GUIDE TO DATA ACCURACY

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HOW ACCURATE SALES ACTIVITY CAPTURE CAN BOOST SALES PRODUCTIVITY BY 30%.

If you're not using some sort of analytics platform to optimize your go-to-market team's performance, you're probably falling behind your peers. Sales, marketing, and customer success teams must constantly measure and improve their strategies to remain competitive. The most commonly examined of these metrics are categorized as sales analytics.

In a McKinsey study of over 1,000 sales organizations, they found that 53% of the top-performing teams called themselves "effective users of analytics," while only 37% of the average and underperforming teams feel they used analytics effectively.

With an automated sales activity logging tool, you can instantly increase productivity by 30%. Relieve your reps from the laborious, error-prone, and time-consuming activity of logging their own activities, and enjoy greater productivity, more deals, and more accurate data.

WHY IS SALES ACTIVITY INFORMATION SO IMPORTANT IN THE DIGITAL AGE OF REMOTE SELLING?
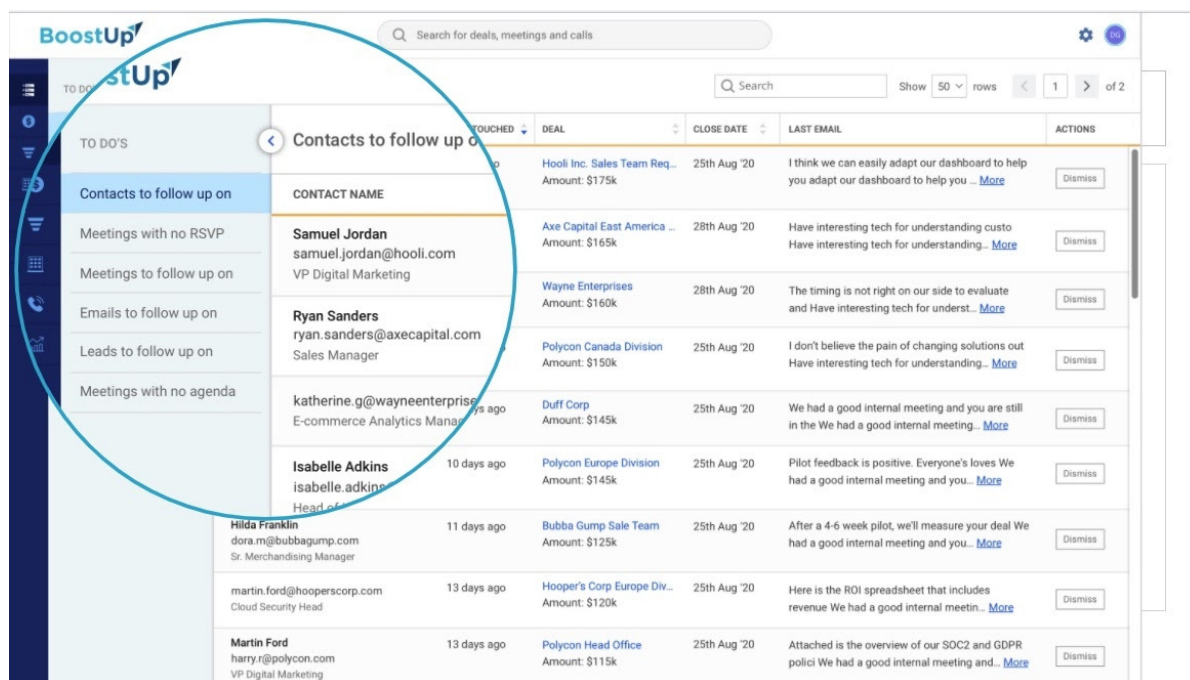
In our new digital age of remote selling, sales teams are faced with an unprecedented issue. How do you manage, coach, train, and optimize for sales performance over a geographically distributed and disconnected workforce?

The answer is sales activity data collection and analysis. Teams must capture a complete record of every sales activity, who was involved, what happened within it, and the result. This data can then be analyzed to improve a sales team's revenue attainment and meet goals.

Since reps, managers, and leaders can no longer interact face to face, sales floors cannot be walked, and impromptu meetings no longer exist, the sharing of sales activity information and its impacts must be formalized. Teams need to understand exactly what sales reps are doing so they can make the necessary adjustments to increase lead generation, win rates, and customer retention while optimizing resources and creating efficient and effective plans.

53% of top-performing teams are "effective users of analytics"

WHERE IS SALES ACTIVITY DATA AND WHY IS IT HARD TO CAPTURE IT COMPLETELY?

The location of sales activity is one of the reasons why it is so difficult to capture it completely and accurately. Nearly every sales team has established their CRM (namely Salesforce) as their single source of truth. Then, periphery sales tools like email, dialers, social messages, and chat are integrated into the CRM.

The problem is that these tools all have different strengths of integration, meaning they may not provide complete and accurate data to the CRM. If this is the case, many teams rely on the sales reps themselves to record the information. Most often, and contrary to what their leaders may think, reps don't feel it is their job to collect sales data as they sell. Therefore the generation of accurate sales information is often a second thought.

84% of CEOs are concerned about the quality of the data they are basing their decisions on.

So, sales activities occur outside of the CRM, but their data is captured within it. Most sales analytics platforms also exist outside of the CRM and pull the necessary sales activity data from it, making the CRM the middleman between where sales activities are actually taking place and the platforms that analyze it. If incomplete, inaccurate, or improper data is in the CRM, that means that analytics based on them are also inaccurate.

The problem is so pressing that Forbes reports that 84% of CEOs are concerned about the quality of the data they are basing their decisions on. That means that over 80% of the above lead generation, sales optimization, customer retention, and planning metrics could be wrong in any given organization.

WHAT ARE THE LIMITATIONS OF EXISTING TOOLS THAT PROMISE ACCURATE ACTIVITY CAPTURE?

Many tools simply cannot live up to the promise of accurate sales activity capture. The issue lies in the method of activity capture, as well as the true depth of data collection that they are capable of.

In the case of a CRM inbox, the truth is that activity capture is far more manual. Tools like this will prompt reps to enter information or require that they forward emails rather than truly automating the process. This results in incomplete and/or inaccurate data as reps will only enter the most basic or necessary information, if at all.

Tools like this also require a "map" from sales reps, meaning that they first must create the contact in the CRM before the inbox knows to record information from them. Furthermore, activity is not associated at an opportunity level, leaving managers with no way to understand how sales engagements have influenced a deal.

This manual requirement and misconstrued data associates only create more work for reps while resulting in unreliable data. At the end of the data, sales reps only want to do one thing: sell. Salesforce found that 69% of the top-performing sales organizations automate repetitive tasks like logging sales data and customer notes. To truly power and enable sales reps, teams must automate repetitive tasks like data collection so reps can spend more time selling and managers can gain more accurate data.

69% of the top-performing sales organizations automate repetitive tasks.

SALES ACTIVITY CAPTURE TOOLS

	Manual Data Entry	SFDC Inbox & Other Tools	BoostUp.ai
Sales Activity Capture Method	Reps manually log contacts, and activities directly in CRM.	Prompts reps to manually add contacts from their inbox. Does not automatically add contacts. Activities are only recorded from manually added contacts. Result is incomplete data.	Data capture is completely automated. Works in background with no reliance on rep inputted data.
Results	Limited Data • Reps don't add activity information • Wastes sales rep time • Reps push selective information • Takes time away from selling	Limited Data • Relies on rep inputs • Results in incomplete data capture • Activities only logged to pre-existing contacts • Incomplete activity capture • Causes mist-trust of data • Activities not captured accurately at the opportunity level	Complete and Accurate Data • Accurately captures ALL contacts and activities • Accurately links to right opportunity • High level of data trust • Out of the box analytics on "lack of activity" • Real-time audit of rep's activity performance

HOW DOES BOOSTUP AUTOMATE ACCURATE ACTIVITY CAPTURE?

BoostUp integrates directly with the source of the activity, for example, email or the calendar, and reconciles that with the CRM. It captures activity against and associated with accounts, meaning that the conversations, calls, emails, meetings that drive deals forward are associated with the deal itself and not just the contacts involved.

BoostUp's activity capture is also 100% automated, it searches inboxes and meeting records for activities that have occurred in the past and automatically adds new ones as they occur to gain complete and accurate data.

HOW CAN YOU USE CAPTURE ACTIVITY DATA TO AUDIT REP'S PERFORMANCE?

Successful B2B sales require rapport and relationship building. The only way to accomplish this is though consistent, valuable, and engaging communication on behalf of the rep. With accurate and reliable activity data capture, sales teams can monitor rep performance.

In today's world of remote sales this is especially important to ensure that sales reps are working accounts, holding meetings, and making every effort possible to close a deal. Since reps are removed from the collection of their own data, managers can ensure that everyone is evaluated on an even playing field.

If deals are slipping or falling through, managers can examine the activities performed against accounts to ensure that the right activities are being conducted to move the deal forward. This is not solely a disciplinary tactic either, as activity audits are incredibly useful for sales coaching sessions and overall performance improvement. It can also be used to identify trends across the entire team.

WHAT KPIS ARE THE BEST LEADING INDICATORS OF REP ACTIVITY, ENGAGEMENT AND QUALITY?

Outside of more typical measurements of sales activity like calls made, emails sent, or meetings held, are the metrics that measure the quality of those activities.

Sales teams should look at metrics that track engagement quality. This includes reciprocity of actions and recency of engagements. When a rep sends an email, who replies and how quickly? Does engagement increase as the deal progresses? If not, there may be an issue.

You should also monitor the seniority of engaged contacts. Are you communicating with your ICP? Do the meetings held get more advanced as the deal stage goes on, or are they still surface level?

In addition to rec priority metrics, teams should also monitor:

Pipeline Metrics
- # of new opps created
- # of opps progressed
- # of opportunities touched
- # of Opps not touched in last 7 days

Meeting Creation and Follow up
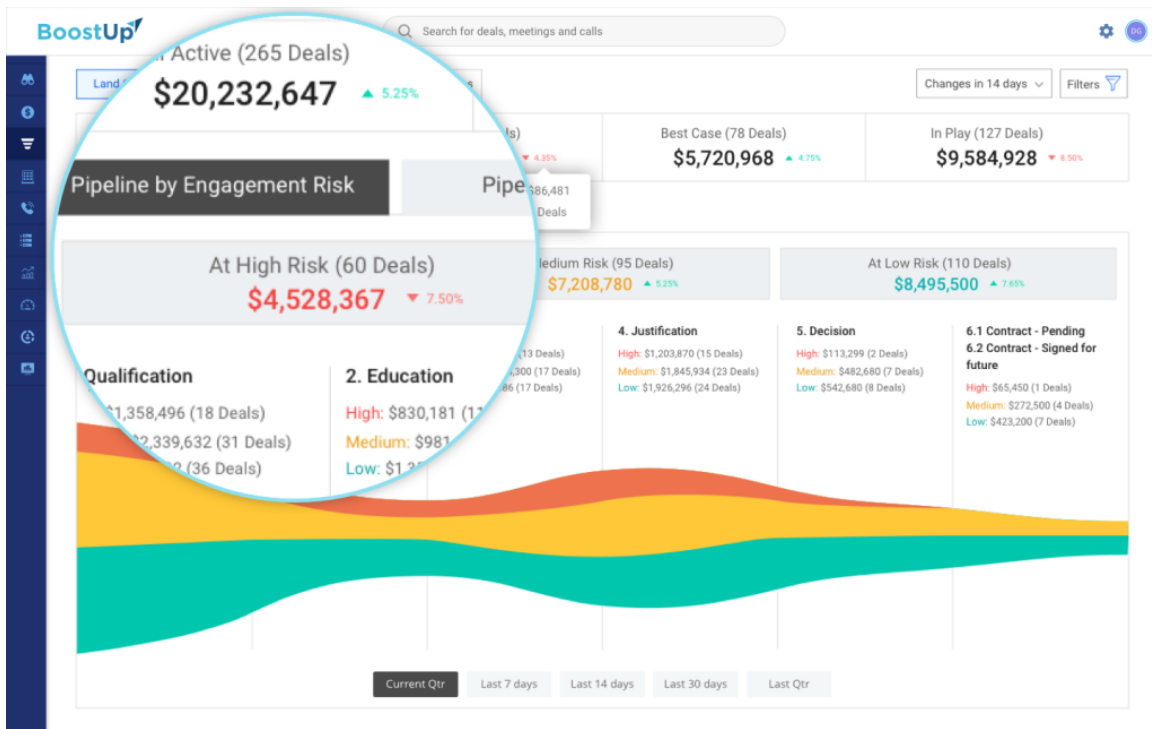- # of 1st MeetingsDelayed meeting follow up (> 7 days)
- Delayed prospect email response (> 7 days)
- # of emails sent
- # of emails received

Deal Execution
- Avg. # of touches per opportunity
- Avg. # of contacts touched per opportunity
- Avg. # of contacts engaged per opportunity
- Avg. # of meetings per opportunity

WHAT RESULTS CAN YOU EXPECT WITH ACTIVITY INTELLIGENCE?

Activity intelligence creates more accurate data for better sales performance.

Teams using BoostUp have improved their forecast accuracy by 25% and save over 20 hours a month through automated analysis.

HOW DOES BOOSTUP MAKE IT SEAMLESS TO CAPTURE, AUTOMATE, ANALYZE AND AUDIT REP ACTIVITY PERFORMANCE?

BoostUp.ai is the only out of the box end to end platform that drives data accuracy and the analytics necessary to extract true performance. Its integrated sales intelligence solution brings call, contact, email, calendar, chat, business intelligence, and forecasting data into a single platform for maximum results.

Rather than relying on data collected by other tools, or reps, BoostUp automatically collects all sales data with the context that it occurred in. It analyzes these activities with AI for deal insights based on the context and sentiment of all engagement. This enables it to spot a lack of engagement to create signals for managers to coach more effectively and improve forecasting.

Data accuracy is one of the core issues that organizations face today, and it absolutely must be remedied. At the same time, there are a plethora of tools, platforms, and solutions on the market but they are not all created equal.

It is imperative that teams choose the right platforms that not only enable truly accurate and real-time data collection, but also analyze it in the proper way. This is the only way to guarantee that the proper business decisions are being made about revenue generation and resource utilization.

BoostUp.ai believes the revenue process is the most important business process for any B2B organization. That's why we've built the first complete, accurate, and actionable revenue intelligence on the market.

BoostUp helps companies improve efficiency, predictability, and growth across the entire sales process to achieve revenue excellence. BoostUp provides revenue teams complete visibility and transparency into their business and sales process, drives process excellence, and identifies risk and opportunity in the pipeline while improving forecasting rigor and accuracy. This drives team efficiency, leads to a high-performing sales team, and boosts sales execution and revenue.