

The Game-Changing Power of Data Sharing for Sales Teams

9 BEST PRACTICES TO GET YOUR TEAM SHARING
INFORMATION FROM THE FIELD

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INTRODUCTION

The **game-changing power** of data sharing

According to Gartner, **sharing data generates 3x more economic benefit** than simply collecting it. Their analysts suggest it is a key competitive differentiator; businesses that enable inter-enterprise data sharing will outperform those that don't by 2023.¹ It's why sales teams are constantly asked to share more information:

- Marketing wants to hear positive quotes and successes.
- Product leaders want to know product gaps and feedback.
- Operations wants to understand the bottlenecks.
- Corporate strategy wants competitive intelligence.
- Sales leaders want to anticipate risks and seize opportunities.

While businesses collect more data than ever, sharing data is still highly manual. It happens through one-on-ones, meetings, spreadsheets, emails, texts, phone calls, channels, surveys, and more.

What's been lacking is a way to simplify sharing — until Groopit. Read on to learn about the nine best practices for data sharing and the Groopit solution.

GARTNER ASSERTS THAT DATA SHARING BOOSTS BUSINESS OUTCOMES AND PREDICTS THAT:

“By 2023, organizations that promote data sharing will **outperform their peers** on most business value metrics.”

About the Author: Tammy Savage, CEO & Co-founder of Groopit, led strategic initiatives at Microsoft for 23 years. She knows that intelligence from frontline employees is valuable, important, and often very hard to get. But it doesn't have to be. Savage is obsessed with helping leaders accelerate results with real-time data from the frontline. Out of that obsession, Groopit was born.

¹ <https://www.gartner.com/smarterwithgartner/data-sharing-is-a-business-necessity-to-accelerate-digital-business>

INTRODUCTION

A model for **success**

Let's look at a completely unrelated example of complexity: Traffic. Drivers are the multitude of decision makers. They're driving their own routes, making independent and unpredictable decisions, simultaneously. Traffic is constantly changing and outsmarting it is complex.

Waze (yes, the traffic navigation app!) established a completely new, game-changing approach.

- 1 First, **Waze defined the data** drivers should share: traffic jams, police sightings, accidents, and hazards.
- 2 Second, **Waze made data sharing automatic** so every driver could immediately see what's happening and use the data to make decisions.

As a result, drivers are able to outsmart traffic. They're empowered with data that is highly accurate because it is well defined, collected in real-time and highly valuable because it is immediately shared with all drivers.



Avoiding the traditional **pitfall**

Imagine if information about traffic was shared by email, spreadsheets, surveys, texts, or meetings. Data would be everywhere and nowhere. Drivers couldn't access the information and outsmarting traffic would be impossible.

Now think of how data is shared across your organization. Where does shared data reside? **Check all that apply:**

- Meetings
- Email
- Slack channels
- Teams channels
- Shared spreadsheets
- Instant messaging conversations
- Text messages
- Surveys or forms
- CRM systems
- Other

If your organization is like most, data is everywhere and nowhere, lost and late, forgotten and underutilized. It's the traditional pitfall. There just hasn't been a better way — until now.

That's where our 9 best practices can help. [Let's dive in.](#)





Best Practices

These **9 best practices** will help you tap into the game-changing power of data sharing, to solve your most important problems.

Articulate it

Articulate the business problem you want to solve.

Perhaps you're trying to double revenue growth, accelerate new product conversions, become the number two service provider, rebuild your marketplace presence, or outsmart the competition.

Every decision you and your team make about data sharing from this point forward should be made with the articulated goal in mind.

WHAT PROBLEM ARE YOU WORKING TOGETHER TO SOLVE?

Double revenue growth

Accelerate product conversion

Deliver top service across providers

Launch our new market presence

Outsmart the competition























































Define it

Define exactly what data people should share.

Define 3-5 data sharing actions that show what's working, what's not working, and what's happening in the field. Defining it will remove guesswork so employees don't waste time figuring out what information is important.

Once you've defined it, go one level deeper. For example, sharing a field site visit to illuminate what's happening in the field may be defined as sharing location, photos, #active promotions, and identifying sell-through barriers.

Groopit makes it easy to define data sharing. Choose from dozens of templates or create a *Groopit Action* from scratch. Here are examples to inspire you.

 Field Site Visit	=	 LOCATION	+	 PHOTOS	+	 #ACTIVE PROMOS	+	 SELL-THROUGH BARRIERS		
 Client Churn Risk	=	 RISK LEVEL	+	 REACTION	+	 TARGET RENEWAL DATE	+	 SUMMARY		
 Deal Slow-Down	=	 TYPE	+	 TIME LOST	+	 PAIN LEVEL	+	 SUMMARY		
 Sales Challenge Ahead	=	 TYPE	+	 STAGE	+	 SUMMARY				
 Competitor Products	=	 PHOTOS	+	 SKU	+	 PRICE	+	 PRODUCT	+	 COMPETITOR
 Product Gaps	=	 GAP	+	 QUOTE	+	 IMPORTANCE	+	 SOURCE		
 Sales Resource Needed	=	 TYPE	+	 FOR	+	 SUMMARY	+	 EXAMPLE		
 New Product Offer Reaction	=	 ACTIVITY	+	 REACTION	+	 PROSPECT	+	 NEXT STEPS		
 Positive Customer Quote	=	 QUOTE	+	 SOURCE	+	 TOPIC				
 Customer Success	=	 MILESTONE	+	 DATE	+	 SUMMARY				
 Wins	=	 ACCOUNT	+	 LOGO	+	 TYPE OF WIN	+	 REVENUE	+	 KUDOS

Quote it

Whenever information might be considered bad news for your company, gather it in the form of a **quote**.

You have good information, but it's not good news. That's when capturing it with a quote is critical.

Chances are, you've lost out on quality intel because employees don't want to be the bearer of bad news. Gathering bad news by passing along a quote changes the dynamic: allowing you to gather information that is valuable to multiple teams across your business — from marketing to product development, sales to account management.

WHEN EMPLOYEES MUST SHARE THEIR PERSPECTIVE:

Mayfield's factory automation solution is faster than ours.



WHEN EMPLOYEES GET TO PASS ALONG A QUOTE:

A prospect just said,
"Mayfield's factory
automation solution
**delivers faster
processing speeds.**"



Score it

Score it to turn anecdotes into quantifiable data.

Turning anecdotes into quantifiable data is a valuable asset to use in the decision-making process.

In this example, the product gap is processing speed. The number of times this gap is raised during the sales process will provide quantifiable data. By assigning information tags like #ProcessingSpeed, you can count frequency.

Then, by using a four-point scale, you can also capture importance or sentiment. In this example, we want to capture the importance of a product gap or perceived gap to a prospect's decision-making process.

When it comes time to make a business case, you'll know that processing speed was raised 123 times and 83% considered it important or very important in their purchasing decision.

With these two additions — frequency and importance — an anecdote has become quantifiable data.

Product Gap

Quote: "Mayfield's factory automation solution delivers faster processing speeds."

Source: Prospect

Topic: #Product Gap Type

Importance:

4 Very Important

3 Important

2 Somewhat Important

1 Not Important

Time it

Streamline the process to take less than one minute.

The goal is to make sharing so fast and easy it can be done in-the-moment.

How? We take our definitions and put them to use in Groopit. Set up Groopit so data can be entered with a tap or a click. In this example, source, gap, and importance are all choices. The only thing left is to type the quote.

When you make sharing take less than a minute, people can do it in the moment. Whether it's right when they hear it or in between meetings, people can share in real-time.

The result? More accurate information, shared more often.

Product Gap

Quote: "Mayfield's factory automation solution delivers faster processing speeds."

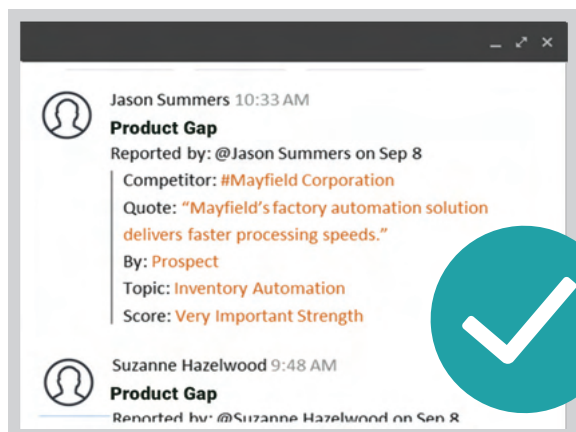
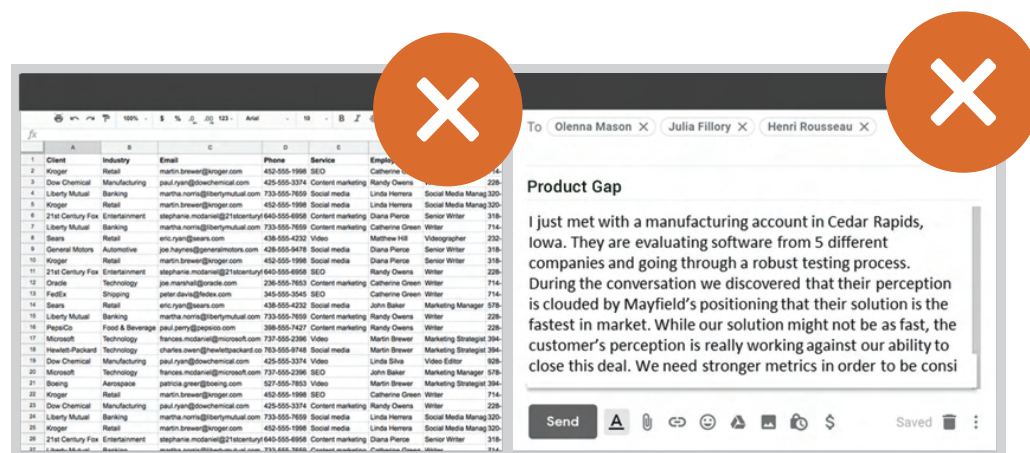
Source:	Choose one ^
Gap: #Pr	Prospect
	Partner
Importan	Client

Share it

Share it automatically and in a lightweight, consumable format.

The biggest mistake companies make is letting information disappear into a black hole. Too often, it's only seen when someone analyzes the disparate information and publishes the occasional summary.

To be successful, data must be consumable. Long email narratives take too much time to read. Sharing data in a spreadsheet is too hard to consume cell by cell.



Ideally, share it in a data-oriented, feed format. It's scannable, consumable, and lightweight. The example on the left was created with the Groopit Slack App.

The result? Everyone in your organization will consume, learn, and use real-time data to inform their decisions. It's a powerful complement to aggregate data and analysis.

Model it

Enlist champions to **model** quality sharing and encourage their peers to do the same.

Find champions across your business. You may have 2 or 102. The key is to choose people from different teams, disciplines, and locations. Their responsibility is to model good sharing and encourage their peers to capture it too.



Recognize it

Recognize the value of the data and the people contributing to it.

When employees contribute information, celebrate it. People need to know what they're sharing is valued. That takes reminders. The key is to keep it simple and enlist others to help. Then, recognize it in big and small ways.

- 1 Acknowledge contributions — it can be as quick as adding an emoji.
- 2 Celebrate wins — whether that's winning new business, expanding existing business, anything that reflects progress against your core KPIs.
- 3 Tell people when shared data influences decisions — the new marketing campaign, an upcoming pricing review, a product decision — anything informed by shared data.

You're helping people be part of something bigger and something that works: data sharing yields results.



It's the fuel that will keep your **competitive intelligence** engine running.

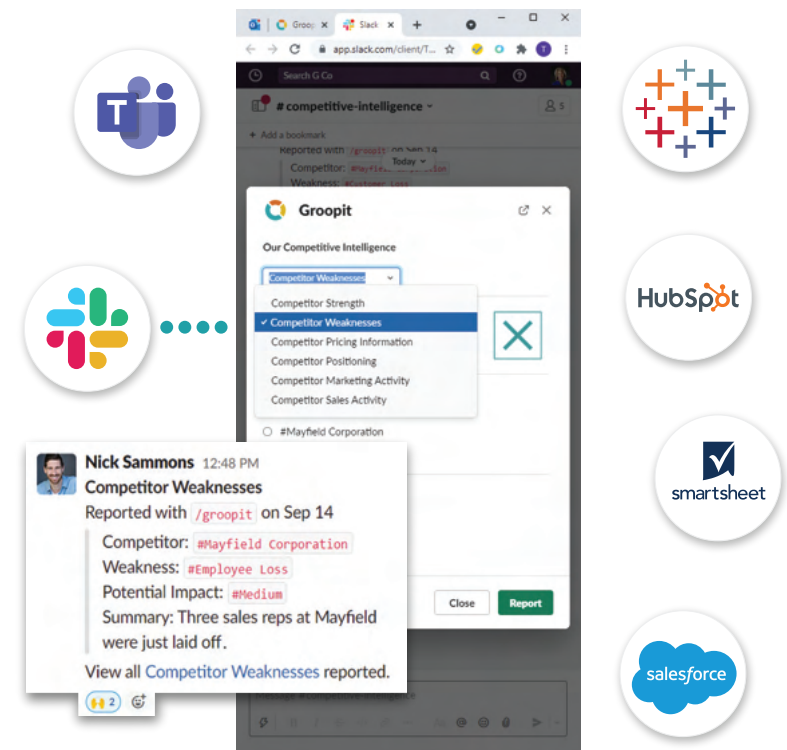
Integrate it

Integrate data shared into existing workflows.

Groopit makes data sharing easy by adding workflow integrations.

If your team primarily works in Slack, Microsoft Teams, or Salesforce, use Groopit integrations to make the workflow seamless. Groopit for Slack and Groopit for Teams allows data to be shared with just a few taps from within a channel or workspace. Groopit for Salesforce allows a sales executive to capture data in Salesforce and share data at the same time. Groopit's data integration API allows data to automatically integrate into systems like Tableau, Zendesk, and more.

The result? The right information, shared more often.

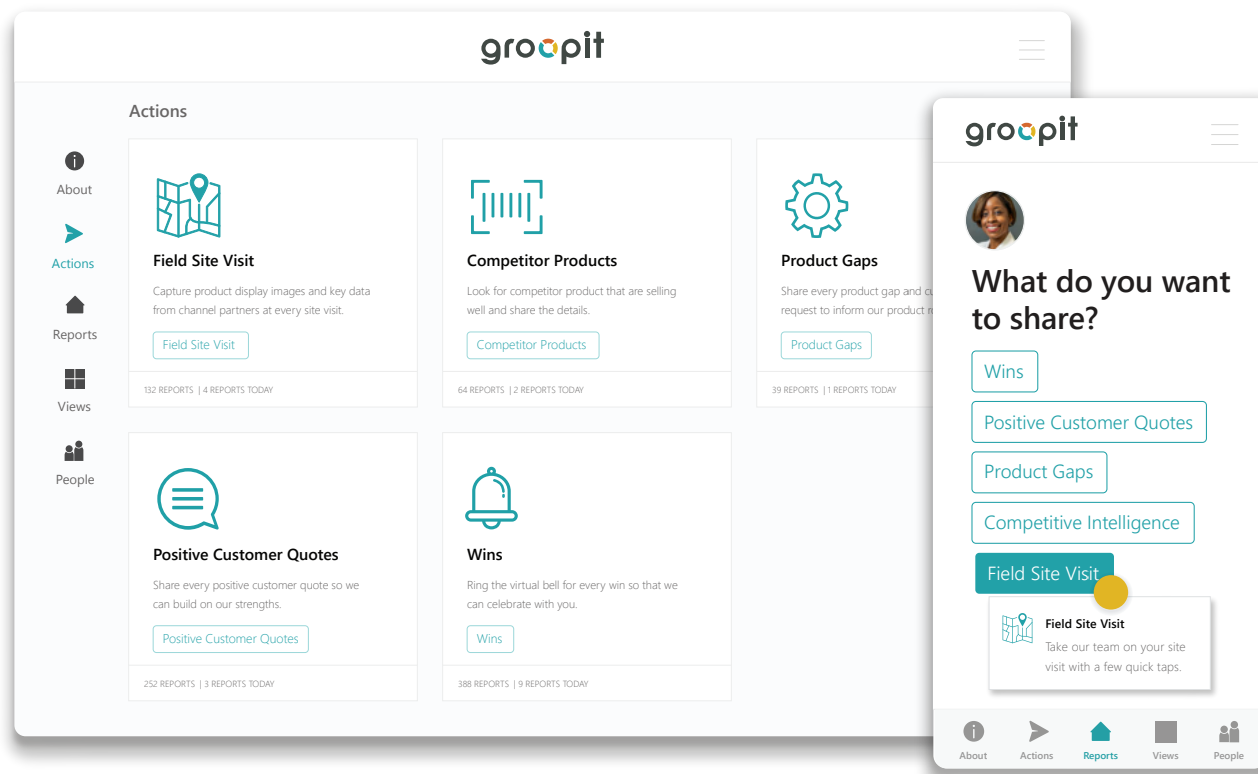


How to implement the 9 best practices with **groopit**











Groopit is the ultimate way to get, share, and use data from your frontline — like data from the field. It was designed with the 9 best practices in mind. [Here's how it works.](#)

Define the data to share from the field with **Groopit Actions**

Actions are completely customizable for your organization.



Get started by choosing from a library of **Groopit Actions**

 <p>Field Site Visits Share a quick summary at every site visit.</p> <p>Field Site Visits</p>	 <p>Client Churn Risks Surface any client at risk of churning so we can work together to prevent loss.</p> <p>Client Churn Risks</p>	 <p>Deal Slow-Downs Share whenever internal processes slow down a deal so we can quantify opportunities for improvement.</p> <p>Deal Slow-Downs</p>	 <p>Sales Challenges Whenever you see challenge emerging in the sales process, raise it so we have line of sight on challenges to overcome.</p> <p>Deal Slow-Downs</p>	 <p>Competitor Products Look for competitor products that are selling well and share the details.</p> <p>Competitor Products</p>
 <p>Product Gaps Share every product gap raised by prospects and customers to inform our product roadmap.</p> <p>Product Gaps</p>	 <p>New Product Offer Reactions As you introduce new product and offers to customers, share their reactions.</p> <p>New Product Offer Reactions</p>	 <p>Positive Customer Quotes Share every positive quote so we can build on our strengths.</p> <p>Positive Customer Quotes</p>	 <p>Customer Successes Share customer successes whenever you hear of them.</p> <p>Customer Successes</p>	 <p>Wins Ring the virtual bell every time you win business.</p> <p>Wins</p>

+more

Make it easy to capture data in **3 taps** and less than one minute with Groopit

In this example, employees capture a product gap. They enter a **quote** and who said it, select the type of product gap — in this case, processing speed — and then **score it**.

The image shows a mobile app interface for Groopit. At the top, the Groopit logo is visible. Below it, a gear icon is labeled "Product Gap" with the subtitle "Share every product gap and customer request to inform our product roadmap." A blue arrow icon is labeled "Quote about Product Gap". Below this, a text box contains the quote: "Mayfield's factory automation solution delivers faster processing speeds." Underneath, a "Quoted by" section has three buttons: "Partner", "Client", and "Prospect", with a plus icon to the right. The "Product Gap Type" section has a button labeled "Processing Speed". The "Expressed as" section has four buttons: "Extremely Important", "Important", "Somewhat Important", and "Not Important". At the bottom, there is a navigation bar with icons for "About", "Actions", "Reports", "Views", and "People".

In this example, employees capture a field site visit. They share location, display photos, **#active** in-store promotions, and identify sell-through barriers.

The image shows a mobile app interface for Groopit. At the top, the Groopit logo is visible. Below it, a header section is labeled "Field Site Visit" with a user profile picture and the name "Matthew" and "2 min ago". Below this, an "Account" section has a button labeled "#Mayfield Corporation". The "Site Type" section has a button labeled "Processing Facility". The "Site Location" section shows a map with a red location pin and the label "Seattle". The "Site Image" section shows a photo of a factory interior. At the bottom, there is a navigation bar with icons for "About", "Actions", "Reports", "Views", and "People".

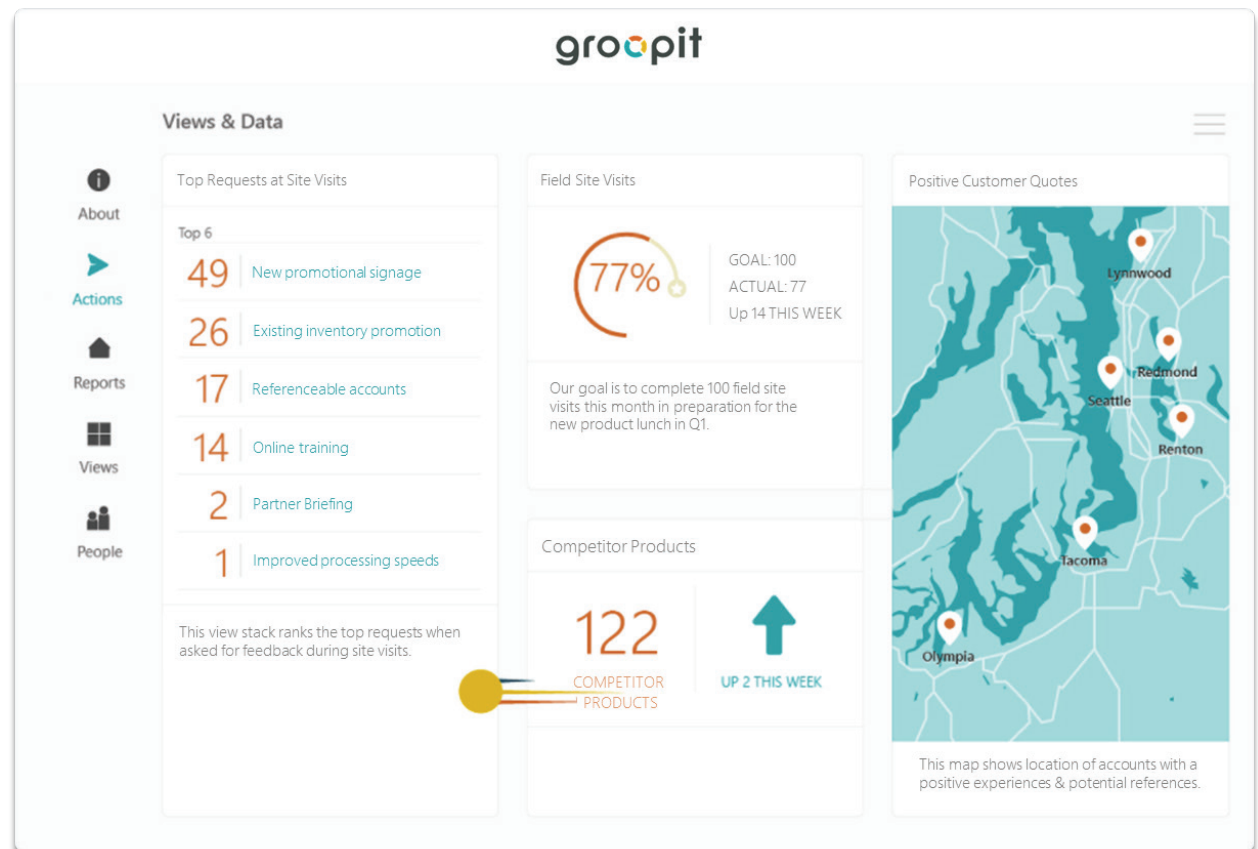
In less than a minute (**time it!**) and just a few taps, the information is captured.

Groopit automatically **shares it** with everyone involved. Team members **model** contributions and can **recognize it** right here too with that celebratory emoji.

Empower everyone involved with Groopit by **sharing data** in real time

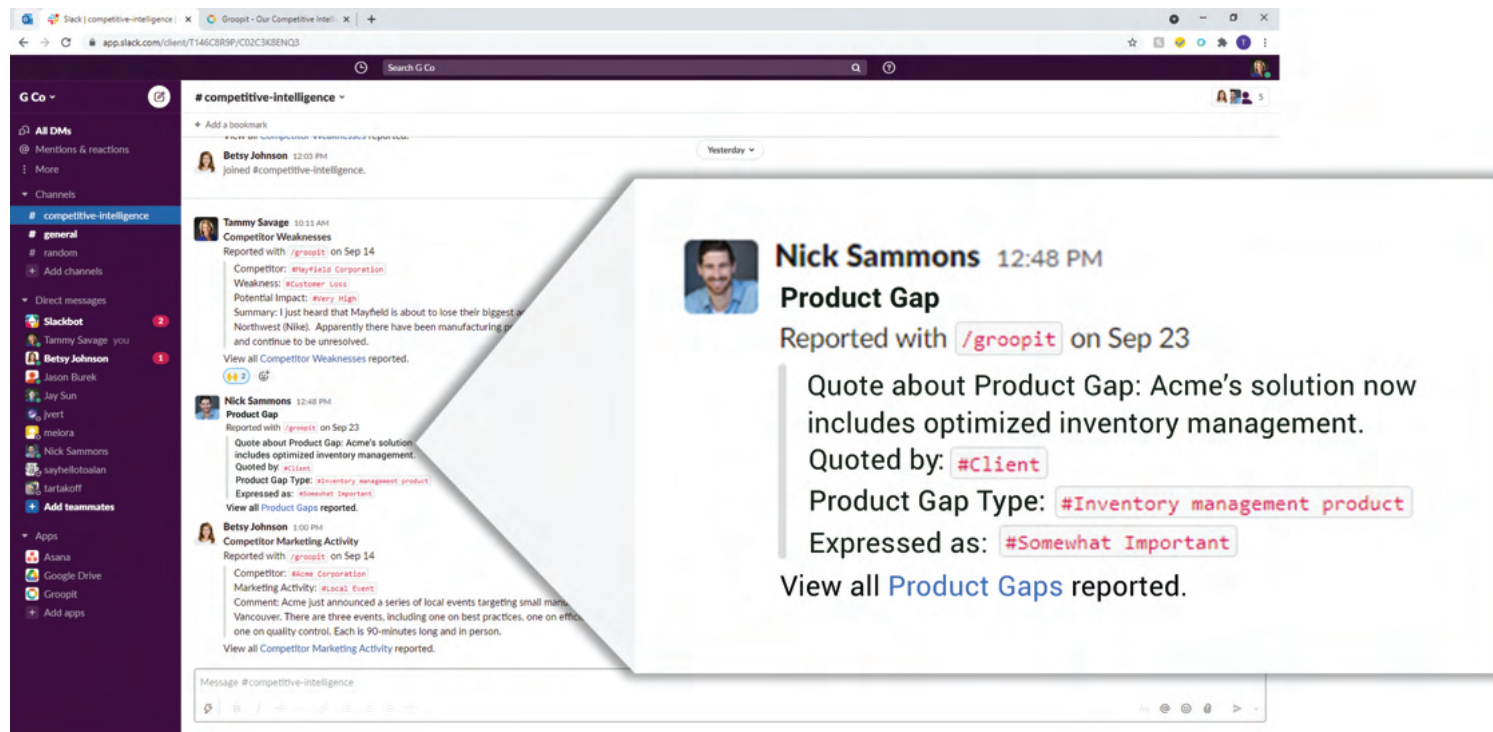
Groopit automatically shares the information with everyone involved and in a digestible format.

- ✓ Read each contribution
- ✓ View aggregate data
- ✓ Search the data



Integrate Groopit data into Slack, Salesforce, and more

With Groopit, everyone involved is in the know and empowered to make decisions informed by frontline employees.



**Groopit is the ultimate way to get, share,
and use data from your frontline.**

Want to learn more?

Visit <https://groopit.co/solutions/field-sales-solution/>

or reach out to us at hello@groopit.co

and we'll show you how Groopit can work for you.

Articulate it

Define it

Quote it

Score it

Time it

Share it

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Integrate it

groopit.co



The background of the entire page is a vibrant teal color. In the center, there is a large, intricate circular pattern composed of many concentric rings. Each ring is made up of small, rectangular blocks in shades of teal, orange, and yellow, creating a complex, mosaic-like effect. Scattered throughout the teal background are numerous small, irregular shapes in the same color palette, giving the impression of confetti or digital particles.

groopit