

# How To Improve Your Sales Process To Unlock New Revenue Growth

ONTASK The logo for ONTASK features the word "ONTASK" in a dark blue, sans-serif font. To the right of the text is a green checkmark icon that is integrated into the letter "K".



Personal Question of the Hour:

Are you **leaving revenue on the table**  
by not automating your sales process?

## The U.S. will be hit worse by job automation than other major economies

A new study from PwC estimates that 38 percent of U.S. jobs could be lost to automation in the next 15 years.

By [April Glaser](#) | [@aprilaser](#) | Mar 25, 2017, 6:00am EDT

## Automation threatens 800 million jobs, but technology could still save us, says report

*New analysis says governments need to act now to help a labor force in flux*

By [James Vincent](#) | [@jvincent](#) | Nov 30, 2017, 10:31am EST

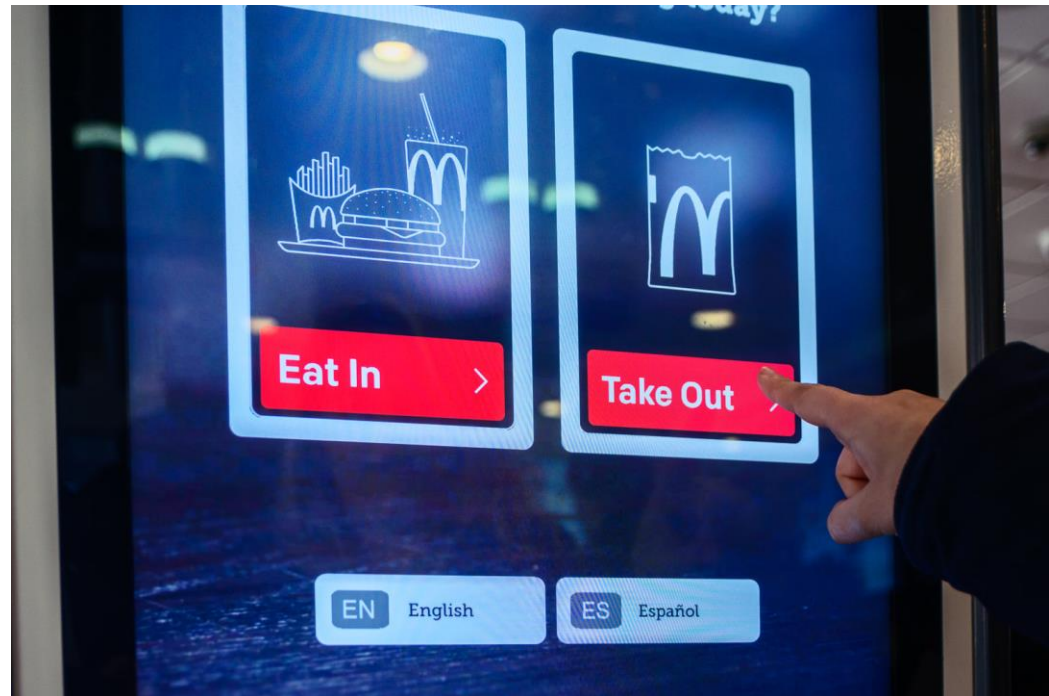
## Unsettling New Statistics Reveal Just How Quickly Robots Can Replace Human Workers

They're coming.

MIKE MCRAE 31 MAR 2017

# “73% of food prep and service activities are automatable already.”

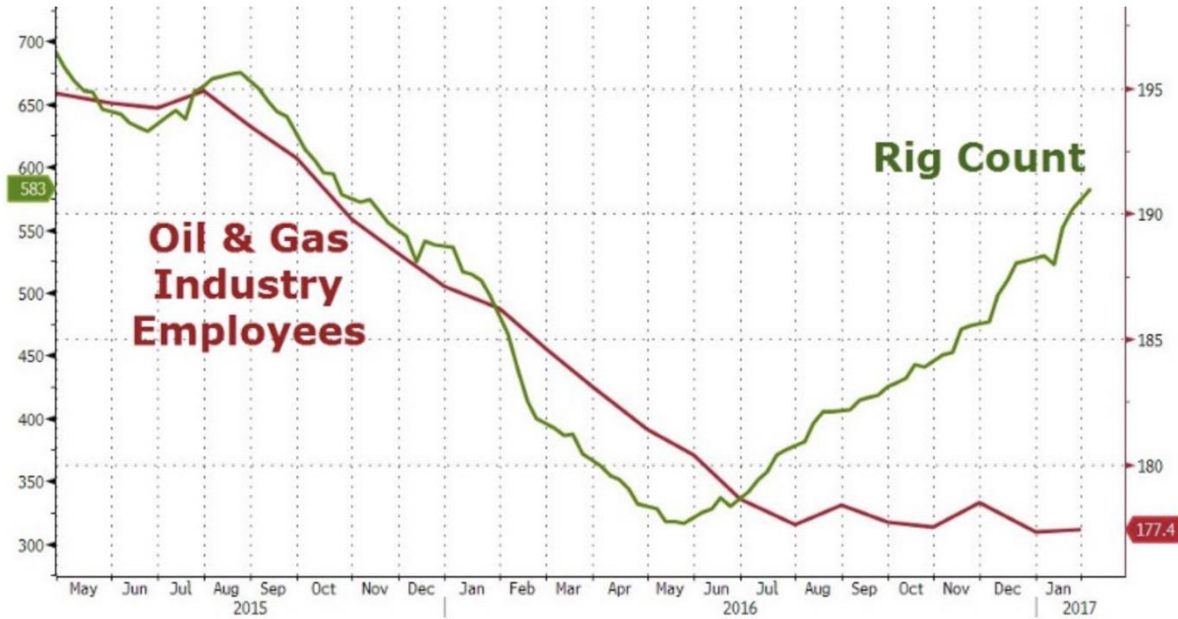
Automation is sweeping the quick-service industry, with digital kiosks and mobile ordering apps being introduced at major chains like McDonald's, Starbucks, and Panera.



**“80% of heavy and tractor-trailer truck-driving jobs could disappear because of automation.”**



“It’s expected that what once took a crew of 20 will soon take a crew of 5.”



Source: [ZeroHedge](#)

And it's not just blue collar jobs at risk...

“Truck drivers are one thing and Google as well as Tesla have a great head-start in disrupting that market...

**But lawyers, doctors, teachers, customer service and sales reps** – there are companies that are **turning these professions into lines of code**, and they're going to make *a lot* of money.”



- Keith Rabois of Khosla Ventures  
*(early investor in PayPal, LinkedIn, Square, YouTube,  
Yammer, Palantir, Lyft, and Airbnb)*



**“About 40% of traditional sales functions  
can be automated today.”**

“With technological advancements in natural language processing, **this can reach 50% or higher**, with human interaction providing value for our customers.”

- McKinsey Global Institute

**“40-50% of customer service tasks  
are ripe for automation today.”**

**“An automation tsunami is upon us that will leave tens of millions of workers stranded, with curtailed employment prospects... a hereditary shockwave of economic hardship that could be felt for generations.”**

- Rob LoCascio, CEO of LivePerson

# Chatbot Invasion

**More than 100,000 bots are being used at Facebook Messenger now**, affording their business to contact consumers in real-time.

- 2018 Chatbot Global Trends Report





Companies that have already started automating parts of their sales process are seeing:

**50% increase in leads**

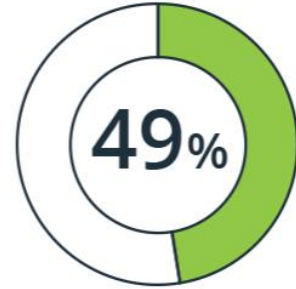
**Cost reductions of 40-60%**

**Reducing call times by 60-70%**

- Harvard Business Review

# Why automate your sales activities?

- Eliminate tasks getting in the way of new revenue
- Visibility into the quote and contract processes
- More accurate lead and sales pipelines
- Eliminate errors and missing data



49% of salespeople cited spending time on administrative tasks as the biggest challenge to their productivity in 2017.

# So if it's beneficial, why aren't companies adapting?

- “We've always done it this way”
- Tactical gets in the way of strategic
- Tools and implementation are expensive
- Hard to quantify the opportunity







**Personal Story:**  
The Red Folder Process

# Accusoft - Tampa, FL

- 27 year track record
- Document imaging & automation
- 1000's of customers
- 180 Employees



# The Old Way



# The Old Way



We knew we needed a better process...

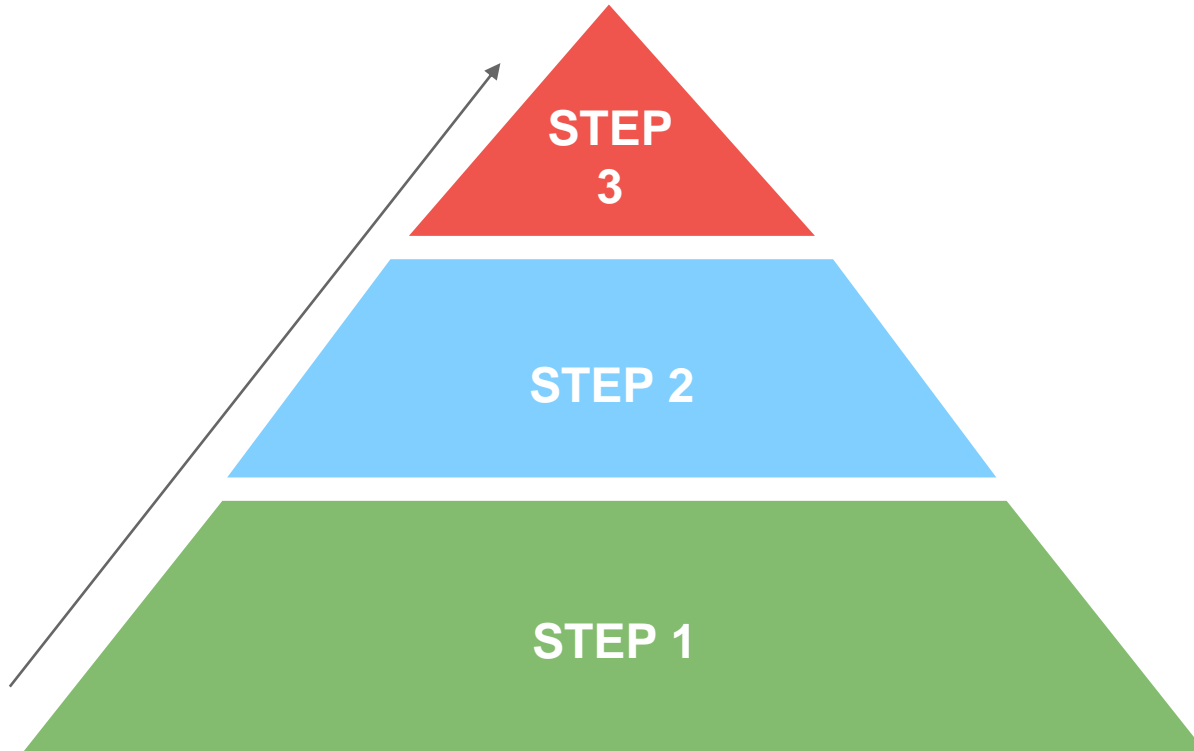


# Digital Transformation - Not that simple!



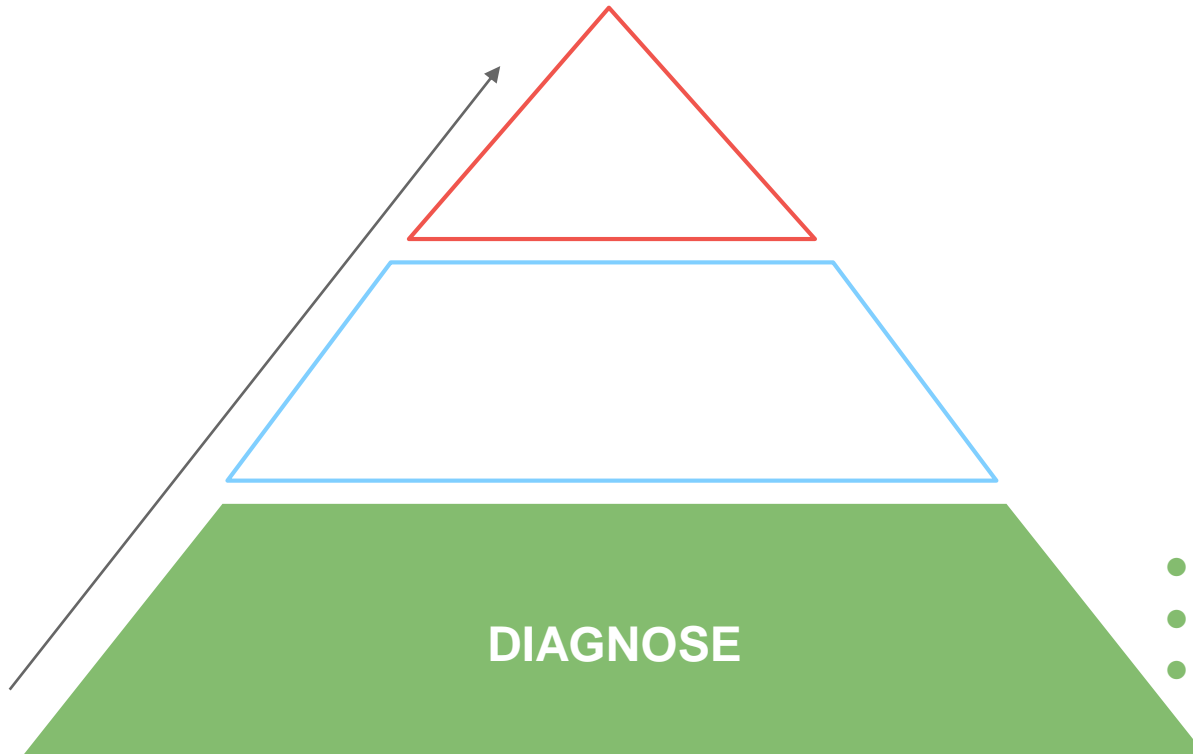
So where do you start?

# 3-Step Framework for Adopting Automation



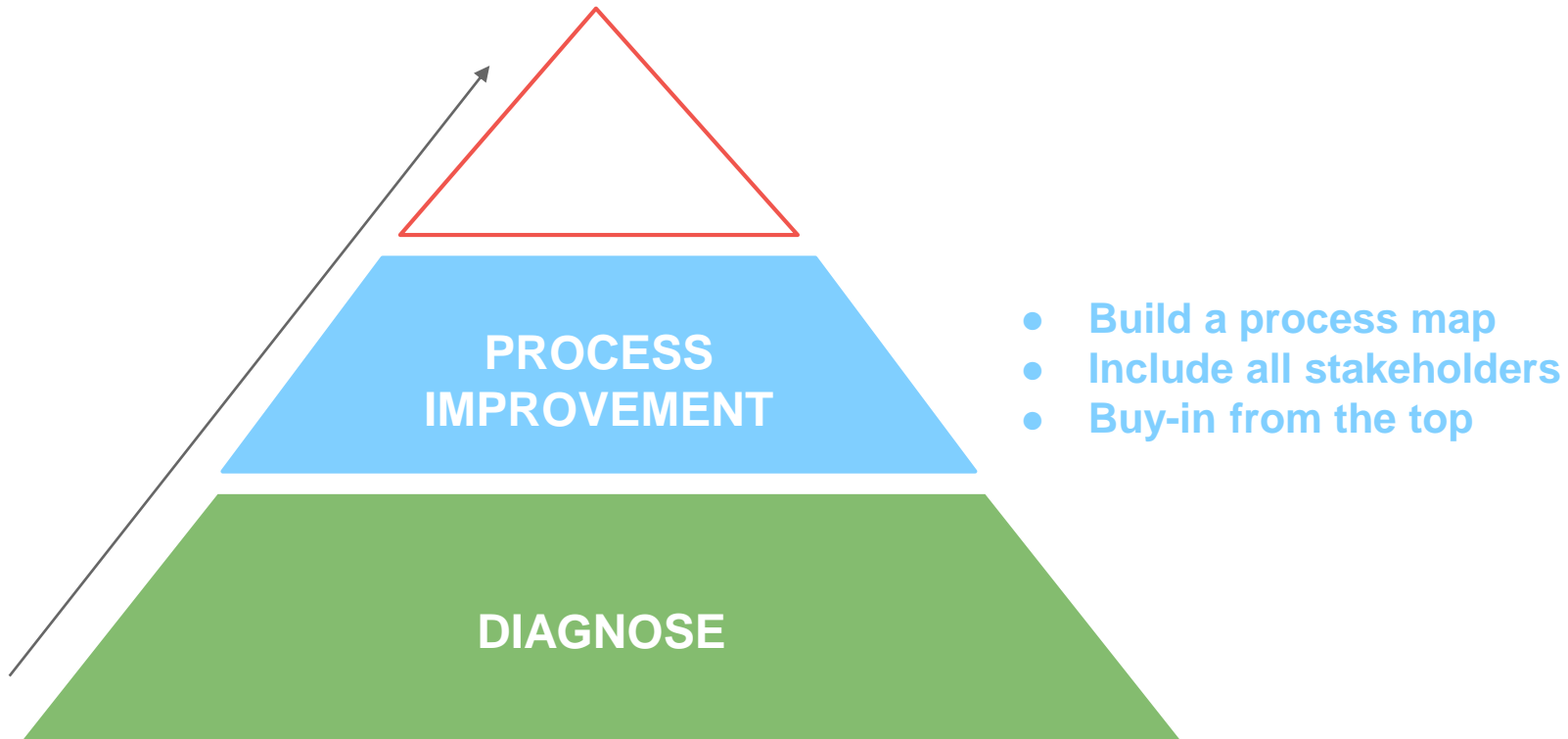


# 3-Step Framework for Adopting Automation

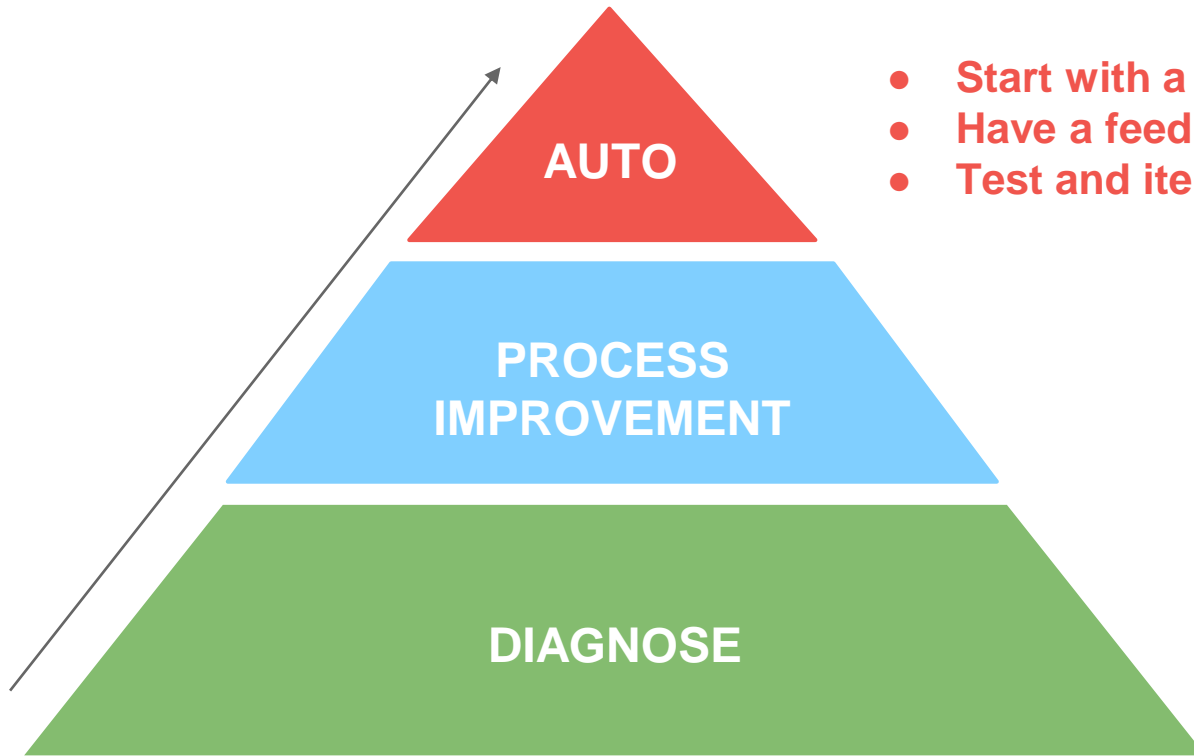


- Identify highest impact area
- Use data to decide
- Understand the root cause

# 3-Step Framework for Adopting Automation

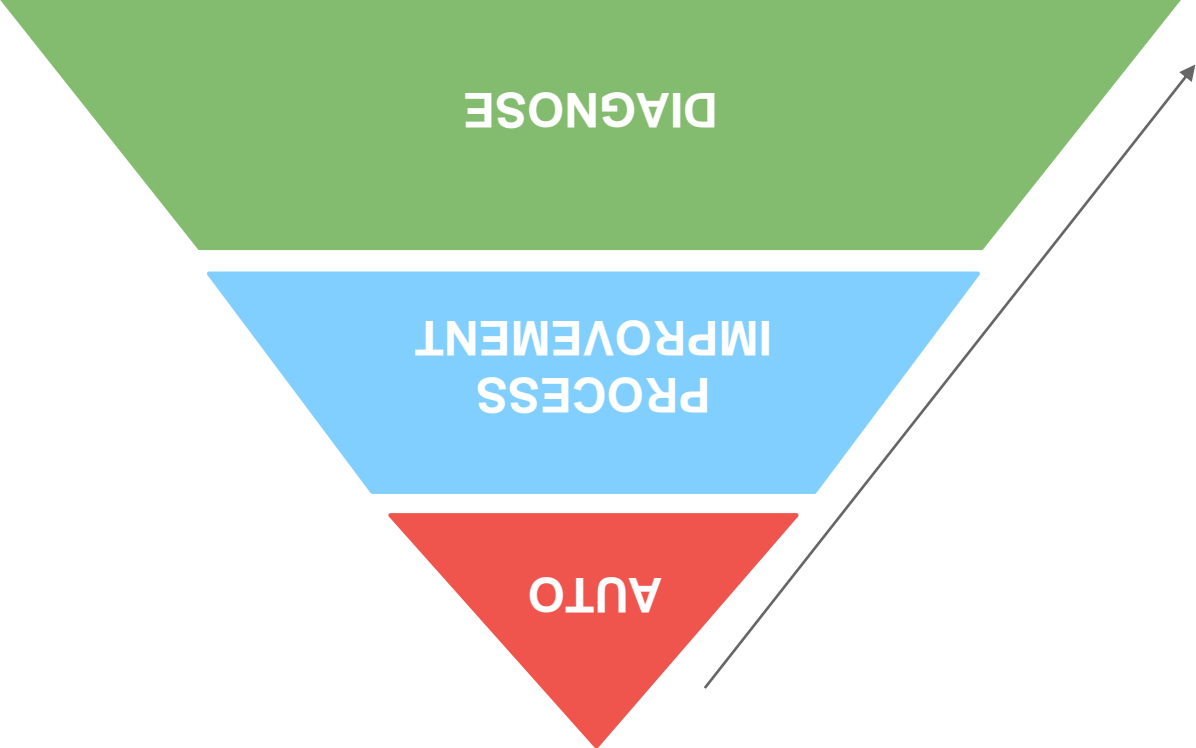


# 3-Step Framework for Adopting Automation



- Start with a piece of the process
- Have a feedback system
- Test and iterate quickly

# Don't Start With Automation



# Negative Consequences of Inverting

- Assume we understand the existing process
- Target users aren't bought in
- Iteration and change requests are expensive

# The Results

# Before

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- Manual document generation
- Manual follow up and email tracking
- Up to 3 week average
- 30% time spent on new business
- Not able to delegate tasks

# After

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- Automatic quote/contract generation
- Automated reminders and tracking
- Same day/week turnaround
- 70% spent on new business
- Ability to delegate renewals to new team of account managers

# The 7 Immutable Laws of Adopting Automation

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1. Use data to make decisions.
2. Don't assume everyone agrees on the process.
3. It has to create value for end-users and executives.
4. Don't try to tackle the entire sales process.
5. It will take longer than you think, so plan accordingly.
6. The ROI is real, but will not be immediate.
7. People will always be your greatest asset.



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# Questions?

Schedule a discovery call today to learn how OnTask can streamline your sales process.

[learn.ontask.io/selling-power-webinar-2018](https://learn.ontask.io/selling-power-webinar-2018)



**Steve Wilson**  
VP Product, Accusoft

