Modernize Your Sales Ops Data Strategy

cdata

Digital-first experiences have irreversibly changed customer expectations

The pandemic era has led consumers to almost entirely move their buying process online. In fact, **Gartner predicts that 80% of B2B sales will go fully digital by 2025**. Customers now crave highly personalized, high-touch interactions with your company before they even speak with a seller. To connect with customers and close deals, sellers must learn as much as possible about their customers' online "footprint" with your company and leverage that knowledge to solve their needs and wants.

The sheer volume of customer data generated across departments today is staggering. Your Sales Operations team faces a clear opportunity to leverage that data to extract customer insights, create personalized buying experiences, and close deals. But fighting data sprawl and breaking through interdepartmental data silos often feels like an uphill battle.

Data connectivity solutions provide Sales Ops with the tools they need to build smarter, faster, customer-centric sales processes.
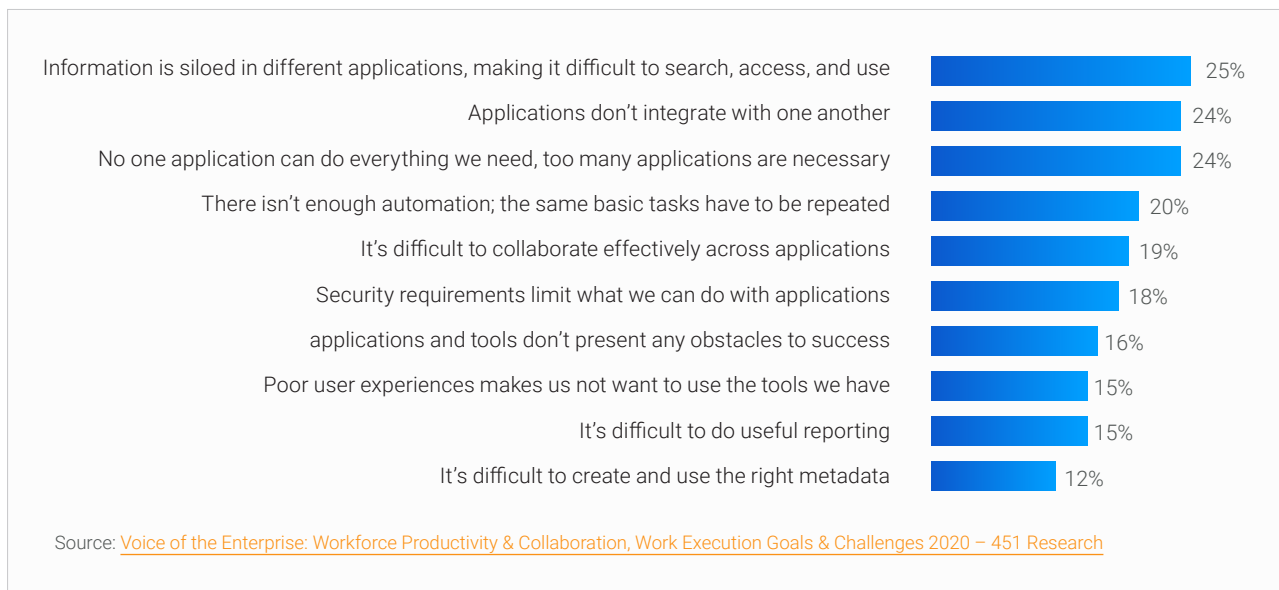
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From Legacy to Digital Sales Touchpoints

Organizations continuously adopt new digital platforms and SaaS applications to help their teams deliver personal, relevant, timely interactions for self-learning customers. As a result, tons of data is generated and waiting to supply sales teams with a transparent 360-view of their customers. But getting to that data and making use of it remains a challenge.

A recent 451 Research report revealed common obstacles when making use of digital business operations data:

Information is siloed in different applications, making it difficult to search, access, and use	25%
Applications don't integrate with one another	24%
No one application can do everything we need, too many applications are necessary	24%
There isn't enough automation; the same basic tasks have to be repeated	20%
It's difficult to collaborate effectively across applications	19%
Security requirements limit what we can do with applications	18%
applications and tools don't present any obstacles to success	16%
Poor user experiences makes us not want to use the tools we have	15%
It's difficult to do useful reporting	15%
It's difficult to create and use the right metadata	12%

Source: Voice of the Enterprise: Workforce Productivity & Collaboration, Work Execution Goals & Challenges 2020 – 451 Research

Lines of business are generating more customer data than ever across dozens to hundreds of data sources. From CRMs, ERPs and marketing automation tools to ecommerce platforms and accounting software, these data sources contain the necessary information to help Sales Ops refine and personalize the modern sales process — they just need to work together to generate holistic insights into the customer journey.
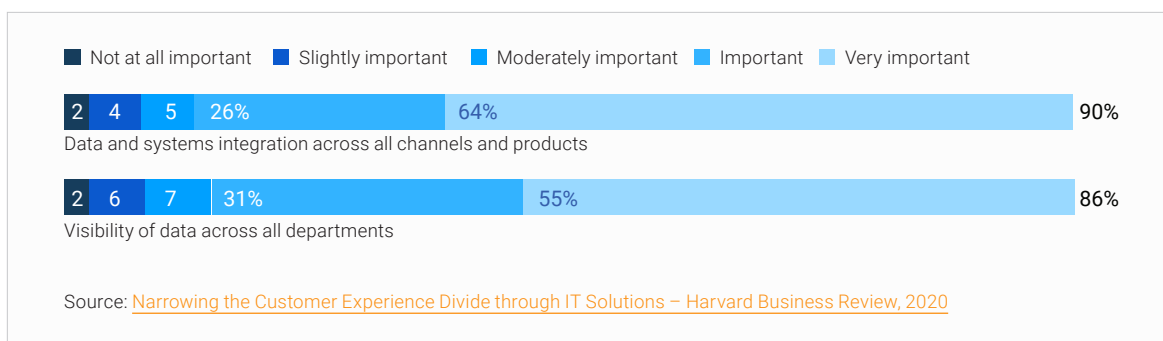
In today's data-driven world, it can feel impossible to derive value from mass amounts of customer data siloed across different departments. Your Sales Ops team needs a modern data connectivity solution that brings organizational data together to break through the maze of information.

Complete Your 360 View of Customers

To extract real insights into your customers and prospects, all departments across the organization must align their systems to gain a holistic, or 360-degree, view of every interaction – from website inquiry to product purchase and renewal opportunity.

Data integration is vital to achieving a true Customer 360 view and optimizing the sales process. In fact, according to a Harvard Business Review survey, 90% of respondents believe that integration is important to very important to their customer experience strategy.

How important are the following factors in delivering a personalized and seamless customer experience?

■ Not at all important ■ Slightly important ■ Moderately important ■ Important ■ Very important

| 2 | 4 | 5 | 26% | 64% | 90% |

Data and systems integration across all channels and products

| 2 | 6 | 7 | 31% | 55% | 86% |

Visibility of data across all departments

Source: Narrowing the Customer Experience Divide through IT Solutions – Harvard Business Review, 2020

With a modern data integration strategy, Sales Ops can fully understand:

• The business challenges your prospects face
• Effective strategies to communicate with and generate leads
• How to meet customers where they are in their buying journey

By connecting data islands, Sales Ops can enable cross-functional information sharing, democratize data access, and arm your sales team with a 360-degree view of your customers to close more deals and support customers' needs.

Salesforce and QuickBooks Online – Better Together

Suppose your Sales Ops team needs to unite customer data between Salesforce and QuickBooks Online to give your sales team transparency around the customer lifecycle. CData Sync allows you to create continuous, incremental replication jobs for Salesforce and QuickBooks Online data and store it in the database or data warehouse of your choice. This consolidated snapshot of interdepartmental data enables your Sales Ops team to analyze customer information from multiple angles and make informed decisions when engaging with users.

Using other platforms? No problem. CData offers connections to over 250 data sources, including major sales, marketing, and accounting software platforms like HubSpot, NetSuite, FreshBooks, and more.

Drive Sales Forecasting with Complete, Reliable Data

As data expands across the organization, Sales Ops teams find it increasingly difficult to wade through interdepartmental data to glean insights. For example, sales forecasts are a crucial part of a modern sales function, but misaligned department data can leave these reports woefully inaccurate.

Upland Software recently reported that most salespeople lose 2.5 hours each week to sales forecasting, which are **less than 75% accurate.** As many as 33% of Sales Ops professionals aren't even prioritizing data in their decision-making, according to LinkedIn. Accurate goals can only stem from accurate metrics — which require all your sales, marketing, accounting, and financial data to align within your reporting tools.

75%

It's time to graduate from manually gathering data and building reports based on half-baked information. Sales Ops needs to quickly make data-driven decisions based on fully accurate, comprehensive sales forecasting reports. With data connectivity solutions, you can simply create connections between data sources and allow organizational data to flow automatically into the reporting tool of your choice. No more manual data entry, time wasted, or inaccurate reporting.

Rethink Sales Reporting

Say you want to build out a data-driven sales forecast report in Power BI using Salesforce data. CData Power BI Connectors are tailor-made for Power BI, providing real-time connectivity to virtually any data source from within Power BI, including Salesforce. Simply configure the connection and begin working with live Salesforce data in your existing Power BI reports. This helps generate reliable, up-to-date sales forecasts without the manual work and headache.

Not using Power BI? CData offers hundreds of connections to analytics tools, including Excel, Google Data Studio, and Tableau.

Sales and Marketing, Aligned

Information silos that obscure reliable sales processes also fracture teamwork across departments. Lack of alignment between departments – especially sales and marketing – can severely stunt corporate performance. Inconsistency leaves prospects less than impressed as sales pipelines clog with unanswered, uninterested, or unsuitable leads — inevitably leaking big revenue opportunities.

Conversely, when sales and marketing integrate and work together, organizations benefit from quality leads, shorter sales cycles, and lower operational costs. Consistent information across sales and marketing workflows keeps leads flowing and revenue coming in.

Sales Ops can lead the way to sales and marketing alignment through data connectivity. Connecting cross-functional applications and tools allow sales and marketing to collect data once and instantly share customer knowledge between departments.

As prospects make first touch with marketing materials, any customer info collected can be pulled into the CRM, ERP, and analytics platform of your choice, giving your sales team a leg up when it comes time to make the sale. As a result, sales leads are quickly captured, scored, followed up on, and converted. Marketing learns from successful deals where to refine their target audience, what campaigns resonate with prospects, and when to double down on messaging and advertising channels that work.

Meet Today's Needs, Adapt to Tomorrow's Opportunities

As sales and marketing teams digitally transform and refine their processes, they often adopt multiple tools to enhance performance – but these tools don't all play nice with each other. Rather than having to ditch your current software systems in favor of an expensive one-size-fits-all solution, CData allows you to connect the systems you're already using to streamline sales and marketing processes.

CData Connect Cloud is a no-code data hub that enables users to connect and work with data from all your cloud applications, systems, and databases – all from within one cloud-based interface. Now, you can scale your sales and marketing operations without worrying about supporting multiple integration points.
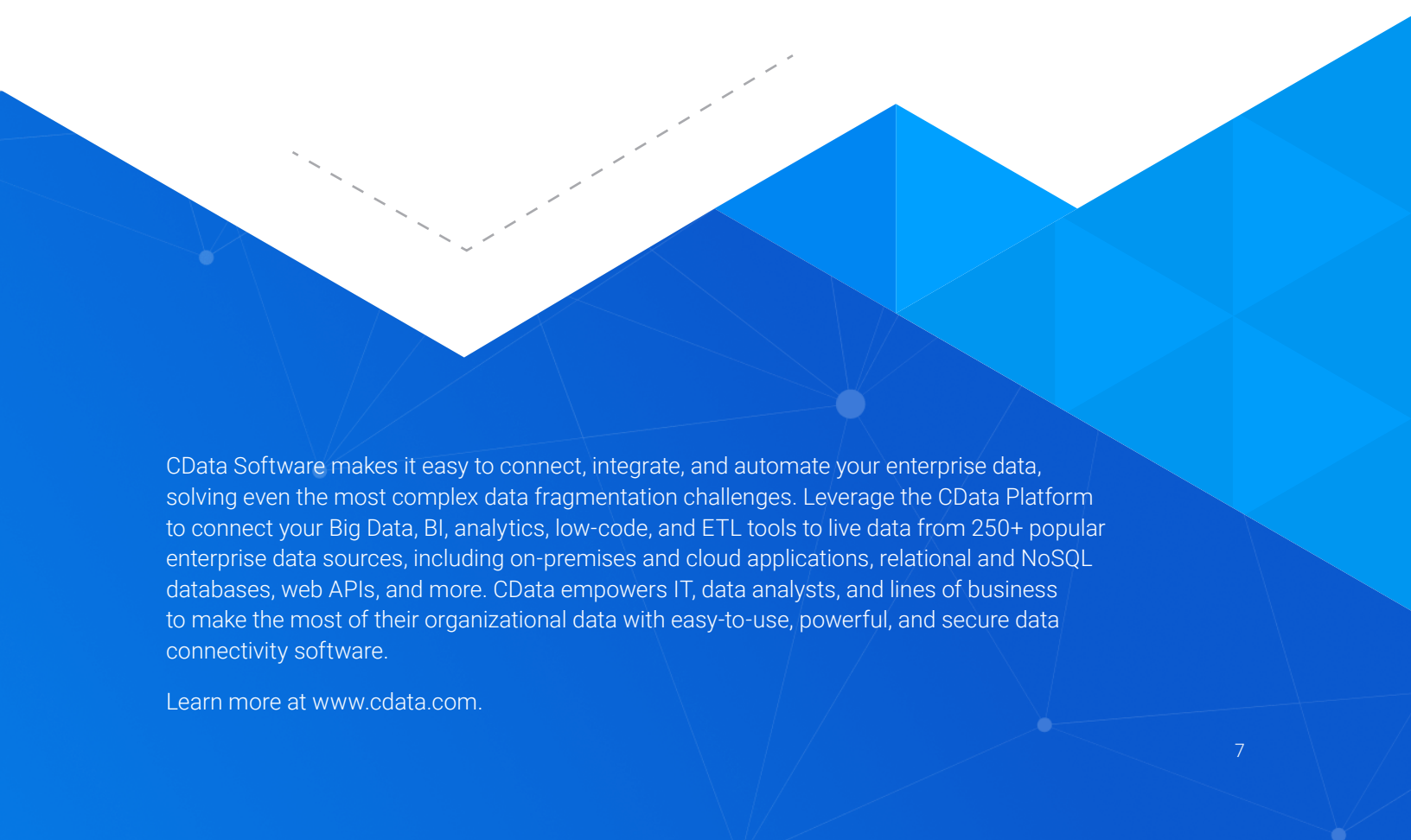
Is Your Team Ready for the Future of Sales?

Leveraging data the right way, Sales Ops can evolve how your organization does business. Free your teams from manual, low-value tasks and start focusing on more accurate, streamlined, reliable customer-centric sales cycles.

CData Software offers data connectivity solutions to help Sales Ops teams drive digital transformation and meet modern customer demands. CData makes it easy to connect, integrate, and automate data, providing access to live data from 250+ popular enterprise data sources, including on-premises and SaaS applications, databases and warehouses, APIs, and more.

Ready to transform your Sales Ops data strategy?

Learn more or get in touch with a CData integration specialist today.

CData Software makes it easy to connect, integrate, and automate your enterprise data, solving even the most complex data fragmentation challenges. Leverage the CData Platform to connect your Big Data, BI, analytics, low-code, and ETL tools to live data from 250+ popular enterprise data sources, including on-premises and cloud applications, relational and NoSQL databases, web APIs, and more. CData empowers IT, data analysts, and lines of business to make the most of their organizational data with easy-to-use, powerful, and secure data connectivity software.

Learn more at www.cdata.com.