What is Deal Management? And how Outreach.io Manages It for Clients

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No deal is guaranteed for a sales team, even during the most stable times. The deal-making process is often a delicate balancing act, and sales teams need all the support they can get. Deal management helps sales teams determine the health of their pipelines faster, which enables them to achieve better outcomes more swiftly. Done right, it ensures a consistent, reliable framework for sales success.

As an Outreach reseller, 3D2B can now provide our clients with one of the most innovative automation tools sales teams can use to enhance deal management and improve execution in each stage of the sales cycle.

What is Deal Management?

Deal management refers to solutions that help organizations maximize profits, revenue, and market percentage by defining specified deal parameters like:

- Customer history
- Product significance
- Discount level
- Operational limitations

For instance, sales reps can use different visual indicators to quickly see how a proposed deal measures up to historical achievements.

A good deal management system tracks, maintains, analyzes, and prioritizes deals to present an overview of the sales pipeline. From customer interest to buying behavior, it processes all of a deal’s aspects and creates scenarios sales reps use to close more deals.

In short, it’s everything your team needs to get deals moving.

Focusing on the wrong priorities and acting on faulty insights can ruin sales team productivity and lead to lost deals that otherwise would have been won. However, when managers and sales reps have a clear view into a deal’s every facet, they no longer need to rely on impulse and can start using reliable data to make meaningful progress.

Outreach Guide is a powerful deal management solution that, among other things:

- Automates selling plans.
- Uses AI-generated insight to assist sales reps in real-time during sales meetings.
- Provides accurate visibility into the health of their pipelines.

Sales teams can use Outreach Guide’s built-in live conversation intelligence and best practice action plans to improve execution in each stage of the sales cycle. Thousands of major companies, including Adobe, DocuSign, and Okta, depend on Outreach's enterprise-scale and robust AI-powered innovation to power their revenue organizations.

Several new product enhancements make it even easier for sales teams to generate more pipeline, close more deals, and boost revenue visibility.

Forecast Flexibility

In today’s volatile economic environment, sales leaders and RevOps are always looking for ways to more confidently forecast risk and project sales numbers. With its custom filters, Outreach Commit delivers the insights your business needs to create a full range of pipeline reports. And with Scenario Planner, you can now apply even more pipeline filters to see how they might impact forecast outcomes.

Focused Meetings

Real-time conversation intelligence helps reps consistently improve the quality of sales calls. It quickly and accurately identifies data-driven actional insights, making it easier for teams to keep up with ever-changing information.

Outreach’s Kaia goes beyond standard analysis-based solutions to enable teams to capture AI-driven action items and reclaim time typically lost to tasks like onboarding. It can also increase rep performance by 30% by:

1. Tracking key moments to keep reps focused on the customer, not on note-taking.
2. Prompting reps to self-correct when they begin talking more than listening to customers.
3. Ensuring sales reps ask prospects and customers the right questions.
4. Using automated action item tracking and post-call meeting summaries to deliver on promises.

Enhanced Prospecting

The moment a call connects, Kaia for Outreach Voice gives your prospecting team the assistance it needs, equipping it with real-time content to help move conversations forward. AI-triggered content cards, the ability to track key moments with notes and bookmarks, and insights into how calls go give teams the confidence they need to face tough prospect questions.

Is Outreach Right for You?

It’s no secret that good deal management is the foundation of sales success. But without the right processes and tools, your sales team can struggle when dealing with the inefficiencies and complexities that so often occur while managing pipeline deals.

The Outreach sales execution platform is the first to deliver engagement, revenue operations, and intelligence in one comprehensive platform. With its Deal Health Score, real-time assistance, and automated best practices, it creates a single execution system that helps revenue organizations operate at their full potential.

Thanks to the platform’s machine-learning models, reps always know where their customers and clients are in their buying journeys, including when and how they engage. Marketing and sales teams are aligned and organizations can deliver efficient, predictable growth.

Outreach is a valuable tool for anyone involved in sales, including development and closing reps, customer success managers, and sales management and leadership. It can help your organization substantially improve sales team productivity and drive smarter engagement with prospects and customers.

Book a consultation with 3D2B today to to learn more and discuss how Outreach can deliver everything you need to build a better deal management program.

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