



The Essential Guide to Virtual Selling

How to Hit Your Targets and Stay Ahead of the Competition



Mastering Virtual Selling

Virtual selling—working a deal remotely when you can't be there in person—is the new normal for B2B salespeople. But being a great virtual salesperson doesn't mean simply conducting every meeting via video conference. Virtual selling means understanding a prospect's mindset when you can't meet in person, using all the tools and techniques available to close the deal. While the fundamentals are the same, you have new obstacles to overcome and new skills to master.

Allego's learning and enablement platform accelerates results for virtual teams. From our work with hundreds of thousands of sales professionals around the world, we've developed unique expertise in virtual selling techniques that can give you the edge you need to hit your targets. This guide distills that learning to help you and your team understand how to master virtual selling and stay ahead of your competition.



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What is Virtual Selling?

Virtual selling means working and closing the deal when you can't be there in person. It's an experience mediated by technology in which sellers communicate, collaborate, and connect with prospects via desktop, laptop, tablet, or mobile phone.

Successful virtual selling depends on a technology solution that allows sellers to nurture prospects, share information, conduct demos, and host meetings without the benefit of sitting side by side. It may seem simple—just move your meetings online, right?

But technology isn't all sellers need. You also need to add new skills of engagement, technical aptitude, active listening, follow up, and time management to your toolbox of selling techniques.

This guide will demonstrate how salespeople can overcome the challenges of maintaining prospect and client relationships remotely to move them through the sales cycle, without relying solely on live video conference meetings. The key word is live. Live video conferencing, while a convenient tool, is fatiguing for both prospects and reps and can be difficult to schedule. Simply hosting day after day of live video calls is not the way to be a great virtual seller.



Amplify with Pre-Recorded Video

The best way to differentiate yourself, nurture a prospect, fight screen fatigue, and master virtual selling is to amplify and enhance your live meetings with pre-recorded video. Sharing video allows you to convey personalized sales messaging before, during, and after a sales call and lets prospects view your message on their own time, when they're not jumping from call to call.

Whether to prime the prospect's thinking leading up to a meeting, recap key discussion points, or action items directly afterwards, stand out from a crowded field when prospecting, or remain top of mind throughout the entire sales process—pre-recorded video is a virtual seller's most powerful tool.



Pre-recorded video is a virtual seller's most powerful tool

Why Virtual Selling is a Critical Capability

Almost 90 percent of sales have moved to a remote model since the pandemic began, according to McKinsey. Almost every B2B company's products and services are now being sold virtually. And to make matters more complicated, many companies are either slowing their buying cycles or freezing them completely.

Intelligent virtual selling is the only way to overcome the current economic or business uncertainties that lead companies to defer a purchase. Sellers who can build trust with their prospects and convey the right information using virtual techniques will be the only vendors who can break through buyer inertia and make the sale in today's environment.

Understanding the customer's objectives, challenges, and needs is more important than ever.

Even if your business was already selling virtually, it now has competition from every other vendor. Moving out of your comfort zone and mastering the techniques associated with virtual selling are critical during the pandemic and will remain so long after the virus has run its course.

But successful virtual selling is not just about skillful execution of these tactics; it's about winning the sale in this new environment.

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How to Overcome Eight Virtual Selling Challenges

Because some buyers are only comfortable buying in a face-to-face scenario, the sellers who will win in a virtual world are those who can do the best job of replicating that environment. Otherwise, you'll find yourself on the outside, looking in.

The good news is that experienced sellers don't need to master new selling techniques—the fundamentals are the same as they've always been. But virtual selling requires focus on a few core skills that will enhance the sales process while distanced. See how sellers can overcome eight new challenges and be successful in a virtual world.



Challenge 1: Collaboration

Sellers need up-to-the minute information to win deals—market conditions, customer insights, competitive intelligence, win / loss stories to name just a few. Pre-pandemic, teams would share these tips from the field in weekly meetings and calls. But plenty of wisdom was also passed on in the break room over a cup of coffee or after work at the bar. Today, it's much harder to stay connected with peers and share knowledge without these informal connections.



Solution 1:

A key to overcoming this challenge is capturing and sharing best practices from subject matter experts and the field. Make it easy for reps to record themselves on video and share whiteboarding techniques, negotiating strategies, and more. This information is essential for sellers—particularly newer hires—to understand so they can be successful during the pandemic and beyond.



Challenge 2: Agility

Virtual selling requires flexibility and more extensive groundwork since sellers have less in-person interaction and fewer opportunities to understand buyers. But being fully prepared for every call is harder than ever when prospects' situations are less predictable. Reps have to be ready to meet different content and messaging needs at a moment's notice.



Solution 2:

Ensure reps can deliver the right content to prospects, no matter what situation is thrown at them. Use a platform that allows reps to create, access, and share content at the moment of need.



Challenge 3: Differentiation

Standing apart from your competition is more fraught when you're not able to meet in person. There's both a greater need and an opportunity to follow up after virtual sales calls with something that will differentiate your value proposition. Instead of an email drip, sellers need to reinforce what they covered on the call as well as tee up the next interaction. Additionally, it's more critical than ever to use follow up to establish a personal rapport with buyers and build trust.



Solution 3:

Pre-recorded video and content sharing tools can add depth and engagement to your sales process, differentiating sellers from the competition. Reps can send personalized video messages within their introductory emails and track activity on video/collateral to see engagement and buying intent.



Challenge 4: Engagement

The virtual buying experience can be distracting. It's harder to get and keep prospects' attention during a virtual meeting vs. an in-person one. People are experiencing Zoom fatigue, back-to-back calls, and can get easily distracted by external alerts and notifications. However, when everyone's on video there's a lower chance of people multitasking than if they're on a phone-only conference call, especially with a larger group.



Solution 4:

Make sure your reps work harder to capture and keep people's attention when they can't be there in person. Use pre-recorded video to build relationships and create highly engaging sales decks and interactive sessions.





Challenge 5: Technical Issues

Everyone struggles (occasionally) with sound, video, or internet access. While understandable, these issues can make having an effective conversation extremely difficult and can break the momentum in the sales cycle—especially if you’re forced to reschedule the meeting.



Solution 5:

Train sellers on the platform you’re using thoroughly and the best way to present themselves on screen. They can’t just open the app and wing it. Practice video pitching skills and be aware of home office backgrounds and lighting for a professional presentation.



Challenge 6: Rapport

Virtual selling isn’t as personal. It’s harder to build rapport when salespeople can’t read body language or feel the vibe in the room. Since customers buy based on emotion, and it’s easier to generate an emotional response in-person, making a deep connection with a prospect is a bigger lift when you’re physically distanced.



Solution 6:

Use pre-recorded video and content sharing tools before and after meetings to add depth and engagement as well as build trust and personal rapport with buyers. For example, instead of reps sending an email with a PDF attached, they can send a personalized video explaining the content they’re sharing and putting a face to the name.



Challenge 7: Culture

It's harder to pick up on the culture of a company when sellers can't meet with a prospect in person. Without the walk from the company's lobby to the prospect's desk, it's more difficult to gauge someone's prestige or see how they interact with others—factors that can be critical to an understanding of how an organization functions and how the buying cycle could be impacted.



Solution 7:

Show reps how to be more observant of what they can see on screen, including the prospect's background. Practice strong active listening skills, paying attention to word choice (positive, skeptical, fearful) and tonality to read intent.



Challenge 8: Prospect Meetings

Prospect meetings are more challenging for a number of reasons. Calls are truncated due to scheduling or technical issues, or people simply log in late. Sellers have less time for demos, and without proper prep time they can find it difficult to get through all their points, resulting in rushed calls. Time management and research skills are now more critical.



Solution 8:

To avoid rushing the call, sellers need to spend more time researching and preparing prospects ahead of time. Share information (pre-recorded video and collateral) before the meeting and come to the call ready to hit the ground running and make the most of the time.

Enhancing the Virtual Sales Cycle

Every sales cycle follows some variation of a pattern from prospecting through close. Virtual selling walks through these well-known steps. What's different today is that not only can you rely on the fundamentals, you can actually improve your performance at each stage by adopting a few new tactics, including live and pre-recorded video.

Check out the chart on the following page to learn how you can enhance each stage of the sales cycle by supplementing your current approach with the new techniques of virtual selling, especially live and pre-recorded video.



Sales Cycle Stage	Current Approach	Enhanced Virtual Selling [Current Approach + Video]
Coaching (All Stages)	Rep reports verbally on progress or manager listens to recorded calls at key points.	Practice/role play via live or pre-recorded video to develop strategy for every step of the process. Manager watches and leaves suggestions for next steps.
Prospecting: Cold or Warm Outreach	Contact prospect via email, social media, or phone.	Differentiate yourself by sending a personalized video message within your introductory email. Track activity on video/collateral to understand engagement and buying intent
Pre-Call/Meeting	Set up a time to meet face-to-face or on the phone. Hope they don't cancel at the last minute.	Before the meeting, prime the pump with video to introduce concepts and increase the likelihood the prospect will show up. Include a voiceover that explains why an asset will be helpful/valuable to the prospect.
Presentation	Meet via Skype, Zoom, Microsoft Teams, or other platforms. Worry that you won't get enough time if the prospect is running late.	Maximize the time you have with pre-meeting video and customized information that speaks to the company's situation. This will also help to build rapport, trust, and personalized engagement.
Follow Up	Send emails and drip content to stay on prospect's radar as the decision process is proceeding.	Recap your conversation, cover any missing points, and extend the meeting with personalized video. Embed content with an explanation of why you chose it for them to increase open/view rates.
Final Presentation and Negotiation	Gather a bigger group for yet another video call. How do you stand out from other vendors?	Practice and refine your final pitch on video prior to the meeting. Engage stakeholders before and after the meeting with video that anticipates questions and objections.
Close the Sale	Use a price quote tool or e-signing software.	Follow up with a thank you video.
Post Sale	Move on to the next deal.	Harvest intel from meeting recordings to inform other deals in progress and share insights with marketing, product strategy, and other teams for messaging, offerings, and positioning.
Customer Success Handoff	Communicate verbally with the customer team or share notes.	Share recorded video calls to help customer teams understand prospect challenges better for a smoother handoff.

Mastering Virtual Selling

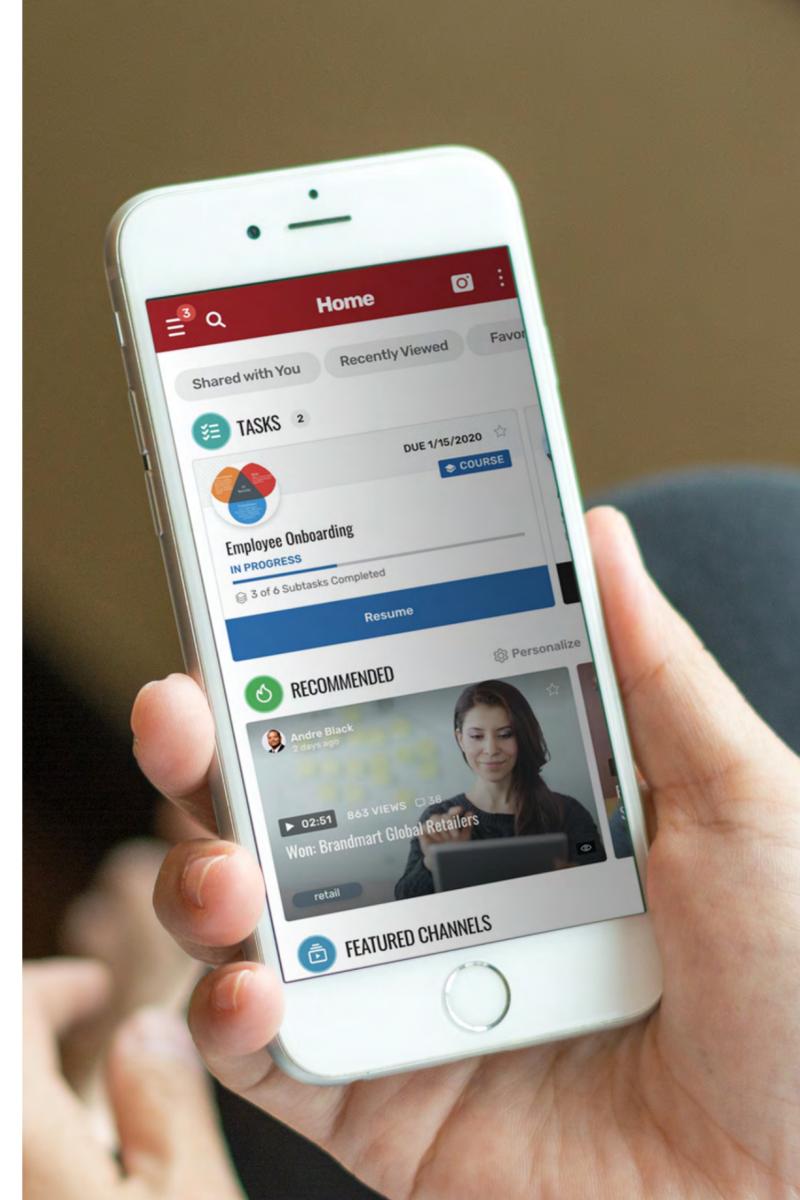
Technology and content are two components of successful virtual selling. With the right tech and the right content, sellers are equipped to win every deal.

Technology

Effective virtual selling depends on a full range of technologies: mobile, peer-to-peer networking, and live and recorded video. Live video conferencing tools can only take you so far. Virtual sales teams also need the ability to access key information while they're on the go, share best practices, and learn as they go from subject matter experts. Sellers need a way to do personalized outreach, record videos, manage content, and share collateral and videos with prospects. Sales managers must support sellers with tools to coach, review calls and presentations, and give feedback.

Content

The right technology must be paired with the right content. This is critical to ensure reps are armed to deliver the best information to each prospect, depending on their particular needs and pain points. Content creation can be an obstacle for rep success unless they're empowered to create and curate just-in-time content alongside formal marketing and product collateral. The most valuable content can be discovered, personalized, and delivered at the moment when it will have the greatest impact on your sales team. Tracking activity on this collateral allows you to understand engagement and buying intent for every prospect.



Empower sales reps to create and curate just-in-time content alongside formal marketing and product collateral.



Virtual Selling With Allego

Allego is built for dynamic learning, communication, content sharing, and collaboration anytime, anywhere. You can empower your organization with mobile, interactive technology built for the way today's virtual teams work—all through a single platform.

Create and share critical information. Collaborate one-to-one or one-to-many without the hassle of calendaring. Onboard faster, train more easily, and collaborate more effectively for bigger wins. Don't get left behind by relying on outdated training and enablement approaches. See how Allego helps teams master the new world of virtual selling.

More Productive Sales Presentations

- Accelerate learning about the virtual selling process
- Learn how to hold sales meeting via video conference
- Work as a team and collaborate on messaging, objections, etc.
- Augment your ability to demo by sending pre-recorded video before and/or after meetings

More Effective Coaching

- Enable more coaching and improve coaching effectiveness by reviewing seller recordings and providing specific point-in-time feedback
- Save time by sharing pre-recorded videos and asking for comments prior to meeting, then reviewing comments together

Enhanced Personalization and Differentiation

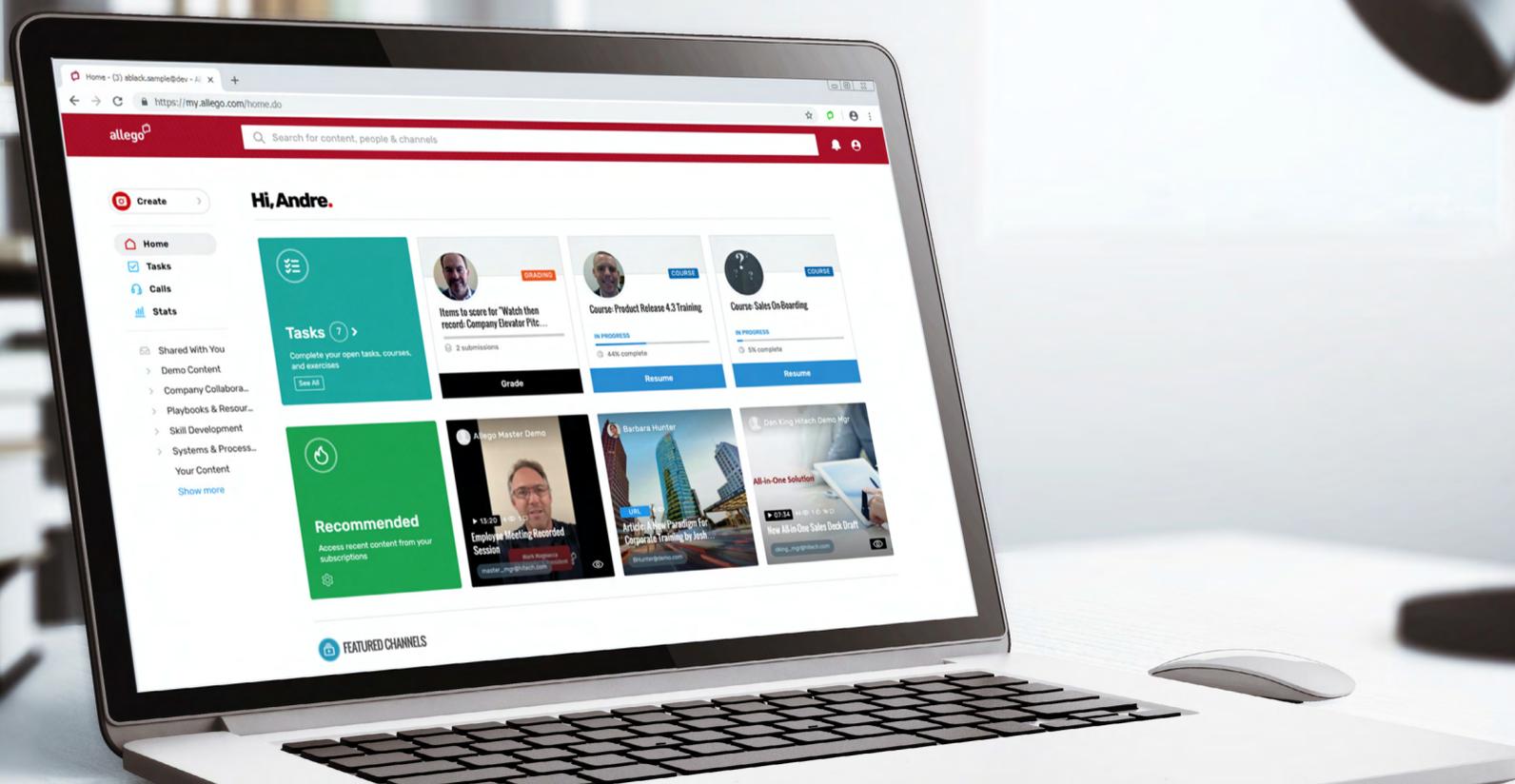
- Create one-off messages with asynchronous video
- Send personalized messages and share collateral with prospects
- Spark engagement with prospects who go dark
- Differentiate your solution from the competition

Greater Insight

- Track activity on video/collateral to understand engagement and buying intent
- See how many times a video is watched or content is opened/shared
- Gain visibility from watching videos/conversation intelligence

Smoother Post-Sale Handoff

- Harvest information to share prospect needs/status with customer success easily
- Capture intel for other deals in progress
- Use this information to inform marketing, product, or other strategy



Mastering virtual selling means investing in the tools your sellers need. You could cobble together multiple platforms with a range of capabilities, but the most efficient approach is having learning, content, and collaboration all in one place. When you implement a robust sales enablement platform, you save time and resources and gain the ability to scale across your organization.



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To learn how Allego can help you accelerate training and enablement in a world where in-person meetings are impossible, [request a demo today](#).

About Allego:

Transform your organization with mobile, interactive learning technology built for today's distributed teams. Allego's learning and enablement platform ensures that employees have the skills, knowledge, and content to accelerate team success. Instead of traditional onboarding and training approaches—which are rapidly outdated and quickly forgotten—hundreds of thousands of training, enablement, L&D, and customer-facing professionals use Allego to deliver the skills that employees need to succeed in today's dynamic business environment.