TRANSFORMING HOW SALES TEAMS WORK TOGETHER
QUIP FOR SALESFORCE
Consider the range of CIO responsibilities: Does sales productivity make the list? It should, as the decisions related to tools and processes can have a profound impact on sales and revenue. It starts with the tools teams work with every day. The typical employee toolkit includes email, an office suite, chat, CRM and other line-of-business applications, and perhaps one or two industry-specific niche tools. This common scenario can easily lead to information and application overload, creating a chaotic work environment that undermines sales productivity. Sales team members spend more time navigating the flood of messages, files, and meetings—all requiring constant switching between multiple tools—than actually selling.

Enter Quip, a new type of productivity tool that brings together documents, CRM data, and communication in a single platform. Now available inside the Salesforce CRM, Quip for Salesforce offers a seamless collaboration experience where content and conversations take place together alongside live data. With everything in one place, there's no need to switch constantly between multiple applications, so context is never lost, and decisions and action happen faster. Quip is the productivity tool of choice for companies as diverse as Amazon, Facebook, Amgen, Citi, and 21st Century Fox.

“With Quip for Salesforce, sales teams can collaborate on living account plans, customer meeting notes, and win/close plans without ever leaving CRM,” says Alan Lepofsky, Vice President of Evangelism at Quip. “Similarly, service organizations can use Quip's case swarming templates to resolve complex cases much faster than old-fashioned tiered-support processes.” Before joining Salesforce, Lepofsky spent years as a Principal Analyst at Constellation Research, where his primary research area was the integration of collaboration and business processes. “By bringing together Salesforce records and Quip documents in a seamless experience, employees are able to make decisions faster.”
20 MOST PROMISING
SALES TECH
SOLUTION PROVIDERS - 2019

Steven Branch, President & CEO

Alan Lepofsky, VP of Evangelism
Quip was founded in 2013 by Bret Taylor, co-creator of Google Maps and former Facebook CTO, and Kevin Gibbs, co-creator of Google App Engine. Their vision was to bring efficiency to the way people create and share information. They founded Quip to modernize the authoring and sharing of content, and in the process redefine the old perception of what a document actually is. Quip documents are more like collaborative workspaces, where multiple types of content can be brought together on the same screen. For example, a spreadsheet doesn't have to be its own file; rather it can be part of another document, which might also contain images, checklists, project trackers, kanban boards, and live CRM data. Conversations about the content stay in the document, whether about the entire document, or linked to a specific section, word, image, or spreadsheet cell.

After Salesforce acquired Quip in 2016, the company deeply integrated Quip and Salesforce's CRM solution, making it easy to add live Salesforce data to Quip documents, and embedding Quip's productivity solution directly in CRM with Quip for Salesforce. As a result, teams can coordinate and collaborate on business processes in more effective ways.

**COLLABORATION WITH A PURPOSE**

To enable successful sales teams, smart CIOs are going beyond just choosing tools, and are evolving the processes used throughout the entire sales life cycle. A fundamental part of this change is understanding the shift to collaborative selling. Sales has gone from being a one-on-one engagement to a team sport, with more stakeholders weighing in on the deal, and everyone working in harmony to meet increasingly high customer expectations. At the same time, the pace of sales has accelerated and customers are demanding interaction across a larger variety of channels. Traditional tools, tactics, and processes can’t keep up with the new pace of business. Collaborative selling solves this, aligning teams and pushing more deals over the finish line. According to the Second Annual State of Sales Report from Salesforce Research, 60% of sales professionals say that collaborative selling has improved productivity by more than 25%, as well as increased pipeline by 25%.

Without the right tools though, collaborative selling can be a lot harder than it needs to be. With complex deals requiring an array of experts, sales reps need to solicit and coordinate input in a timely, fluid fashion. Managing that complexity is a job in and of itself, like herding cats. If stakeholders are able to get involved, they may not have critical context about a deal or customer if the information is trapped in silos — emails, chat threads, and other apps — rather than consolidated in an integrated system along with the CRM record.

Quip for Salesforce is built to facilitate collaboration and boost team productivity within CRM. It accelerates the way teams get work done directly within the context of Salesforce records.

By integrating things like meeting notes and collaborative plans seamlessly within CRM records, the extended team of stakeholders is able to access everything they need in a single place. Extended team members who don’t work in CRM can still be shared on Quip documents, keeping them in the loop as well.

"By fostering a culture of action and transparency, Quip not only builds trust but also empowers employees to get work done in a faster, consistent, and repeatable manner."

Having data and documents together has dividends: For example, beginning-of-the-year static account plans take on a whole new function when data is always up-to-date. Instead, they become living account plans that are actionable, data-driven strategies relevant throughout the year. With Quip for Salesforce, admins can automate the creation of documents
based on specific triggers and events using Salesforce Lightning Flow. These documents can use templates to provide consistency and accuracy. For example, a Quip document for a close plan could be embedded within an opportunity record, outlining all the information and tasks needed to convert that prospect to a customer, while auto-filling relevant data. Each close plan can be created from a specific template, tailored to meet the unique requirements of a given geography, industry, company size, or more.

By way of example, Maxar, a professional services company, has vastly expedited deal velocity for complex product sales and reduced proposal generation cycles by up to two weeks with Quip for Salesforce. According to Drew Kincaid, Senior Analyst of Sales Operations at Maxar, “Quip is instrumental in supporting high-velocity collaborative decision making in our customer relationship processes.”

Contrast that to a culture of action, which is built upon connectivity. Teams are connected to the content they need to make decisions, complete projects, and share ideas. People connect with their colleagues to find subject matter experts, and to their customers to build stronger relationships. Applications are unified to ensure data is available at the right time in the right place. With everything connected, businesses are able to accelerate their processes: ship products faster, respond to customers faster, close more deals faster.

By combining real-time collaboration and integrated chat with documents, spreadsheets, checklists, and more, Quip empowers teams to get more done with less email, fewer meetings, and greater visibility into team projects. This improved style of work helps Quip’s customers evolve from a culture of stagnation to a culture of action, where work gets done, not just discussed.

At Amazon, customer experience is what drives innovation. However, this requires a steady flow of accurate and up-to-date information that reflects the feedback of employees and customers. Amazon follows a process of writing a narrative that deeply analyzes a business problem, proposing solutions, and then holding meetings to discuss the proposals. Prior to using Quip, they used traditional tools for writing documents and sent them over email, which was cumbersome and time-consuming. Worse, keeping track of the latest version became challenging as more users were added. To empower the narrative process, Amazon provided its employees with Quip, which enables them all to collaborate on live documents instead of sending emails and waiting for replies. With Quip, Amazon employees are able to work effectively across time zones as they can review proposals and provide instant feedback. Quip has simplified the way Amazon captures and discusses input in real-time, creating a cohesive organization that functions in a faster and easier manner.

“By fostering a culture of action and transparency, Quip not only builds trust but also empowers employees to get work done in a faster, consistent, and repeatable manner,” adds Lepofsky.

THE FUTURE OF WORK IS NOW

CIOs know they have to deploy collaboration tools in order to help teams work better together. Successful leaders have learned that collaboration needs to have a purpose, and the tools need to be focused on business outcomes. Rather than just creating generic communities, a winning strategy is to embed collaboration directly into core business processes such as sales, customer support, and marketing.

Quip’s business productivity platform empowers teams to make informed decisions, share knowledge and best practices, and organize projects. Paired with Salesforce, Quip can optimize business processes such as sales and customer service, helping companies achieve more than ever before. Quip for Salesforce provides a new modern way of working, optimizing and accelerating work, transforming stagnant workplace cultures into cultures of action.
In the quest to increase revenue and improve overall sales, it is important for businesses to stay cognizant about current trends and implement new technologies. Besides, to keep the momentum going, organizations are at the forefront to tweak their sales processes in parallel to the emerging stratagems and approaches. Moreover, with the incessant evolution of artificial intelligence (AI), Internet of Things (IoT), big data, automation, and so on, it is no doubt that the sales forces today are accompanied by algorithmic allies to combat the sales impediments.

Having said this, the uncrowned king of current technologies, AI, has already pervaded its shadow in the sales sector. Umpteen regular sales tools like CRM tools and prospecting tools are implementing more AI-based features. So as to deliver predictions and recommendations based on the business processes and customer data.

Bug-eyed by the outcome of technological incorporation in sales processes, organizations are looking to collaborate with the right sales technology solution providing companies to replace the bland conventional approaches.

To help companies navigate through the best-breed sales tech solutions provider, CIOReview has compiled this edition on 20 most promising sales tech solution providers. Through a distinguished panel comprised of CIOs, VCs, industry analysts, and CIOReview’s editorial group, we have evaluated and shortlisted 20 organizations that have significantly stood out as some of the most prominent players in the sales tech arena for the year 2019. The organizations featured in this issue through their business knowledge and industry prowess have established their eminence in the sales tech sector.

We present to you CIOReview’s “20 Most Promising Sales Tech Solution Providers – 2019.”

**Company:**
Quip

**Description:**
Provides a cloud-based collaborative platform that enables clients to have documents, spreadsheets, and chat options in one place to boost productivity

**Key Person:**
Alan Lepofsky
VP of Evangelism

**Website:**
quip.com