Bigtincan™

Zoom

Zoom Video Communications is the maker of a cloud-native platform that enables people to communicate over a distance with video, voice, chat and content sharing.

Challenge

Lack of consistency in data results in ineffective sales coaching

Sales managers at Zoom relied on data across a combination of dashboards and spreadsheets to manage their teams and coach their reps. All of that data was pulled from different sources without much consistency; the sales operations team maintained their own KPI dashboard, the business operations team generated a set of data analytics using their business intelligence platform and – broadly – the company had many different Salesforce dashboards.

Typically, sales managers were left to cobble together data about their teams from all these different sources. Some managers had ten or more tabs open during one-on-one meetings with reps. Other managers created their own spreadsheets to get the holistic view they needed to coach their sellers.

The bottom line was that some managers were using data to be effective sales coaches, but others weren't. This problem was magnified by Zoom's rapid growth:

1. The company now had multiple segments with different goals and metrics;

2. Many sales managers were newly hired or recently promoted from the ranks of account executives; and

3. The company was constantly hiring new sales reps who needed to be ramped up.

> By enabling sales managers to be more effective, data-driven sales coaches, we can have a direct impact on sales performance. With Sales Rep Scorecards, sales managers in every segment can see what's working and what isn't.

Hilary Headlee
Head of Sales Operations and Enablement for Zoom

Identifying reporting gaps and opportunities

Lack of consistency in data results in ineffective sales coaching

Hilary Headlee, Head of Sales Operations and Enablement at Zoom saw the opportunity to improve sales performance with better sales coaching and chose to enable sales managers with a data-driven sales coaching approach. The first hurdle was giving managers the ability to sort through all the data to find and diagnose deficiencies in sales skills. Zoom has an extensive set of Salesforce dashboards, and business analytics in Domo.

With no consolidated view of data for sales teams, some sales managers would monitor their reps' performance with lots of different tabs open to all of the different data sources. Others built spreadsheets to create consolidated views of their teams and reps. There was no consistency in terms of metrics.

As Headlee spearheaded this initiative to enable sales managers to be data-driven sales coaches, **she chose Readiness Scorecards from Bigtincan to execute her plan.**

How Zoom enables data-driven sales managers to drive growth with scorecards

## Understanding sales performance with Scorecards

With Readiness Scorecards, Zoom can now consolidate sales rep data into a single view.

Managers get a 360-degree view of each rep, without having to use multiple dashboards to understand rep performance. They can more easily diagnose deficiencies by benchmarking each rep against their peers and top performers and showing reps where they're falling behind. For one-on-ones, managers and reps can monitor sales rep comparisons, quota attainment, pipeline coverage, sales velocity and lead analytics in order to see trends. At the team level, scorecards give managers immediate visibility into quota achievement, pipeline coverage, open and expired pipeline by opportunity stage, lead conversion analytics and sales velocity metrics. Managers can use the sales rep comparison feature during onboarding to compare reps against each other and see who is outperforming and who is lagging. Readiness Scorecards also show sales rep performance over time, which helps managers track improvement over the ramp-up period.

As Zoom grows, they can easily update Sales Rep Scorecards as needed.

For example, Zoom introduced Zoom Phone in 2019. Over time, it will become important for Zoom's sales managers to see which products have been purchased by customer accounts. This is a way of identifying cross-sell opportunities.
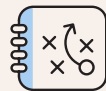
More broadly, Zoom now has a data-driven coaching framework that can be replicated across the entire organization.

By comparing reps to top performers, managers can show reps what it takes to be the best and what metrics need to be improved to drive commitment to goals. From there, managers can use Readiness Scorecards in weekly one-on-ones to track these metrics over time and against goals.

Readiness Scorecards also help new sales managers get up to speed.

Many don't have any experience as a sales manager and don't know how to pull together or analyze data to manage their teams. With Scorecards, all the critical metrics and data are brought together in one place, so managers can focus their attention on identifying deficiencies. Scorecards also categorize KPIs as red, yellow, or green to easily distinguish where a rep needs to be coached. Even new managers can quickly diagnose problems, create improvement plans and track metrics over time to make sure sales reps stay on the right track.