freshworks

Win more deals with a Customer 360 view

Table of Contents

Introduction

So, you have a bucket load of leads the marketing team sends you. Your job now is to convert them. Except, that's easier said than done since you sell to prospects you know nothing about.

Trying to move a lead you have no background on can be a bit like going into a basketball game blindfolded. You're less likely to make the shot (or, in this case, convert leads) as you'll mostly work based on guesses.

The solution?

A Customer 360 view gives you a holistic view of all the lead data that both the marketing and sales teams gather.

This means you'll have your hands on all the information you need to nurture leads. This includes the lead's origin (social, website, or a marketing campaign), how they have been interacting with the marketing team, and the content they have been consuming.

The best part: having all this information accessible means you can close more deals. Hard to believe?

Here are three easy ways a Customer 360 view can help you win more deals fast.

01 | Engage sales-ready leads

If you find yourself neck-deep in leads that don't convert, you're not alone. Over 40% of sales reps say prospecting is the toughest part of the sales process.

On top of that, engaging leads only to find out later that they weren't ready to buy from you can lead to a lot of frustration and waste of time. Luckily, the solutions below can help make prospecting effective for you.

Thankfully, a predictive scoring model can help you target the right leads and speed up the selling process. Essentially, a predictive scoring model gives leads a score that determines how likely they are to convert.

Predictive scoring helps you identify the most sales-ready prospects that assign a score ranging from low to high. This score is based on the contact's engagement level with the sales representative.

Instead of taking a chance on every lead that comes through, focus on leads that have a high predictive score. In fact, leads with a high predictive score are likely to convert as compared to those with a low score. The result? You can dedicate time only to leads that are sales-ready. This gives you space to prospect better, sell more, and chase leads less.

Secondly, the predictive scoring model can help guide your actions too. Let's say, you are working on personalizing follow-up emails. Sure, personalized emails bear sweet fruit, so you're taking the right course. However, not all leads are created equal, which means it isn't viable to personalize emails to all your leads individually.

With a predictive score assigned to each lead, you can invest time into personalizing emails only to the prospects that are likely to convert. Again, this saves you time.

This score is concluded based on the following factors:

Leads' behavior on your site, email, and in-app - This shows how interested they are to buy from you

Leads' descriptive behavior and how well they match your ideal customer profile – This includes where a lead is from and what they do to understand how well fit they are with your target audience

Your historical contact score – This tells you how closely the new lead matches similar leads that you've closed in the past

Ultimately, the score that you get helps in two ways. Firstly, you end up targeting only sales-ready leads.

Reduce response time with an AI chatbot

Customers expect immediate responses. That's a given. In fact, 30-50% of the sales go to businesses that respond first.

But with everything from prospecting to selling on your plate, there just doesn't seem to be enough time to get back to your prospects' queries quickly, right?

A simple solution: use an AI-powered chatbot to answer common questions that leads typically ask. In doing so, you can continue on with other tasks while the lead gets their problem resolution right away.

If there's something that requires your intervention, the bot can route the query to you. And here's the best part: you can pre-program the chatbot to route queries to territory-specific reps.

Suppose you handle leads in region A. Your teammate, on the other hand, takes care of leads from region B. The bot can then send all queries from leads from region A your way and region B leads' queries to your colleague.

See what's happening here? You save more time as you don't have to internally reroute queries. What's more, each lead doesn't only get a quick response, but a complete one from a rep who is experienced to answer their query.

That's win-win-win!

Not only can chatbots reduce response time, but they can also ask interested leads if they'd be interested in a demo. For leads that want to learn more, the smart bot can book meetings with you automatically.

That said, there's a third benefit to leveraging AI chatbots: gathering lead intelligence and positive signals. For example, a lead that visits an upgrade plan page on your site shows a positive buying signal.

Having this information available means you can proactively reach out to prospects and offer help.

Also, bear in mind, 82% of buyers accept meeting calls from salespeople who reach out to them. So there's no reason to hesitate. With the information you gather from your smart bot, you can even tell who'd be interested in hearing from you.

Put simply, an AI chatbot helps you close more deals by:

- Reducing lead response time with the bot replying to common queries and routing unique ones to you
- Booking more meetings with prospects interested in talking to you
- Proactively reaching out to prospects interested in buying from you

02 Engage in meaningful conversations & book more meetings

To nurture a lead, it's essential you engage them in meaningful conversations. But that's challenging work if you have no idea of a lead's interests and their touchpoints with the business.

Consequently, you can't engage them in context-driven conversations, reducing your odds of converting them. However, a Customer 360 view can help. Read on to find out how.

Get a full picture of leads' behavior

A 360-degree view into lead information with a Customer 360 view gives you access to behavior-based website and email tracking.

What this means is, you can see the web pages a lead visits on your site and the content they've downloaded. You can also get a full view of how a lead interacts with your emails – their click-through rates, their response rate, and so on.

This is essential data for understanding a lead's interest and getting the context necessary for having engaging conversations.

For instance, you can tell a lead that has visited your pricing page is more interested in buying from you than one that has visited your home page. Similarly, a lead that opens all your emails (or, at least, lots of them) is considered to be more interested than someone who occasionally opens your emails.

You can use the same information to find context for driving meaningful conversations. Let's say a lead downloads an ebook that explains how to use 'feature X' in your product. This tells the lead is interested in 'feature X'.

Use this context to talk about 'feature X' to engage the lead better versus talking to them about how your product can generally help them grow their business.

Understand why a lead is sales-ready to fine-tune your conversations

Even if you have the required context to have interesting conversations, you might still not be able to hit the mark if you aren't sure about a prospect's exact pain points and how to address them.

Put another way, you can't talk to a CEO the way you would talk to, say, a manager. Both of them have different priorities and pain points. Fine-tuning your conversation to their profile adds the final touch needed to have engaging conversations.

The impending question now is: how can you tell if a lead is a CEO or a manager? Or, whether they live in Austin or Dallas?

Again, a Customer 360 view has the answer to your problem. Not only can it tell you which leads are qualified, but it can also suggest why they're qualified. Thanks to the 360-degree understanding of a lead, scoring factors reveal what gets a lead a qualification score.

For instance, a lead that unsubscribes from your newsletter is considered a negative scoring factor. In contrast, a lead that comes from a region where most of your past leads have converted from is a positive scoring factor. Similarly, if most of your past successfully converted leads were CEOs, a new lead that's also a CEO gets a positive score.

This means scoring factors factor in:

- A lead's descriptive behavior. For example, where a lead is from and their role
- A lead's interaction with your business. This includes their on-site, in-app, and email activity to gauge their interest
- Past historic leads data to drive patterns from the behavior of similar leads who have converted in the past

Use these scoring factors to your advantage. How? By polishing your conversations. So if you're talking to a CEO, you can explain how a feature they're interested in improves their business growth. If you're conversing with a manager, tweak the narrative to explain how the feature can help improve their team's growth. By doing so, you'll solve a problem that's specific to your lead.

In a nutshell, a Customer 360 view can help you have contextual conversations to close more deals by:

Use these scoring factors to your advantage. How? By polishing your conversations. So if you're talking to a CEO, you can explain how a feature they're interested in improves their business growth. If you're conversing with a manager, tweak the narrative to explain how the feature can help improve their team's growth. By doing so, you'll solve a problem that's specific to your lead.

In a nutshell, a Customer 360 view can help you have contextual conversations to close more deals by:

- Offering a holistic view of a lead's interaction and touchpoints with the business. This shows how interested they are and what they are interested in
- Providing scoring factors to explain why a lead is qualified so you can refine your conversation accordingly

03 Engage with prospects at the right time

A crucial aspect of closing more deals is taking the right steps at the right time.

A lead might be interested in buying your product or service, but they might not be willing to act right away. So the right move is to nurture the lead until it's time for them to buy.

The problem? You tend to move prospects through your sales funnel at your pace – not theirs. This means if you don't take the time to nurture a warm lead, you might end up losing them altogether.

With a journey builder, you can move prospects through their buyer's journey at their pace by engaging them in a timely manner.

Basically, a journey builder is based on a prospect's on-site, in-app, and email activity. From a lead's activity, it sends pre-defined, automated emails that nurture it while reducing your workload.

Here's how it works: Say a lead visits your pricing page, the journey builder sends an automated email sharing more information on the pricing plans available.

Similarly, if a "free trial" user attempts to add more members to the app, the journey builder sends an email about upgrading their package to add more users.

This way, you can have contextual conversations based on a lead's behavior – offering more value and booking more meetings with interested prospects. This also saves your time as you don't have to micromanage your interactions with leads.

Hence, a journey builder can help you book more meetings and close deals faster by:

- Engaging with leads based on their product, email, and on-site behavior
- Having contextual conversations with prospects
- Saving your time with automated workflows

In short

A Customer 360 view can help you close more deals and hit your sales quota. To this end, it helps you in more ways than one:

- Engage with sales-ready leads using a predictive scoring model
- Book more meetings, answer common queries, and gather lead intelligence by leveraging an AI chatbot
- Have meaningful, context-driven conversations with leads by accessing a holistic view of lead information through their in-app, email, and on-site activity
- Nurture prospects with a journey builder that engages them based on their interaction with the business

About Freshworks

Freshworks provides innovative customer engagement software for businesses of all sizes, making it easy for teams to acquire, close, and keep their customers for life. Freshworks SaaS products provide a 360-degree view of the customer, are ready to go, easy to use, and offer a quick return on investment. Headquartered in San Mateo, California, Freshworks has 3,100+ dedicated team members serving our customers throughout the world.

For more information visit https://www.freshworks.com/