successful Launch

Successful Solution

Close plan

Purpose: predictable revenue

2. Understand CE Accelerator Approach

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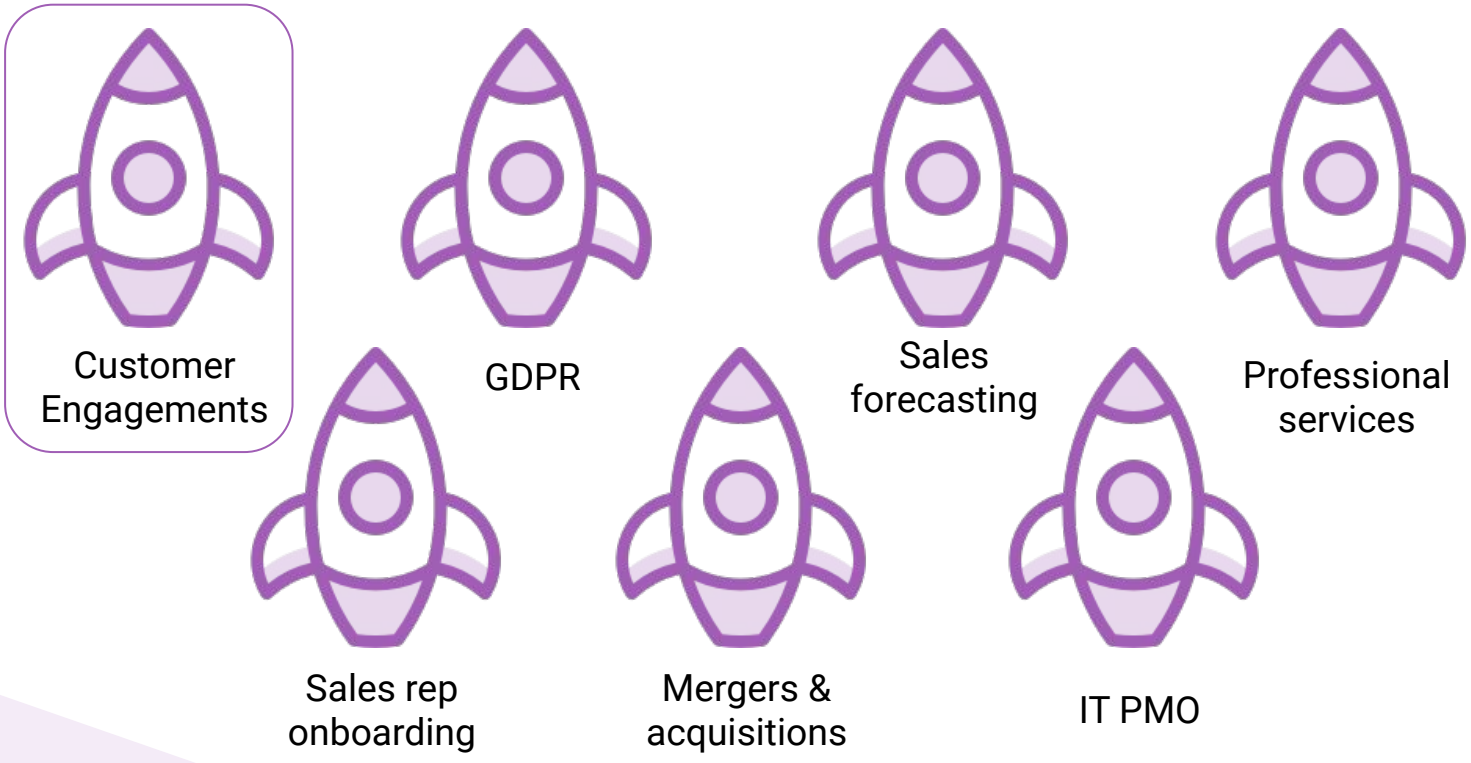
Accelerators are purpose-built solutions



https://www.smartsheet.com/marketplace/accelerators

Engaging customers to close deals

Who *doesn't* want to close deals faster???

Engage customer and gain Exec Approval

Initiate Customer Engagement Plan

Report on Customer Engagements Portfolio

Update engagement plans and reports

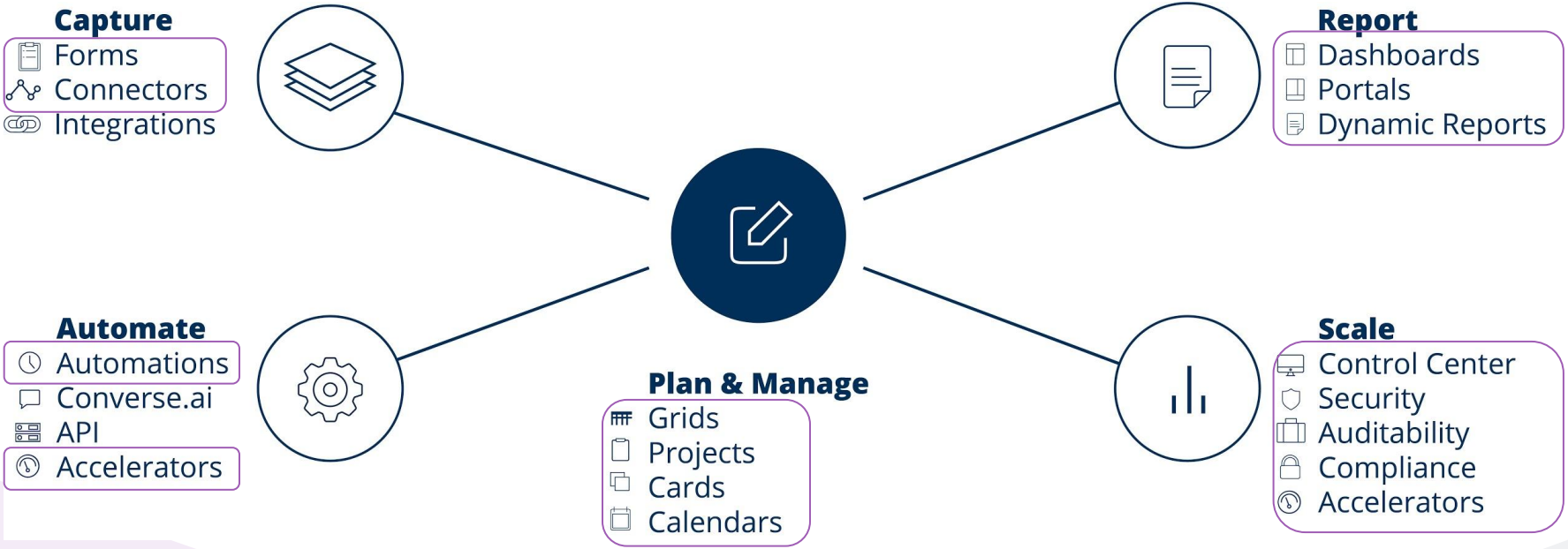
Close deal and archive

Customer engagements control at scale

Real-time visibility | Adoption of best practices | Automated portfolio reporting | Manage change at scale

Accelerators package Smartsheet capabilities

Accelerators package Smartsheet capabilities in a solution that solves a business problem, so you can achieve your outcomes faster with less effort at scale.



3. Understand CE Accelerator Components

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CE Accelerator components + workflow

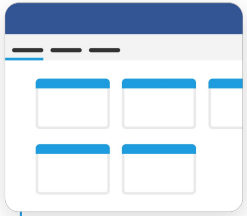
CRM Connectors

Information is brought into the solution automatically based on triggers set up in the Smartsheet CRM Connectors for Salesforce, Microsoft Dynamics or the API.

Collect opportunities in a sheet

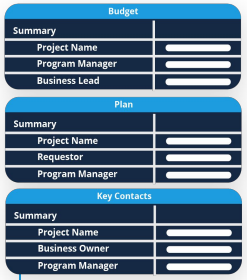
Each customer opportunity lives on a row in the Intake sheet. This serves as a tracking sheet for which are brought in and which are active and initiated. There is no need to update information directly on this sheet.

Select opportunity for engagement plan



Customer Engagements are approved for Sales to self-serve with Control Center. Sales Management retains admin rights and visibility automatically.

Populate engagement plan

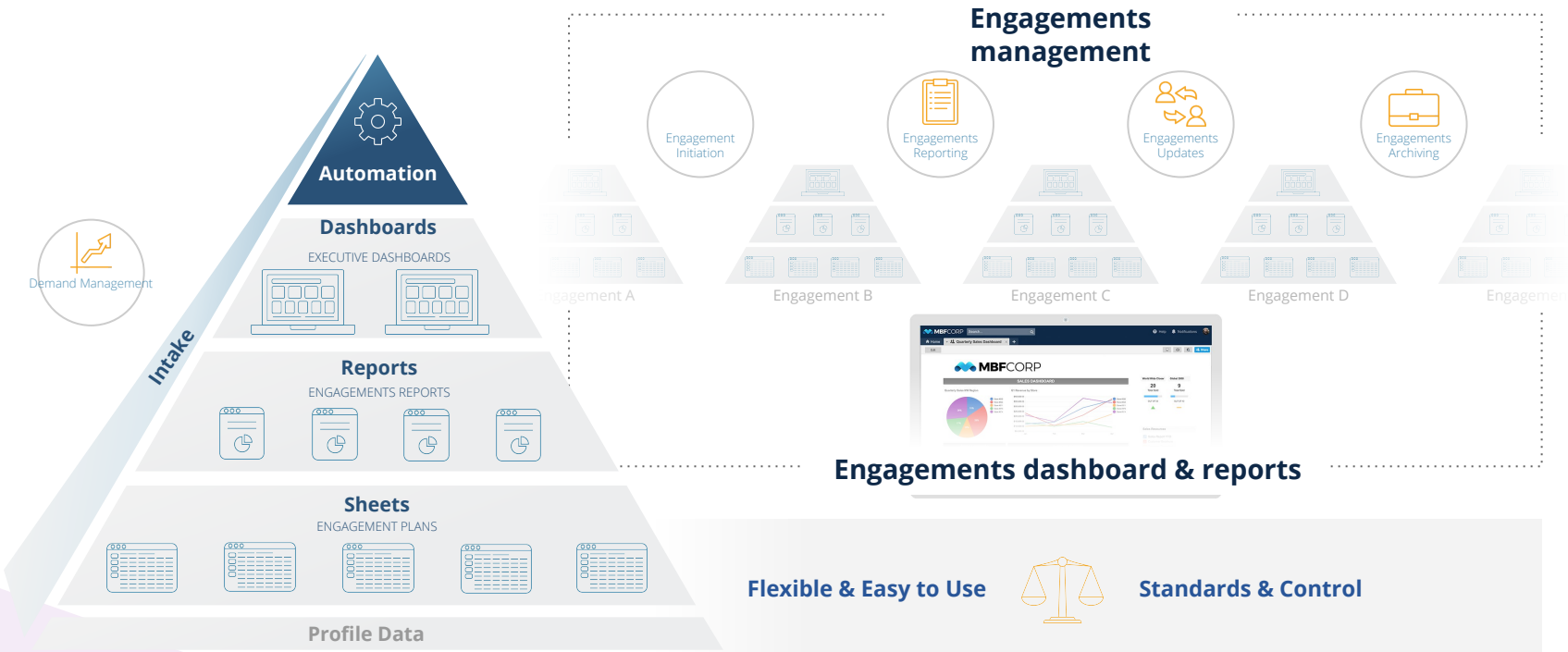


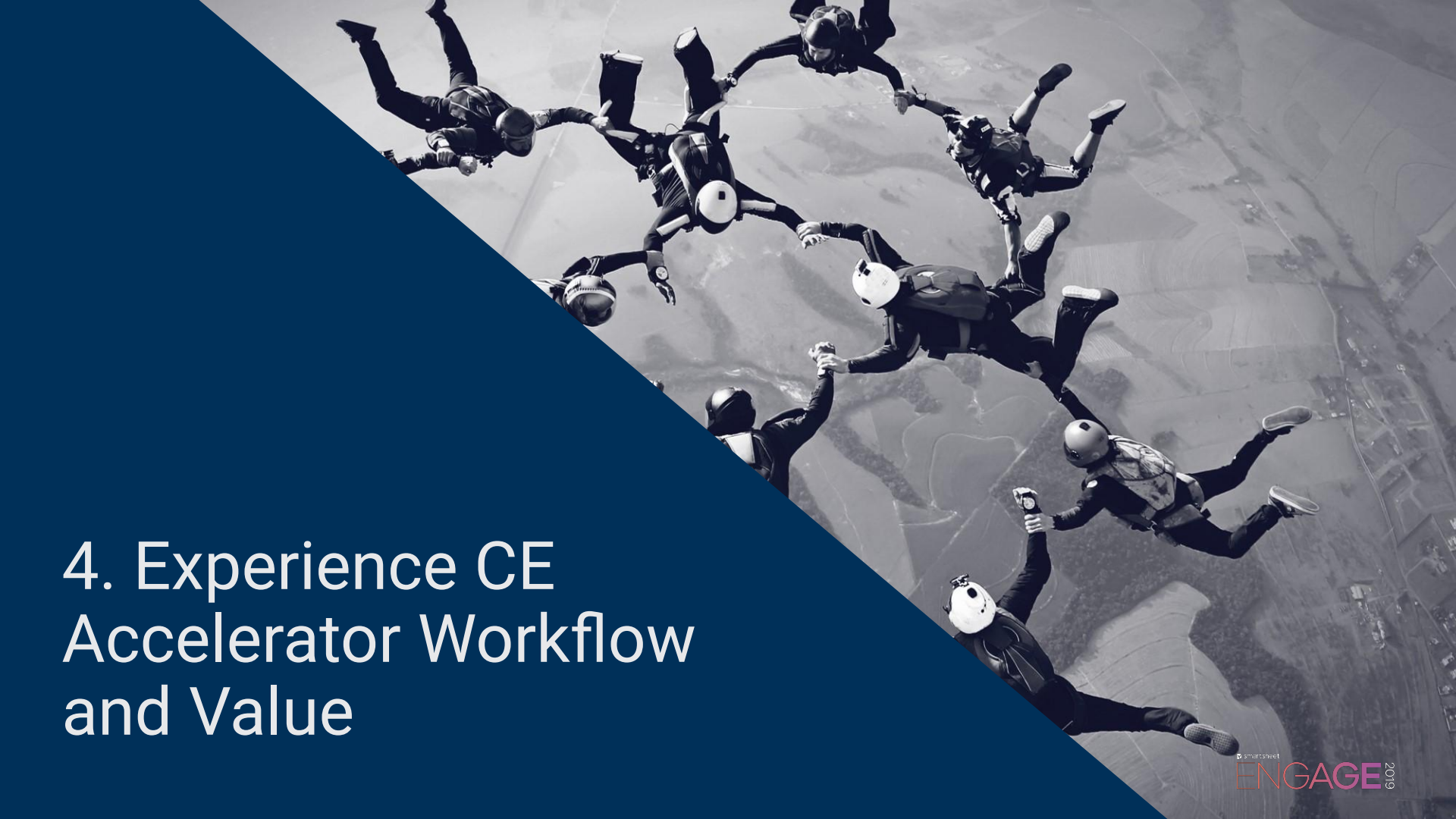
Control Center is configured to bring all of the information from the Intake sheet and populate the fields for the Customer Engagement project automatically.

Update to CRM

Information gathered in Smartsheet is brought into your CRM, and as items change like ARR or Close Date, those are synced to the Engagement Workspace automatically to track changes over time.

Customer engagements at scale





4. Experience CE Accelerator Workflow and Value

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Demo time!

- Sales rep: initiate engagement plan with the customer
- Customer: update tasks in the engagement plan
- Executive: review pipeline
- Sales operations: apply a global update

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What's next?

- Please fill out the survey
- Check out Accelerator demos in the Innovation Expo
- Learn more on smartsheet.com
- Talk to your account team

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