



Virtual Selling: Behind the Screens

4 Proven Principles to Help Your Sales
Teams Master The New Virtual Reality

Virtual interactions are now **2-3x** more important

Of the myriad adjustments on everyone’s mind in the “new normal” are many firms’ concerns with remote selling capabilities. Virtual interactions are now seen as two to three times more important than traditional sales interactions in Business-to-Business sales.¹

As a result, a vast majority of firms have altered their “go-to-market” strategy to incorporate remote selling.² It is increasingly clear that virtual sales are quite different from both face-to-face and inside selling.

Many organizations have expressed uncertainty with gaining access in a virtual environment, engaging with the prospects remotely, communicating key messages through a new medium, and closing sales effectively under these emerging constraints.³

We’ve applied our approach to framing and solving difficult questions to identify practical, creative solutions to this once in a lifetime business challenge.



Beyond Just Tech

Virtual sales undoubtedly will be more familiar to some firms than others. Players in Technology and E-Commerce, for example, likely entered the market with the expectation of having to interact with clients remotely. This does not mean that all businesses must now teach themselves to be more like Tech. **The practices that work for Tech may not be appropriate for everyone.**

The challenges of access, engagement, communication, and closing have been successfully dealt with inside and outside of the sales context across many sectors. You just need to know where to look.

Some of the answers will be intuitive, however many of the challenges associated with virtual sales are treading on novel terrain and will require new thinking...and there lies the rub. Unlocking the formula to transforming your live sales teams into effective virtual sales specialists requires seeking insights from past successes, not creating an unknown future.

PATHWAYS TO INNOVATION

After conducting thorough precedent research across sectors and functions beyond sales, several key findings emerged.

The firms we discuss are examples of how to successfully address challenges associated with each of the four critical areas of virtual sales.

While this is certainly not an exclusive list, [these firms can each offer tremendous insight into what successful access, engagement, communication, and closing look like.](#)

Understanding how these insights relate to your firm's virtual sales concerns is how you chart a course toward innovation and growth in a period of uncertainty and rapid change.



ANSWERING THE CRITICAL CONCERNS

Adapting to a new interface of client interaction requires a deep understanding of what makes client interaction successful.

The following precedents demonstrate how organizations can **access** clients from new situations, **engage** with a remote audience, **communicate** with clients across new mediums, and, ultimately **close** the deal on sales.



Accessing a Remote Audience



Virtually Engaging Customers



Optimizing your Communication



Closing the Deal



amazonfresh

Southwest

BURROW

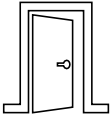
IBM



WISTIA



Accessing a Remote Audience



To gain access virtually, firms must understand the new platforms that they can embrace. The following are examples of companies that capitalized on opportunities to access customers in the face of uncertainty and change.

Gameloft is a French videogame publisher that started in 1999 and transitioned to touchscreen-based video game development in anticipation of the proliferation of smartphones in the 2000s.⁴ Today, they continue to proactively adapt their games to new platforms - like when they perfected their games transition to tablets or when they added characters to “Spiderman Unlimited” from the blockbuster release of “Spiderman Homecoming.”⁵ By **identifying and leveraging emerging platforms** while incorporating new media, Gameloft was able to adapt to the breakneck speed of the gaming world and continue to access customers.⁶

Another organization, **AmazonFresh** accessed an entirely new population, not just by acquiring Whole Foods, by **recognizing and coopting its strategic access to established networks** of suppliers and customers.⁷ An entirely different firm, **Red Bull** has become a gold standard in accessing diverse global markets by allowing different sales teams in each country the **freedom to customize their approach to access**.⁸ As a result, Red Bull Canada became involved in music, while in other markets Red Bull has sponsored local and national sporting events.⁹

Our precedent research revealed many ways firms that have accessed populations of customers against all odds. To get in touch with new audiences remotely, it is vital to understand their transforming requirements. Like Gameloft, it is essential to understand the platforms your client’s prefer inside and out. How is this done? Ask yourself: what are the client’s preferences in video chatting? Is there a social media site with a suitable pre-existing audience? Or are there any methods of virtual communication that are particularly appropriate to your product/message?

Next, like AmazonFresh, leverage the networks you have at your disposal and, like Red Bull, give sales teams the freedom to customize accordingly.



Virtually Engaging Customers



Many salespeople may find themselves scratching their heads on how to replicate tried-and-true experiences they know how to create in a virtual setting. The following examples demonstrate how in the face of adversity, brands have upheld consistent and authentic engagement with their customers by elevating their own cultures higher order purpose and integrating this with their virtual interactions.

Wistia is a growing video marketing company that prides itself on its commitment to customer support. After launching, the found themselves expanding beyond what their customer support line could handle and decided to take their phone number off their website to focus on email support.¹⁰ This allowed them not only to reach more customers but also to better and more efficiently address their problems.¹¹ Although it was a tough decision to abdicate phone support, the switch to written correspondence ramped up customer support efficiency.¹² By **placing values over old habits**, Wistia was able to improve their customer engagement during a dynamic period.

Similarly, by sticking to their values, **Southwest Airlines** became renowned for fantastic customer support in an industry where good service is a rarity.¹³ When the company began growing its team, they made sure to prioritize culture fit, balancing it with their development goals to maintain customer-centricity. **Values do not have to be limited to customer service**, in fact - anything your organization genuinely cares about can be a jumping-off point to stronger bonds. Groups like **Philanthropy Without Borders** recognized this and capitalized on the **potential of meaningful connections** when engaging donors in response to the outbreak of COVID-19.¹⁴

Putting values first is an essential element of all customer engagement but becomes even more essential in a virtual setting. As demonstrated by Wistia and Southwest, it is worth it to make sacrifices on behalf of what you care about. In remote interactions, it is more important than ever to have a strong company culture to develop deeper connections with customers. Signaling what your organization cares about helps establish common ground, despite being further apart.

WISTIA

Southwest



Optimizing your Communication



Increased visual freedom and tremendous analytical potential are two of the key benefits of communicating virtually. The following companies understood the benefits of their virtual medium and optimized their messaging accordingly.

Burrow is an assemble-it-yourself sofa maker, who attempts to bridge the gap between cheap, disposable furniture and expensive pre-assembled items.¹⁵ Sourcing most of their sales online, Burrow frames their content and pitch in terms of how their furniture will look and function in a realistic setting.¹⁶ The company understands the **importance of visual messaging in remote content** and takes care to create empathetic, storytelling content that both differentiates their brand and showcases their concern for the customer's experience.¹⁷ Using their visuals to depict how they can offer more options for the casual furniture buyer has helped them continue to grow.

This insight is not limited to Burrow. Healthcare innovator, **GSK**, reimagined physician education programs by **repurposing their story for different screens** including Virtual Reality. Understanding the potential of technology to improve their storytelling and captivate the sophisticated audience they serve; GSK was able to optimize their messaging.¹⁸ Optimization is not limited to visual improvements. **Kareo**, a business management platform, was able to increase remote sales that increased conversion and effectiveness by **leveraging prior conversation data**.¹⁹

It seems intuitive but understanding that much of your communication with clients will be through a screen is essential to optimizing your message. This could mean having stellar visuals like Burrow or GSK, or having airtight data on remote interactions like Kareo. Either way, remote interaction offers tremendous potential for improving any organization's communication.

BURROW



Closing the Deal



Perhaps the most difficult challenges in virtual sales lie within the closing stage. Building customer interest and trust at a turning point in their virtual experience can be the dealbreaker. The following examples demonstrate how to find just the right moment to close the deal.

Technology juggernaut – **Microsoft** is no stranger to the importance of digital sales. The digital sales team is co-located within state-of-the-art sales centers and has a direct line to cutting-edge homegrown technologies.²⁰ Among other things, these technologies utilize AI to help sales teams **exceed customer needs at just the right times in their digital journey**.²¹ While not every firm has access to the machine learning capabilities Microsoft develops, grasping the customer’s journey and turning the corner from education to sales at just the right time is universally important.

To turn that corner, it is necessary to cultivate trust first. **IBM** illustrates this through a series of “Design Thinking” workshops which help team members **prioritize their users over business concerns that could compete**.²² Anticipating the needs of internal and external customers is essential in building sufficient trust to make a sale. Further, **Spotify** illustrates how you can **“reframe” your sales perspective by catering your product to an individualized experience**. They outpace their competitors in part by catering music recommendations in terms of what their users might be engaged in (sleep, exercise, dinner parties, etc.) rather than just the music itself.²³

Closing the deal is not an easy thing to accomplish remotely. Many firms can educate and inspire, but it is the ones who find a way to transition a relationship into a sale that succeed. The examples above show that the keys are trust, perspective, and timing. We learn from IBM and Spotify that reframing and prioritizing customer perspective builds trust and from Microsoft that deciding when to close the deal can make all the difference.



KEY TAKEAWAYS



Leveraging platforms, capitalizing on your networks, and customizing your approach are all ways to access changing populations



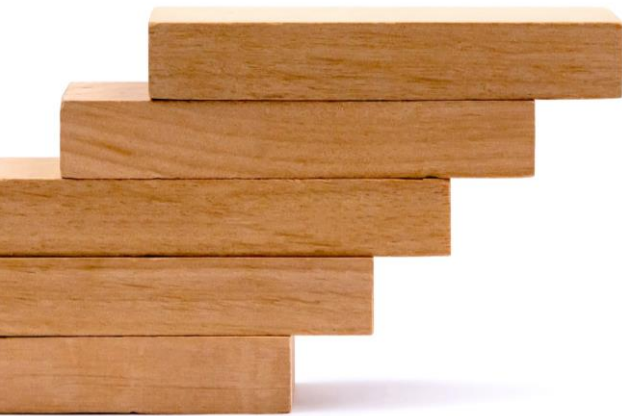
Putting your values first can form opportunities for connection and engagement with customers



Understanding the benefits of virtual communication like greater visual freedom and data analysis allows you to optimize your messaging



“Reframe” your perspective to build interest and trust at a turning point in customers’ virtual experience to close the deal



We understand that, despite a tumultuous spring and summer, many firms may still be on the cusp of their virtual transformation. The degree to which **remote selling will likely continue to grow** is unprecedented to say the least.






There is undoubtedly still much insight to gather as this sea change runs its course. With that said, there is much to be learned from the 16 precedents that we compiled and approximately 50 more companies we analyzed.

Above all, we hope that this insight can be helpful to you when considering some of the key questions that the current crisis posed:

- How do we overcome internal IT constraints to offer our customers 100% platform flexibility?
- What aspects of our corporate culture are relevant to our customers and how do we seamlessly weave them into our sales messaging?
- How can we quickly elevate the visual and story-telling aspects of our sales message through existing technologies?
- Can we create a virtual engagement customer journey and pinpoint the optimal timing to close our customers?

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AUTHORS



Dominic Conoshenti
Recombinators Intern
Student at Fordham
University Law School, NY



Andrey Meshcheryakov
Senior Consultant
Recombinators, NJ



Eric Albinyana
Recombinators Intern
Student at Imperial College
School of Medicine, London



Nadim Yacteen
Managing Partner
Recombinators, NJ

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