



Sales automation guide

The end or a new beginning?

pipedrive

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Is automation just another buzzword?

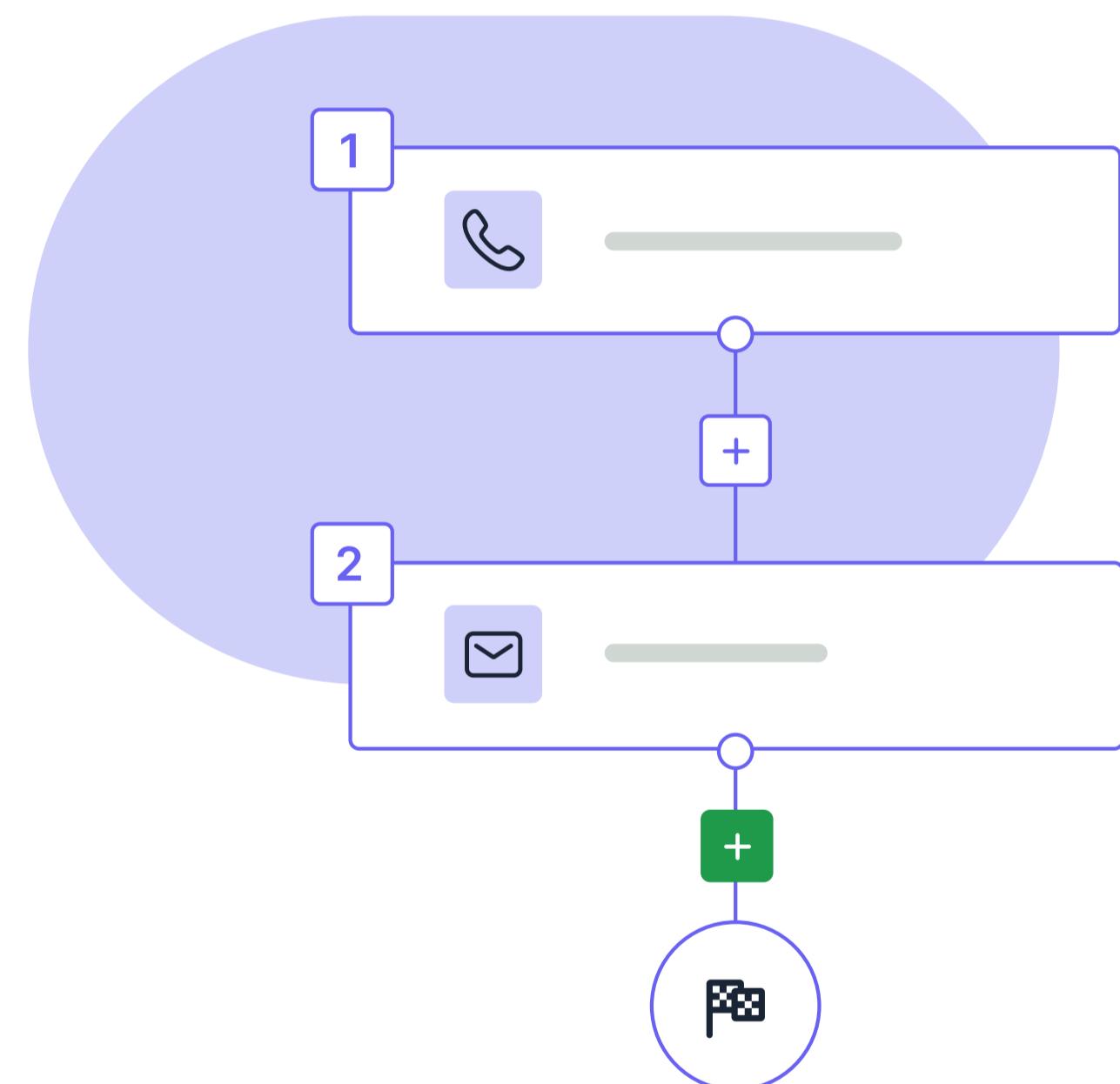
Automation is creeping into every part of our lives.

And the pace of change in automation technology is so rapid that we're finding it almost impossible to keep up with the next new thing.

You can ask Alexa for your saved shopping list and fill your cart with your week's supplies.

As you check out, your details are pre-filled into the web form, and your PayPal account turns payment into a seamless one-click experience.

If you have any problems as you go, you can pull up a live chat window and speak to a "chatbot" who magically answers your question.



What is sales automation?

In short, sales automation is the process of automating repetitive tasks and activities within a sales role. This could be automating email responses, call logging, data entry or any other administrative task associated with a sales professional's workload.

Should you be scared of automation?

The size of sales teams may shrink as teams and processes become more efficient. A high proportion of low-skilled roles revolving around repetitive administrative work will be replaced by cheaper, faster and more accurate automation technology.

But, on the flip side, the best-performing sales professionals are set to reap significant benefits from the upsurge in automation. Freed from the shackles of repetitive tasks such as admin, note taking and data entry, quality sales reps will be able to spend much more time actually selling. This increase in the proportion of strategic work makes a good sales pro an even more asset for a growth-oriented business.

More time selling means higher profile roles for quality salespeople.

As the sales team becomes more productive, businesses will feel more confident growing the sales function, which means more salespeople will need to be hired.

So, although automation may reduce the number of unskilled sales-related roles, better opportunities will continue to open up for professionals with quality relationship management and communication skills (two essential parts of selling that are much harder to automate).

Sales is all about building connections, which demands a human touch—so there will always be a place in business for sales professionals with good relationship management skills, right?

Or will automation technology develop to the point where a digital program can handle roles and tasks that require greater levels of creativity and emotional intelligence?

Is automation threatening the human part of sales?

The launch of OpenAI's ChatGPT tool has inspired dozens of news stories about how the emergence of sophisticated AI will impact employment in a number of big industries.

However, the truth is that automation and AI are not the brand-new phenomena the media makes them out to be. In fact, automation has existed as a concept for millennia.

Automated, self-operating beings are referenced in Greek mythology. "Automatons" helped the god Hephaestus create the weapons to be used by the gods of Mount Olympus. Even in ancient civilizations, people recognized the value of working faster, with fewer errors.

The fear of automation taking jobs away from workers is nothing new. Take this simple example from the 1960s:

In an address to a [Senate labor subcommittee in 1965](#), John Snyder stated that "Automation is a major factor in eliminating jobs in the United States at the rate of more than 40,000 a week."

If that statement was accurate, over 100 million jobs would have been lost due to automation since then. In reality, only 6.5 million are unemployed at the time of writing in the US.



But what about now? Are there any predictions for how automation will impact employment rates in the future? Of course!

Let's just look at predictions for jobs created or destroyed by the 2030s for now:

Sources	Jobs lost to automation
Futurist Thomas Frey	2,000,000,000
McKinsey	400,000,000 to 800,000,000
PwC	30% of all jobs

While the experts can't agree on the effect of new technology on the broader population, we can zero in on sales automation to give you a clearer understanding of the impact on your career.



Why is the future of sales automation critical?

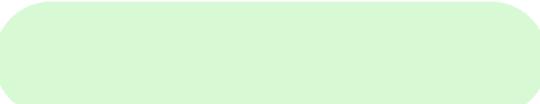
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Automation is changing the sales industry. There's no disputing it.

But, while we can't prevent the change, we can control how it happens.

Sales automation tools like chatbots and live chat apps have already started to filter their way into the sales process, with the main argument for this being convenient for both sales reps and customers.

While it's true that sales automation is likely to replace simple, repetitive, unskilled sales jobs, it's also true that AI frees up time for skilled salespeople to work more effectively.



72% of business leaders believe that AI will help humans focus on more meaningful work.¹

[1. Bot.me: How artificial intelligence is pushing man and machine closer together, PwC](#)

The bottom line: salespeople should be selling.

Anything that stops reps from selling, whether it's setting up an email or writing up call logs, is holding back revenue growth.

By taking advantage of automation tools, they can spend less time on admin and more time talking to prospects and developing deep, meaningful relationships with customers—something chatbots aren't yet able to do.

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There are so many think-pieces about how AI will replace salespeople, but I think it will simply thin the herd. The future isn't "death of a salesman," it's "death of a lazy salesman." The best salespeople will embrace it and automate their lives to spend more time closing.

Chris Fago,
Cloud Security Specialist at RedLock



The benefits and possibilities of sales automation

For skilled salespeople who can't wait to rid themselves of menial tasks and spend more time doing what they love—making sales—the future looks bright.

Here are five of the best benefits of, and possibilities for, sales automation:

1. Increased efficiency

With sales automation tools doing all of the menial tasks—anything from note-taking to looking for someone to call—efficiency and productivity increase, allowing sales reps to spend more time selling and growing the business as a result.



60% of consumers agree that AI can reduce the time it takes to get answers while still being highly tailored to their preferences.²

2. Sales forecasting

With automation software recording past and current sales trends, you'll have access to data that can help you better identify future prospects and forecast future sales to predict incoming revenue.

² <http://www.pwcartificialintelligence.com/#amplifying-service>, PwC

3. Say goodbye to repetitive tasks

Doing the same thing over and over again is enough to drive anybody crazy. No one likes repetitive tasks, and that's why society has been dreaming about automation since the days of Greek mythology.

Now that it's finally here, sales teams can say goodbye to that repetition and spend more time on revenue-generating tasks.

4. Spend more time making connection

With automation software taking care of all of the "boring stuff," reps can finally make talking to customers and, crucially, selling them their main focus.

5. Pipeline management

All sales reps seem to have their own way of managing their prospects and keeping track of their daily tasks, but this can make pipeline management difficult. By automating your (and your team's) pipeline on one CRM, you'll have total visibility across all your sales. This ensures reps know who to contact next and when, so they can stay in complete control of their sales process.

The mistakes and dangers of sales automation

As with any new technology or process that is implemented into your business, things can definitely go wrong, and there are pitfalls that you're going to want to avoid.

1. Losing the personal touch

Sales is an industry built upon relationships, and even with the rise in automation, it's important to keep that human side of sales alive. If you automate every interaction customers have with your business, you are probably going to confuse, frustrate and lose those customers pretty fast.



How to avoid this mistake

Never use automation in a situation where prospects would benefit from talking to a real person, especially when empathy is required.

Instead, automate tasks that need very little input from customers. Calendar invites and follow-up emails are solid examples.



35% of business decision-makers said their biggest concern with AI customer service was a loss of human touch.

2. Juggling different systems

Sales reps already have to juggle a lot. If you start automating your systems, or select platforms for their automation, make sure that you can connect them to one another.

If your CRM doesn't connect to your lead management system, and your lead management system doesn't connect to your calendar...Well, you get the idea. There's very little point in automating lots of different systems only to manually fill in the



How to avoid this mistake

An all-in-one sales automation platform like [Pipedrive](#) will help you create a cohesive sales process for your team to follow.

3. Automating the wrong stuff

It's crucial to strike a balance between bots and reps. For example, it's fine to use an automation tool to set up a demo call, but then a real sales rep needs to deliver that demo. The salesperson must control the pitch. You need to be able to respond to questions, control the conversation and generate a connection with your potential customer.



How to avoid this mistake

Don't jump in at the deep end with automation. Look at your sales process as a whole and decide what can and cannot be automated. If you take it slowly, you can easily scale back if you realize you have automated the wrong tasks.



4. Not setting goals

Email workflows present a clear opportunity for time-saving automation. Use inbound triggers to develop lead nurturing campaigns that educate leads on how to solve their specific pain point. This is a bedrock for scaling your sales.

You slash the time your sales team spends before the lead is qualified and ready to become a customer, at which point the rep can step in to build a connection.

However, it's important that all of your workflows have clear goals.



How to avoid this mistake

Determine your conversion goals before you set up your workflows. Ask yourself what you want from each automated task.

- Do you want to directly increase ROI?
- Do you want to route a lead to the right team member?
- Do you want to generate specific data?
- Do you want to nurture a lead?

Make sure you personalize your email workflows with smart automation tech. Use the information you have gathered from the lead to enhance their experience. Customize each flow to match the specific trigger.

5. Failing to test your workflows

With automation, it can be pretty tempting to “set and forget” everything. But if you fail to test, review or optimize your workflows, then you risk leaving extra deals out there for a competitor to grab.



How to avoid this mistake

Have a play with vocabulary, images and call-to-action buttons to find the best formula for attracting leads and nurturing them into customers.

However, you'll need to be ready to jump in if automated emails are putting people off—it's vital to know when potential leads need the human touch in the sales process.

It's clear that while automation can be an incredible tool for your sales team, there are certain tasks that should never be automated.

How do you find the balance?

Dive into our dedicated [explainer article](#) > What Sales Tasks Should You Automate (and What Should You Not)?

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Sales automation tools that accelerate revenue growth

1. LeadBooster

It's increasingly possible to automate the earliest stages of interaction with sales leads via chatbots.

Chatbots work around the clock, answering customer questions and qualifying leads by asking questions and pointing them in the right direction based on the answers.

Potential customers get an immediate, on-script response and a consistent experience. The answers they provide can then be shared through into your CRM system to be followed up, with immediate questions answered and leads qualified.

This puts the sales rep in a great position during the first conversation, giving them more time to spend on quality conversations and less time to waste on finding information.

Our conversational LeadBooster Chatbot enables your business to automatically qualify more leads, book more meetings and close deals faster.

It engages in conversations with your website visitors as soon as they land on your homepage, turning your site into a full-time lead-gathering machine.

Think of it as a tireless team member who never stops engaging with potential customers, no matter what time of day or night. Our Chatbot asks essential questions and provides answers where needed before handing over a warm, qualified lead to your sales team.

2. Zapier

Anyone involved in sales will know that there are a lot of moving parts in the process. A whole host of brilliant software tools have been created to collect customer data and move customers through the sales journey. Unfortunately, these pieces of software generally can't share data with each other, leaving you with a lot of manual work picking data up and entering it into various different places.

Zapier eradicates time-sucking tasks from your workload: It's essentially a "connector" between the various web apps you use.

You can streamline and speed up your most important sales processes: capturing leads and deals, updating deal stages, centralizing contracts, tracking action items, setting up notifications and alerts and communicating updates to your team.

So, if you use a web form to collect feedback or information from your customers, you could set up a "zap" workflow that connects that data into a spreadsheet or directly into your CRM/sales hub.

In simple terms, Zapier (which can be used [in tandem with your CRM](#)) lets you capture information from all the apps you use for your sales process and arrange it into your pipeline based on the rules that you set.

3. Pipedrive

Here at Pipedrive, our [Automations](#) feature has been designed to help you sell smarter and save time, which you can then reinvest into building better customer relationships.

With this feature, you can automate just about any step of your sales process and set triggers and desired actions.

For example, you can automatically send a personalized email whenever a deal is created or reaches a certain stage.

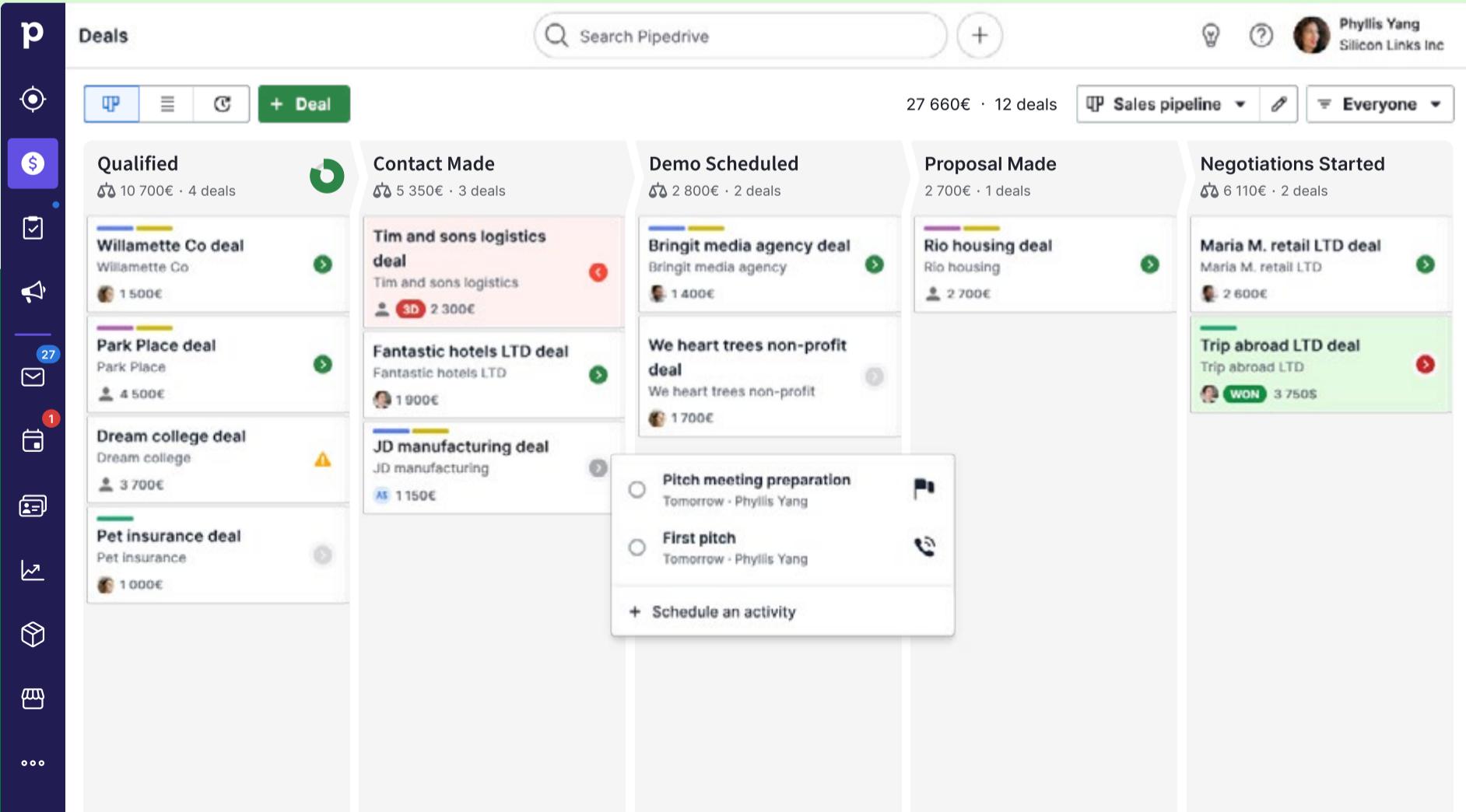
[Scheduler](#), meanwhile, makes booking meetings a breeze, as you can set up meetings simply by sharing your availability and letting your invitee book a time that works for you both.

Why a repeatable sales process will help you use automation correctly

With a repeatable, measurable and consistent sales process, you'll find it so much easier to identify the areas where you can use automation to eradicate manual, repetitive tasks.

This will help you to build a more highly skilled sales team that can focus all of its energy on selling.

You can test Pipedrive out for yourself with a [14-day free trial!](#)



The screenshot shows the Pipedrive software interface for managing sales deals. The top navigation bar includes a search bar, a deal creation button, and user profile information for 'Phyllis Yang' from 'Silicon Links Inc'. The main area displays a 'Sales pipeline' with five stages: 'Qualified', 'Contact Made', 'Demo Scheduled', 'Proposal Made', and 'Negotiations Started'. Each stage has a list of deals with their respective details, including names, companies, and amounts. A sidebar on the left contains various icons for navigating through the software, such as deals, contacts, tasks, and reports. A modal window is open in the bottom right corner, showing two scheduled activities: 'Pitch meeting preparation' and 'First pitch', both set for tomorrow with Phyllis Yang.