Four Steps to Tag Team Deals in Sales

Otter.ai

30 MINUTES TO PRESIDENT'S CLUB

What's going on folks! Armand Farrokh here – Founder of 30 Minutes to President's Club, Author of Cold Calling Sucks (And That's Why It Works), and former VP of Sales.

When team selling goes wrong, it looks like a beginners salsa class where everyone's stepping on each other's toes.

There's an awkward silence when the AE passes the ball to the product leader. The sales engineer asks the exact same questions the rep asked two calls ago. The sales manager takes over the deal like a super rep.

But when team selling goes right, it looks like a perfectly orchestrated dance performance.

Your CRO is matching up with their CEO, your product team is getting your champion jazzed up about the vision, your SE is saving you from every technical trap.

Team selling lets you use executives to get to power, use product to beat the competition, and use sales engineers to disarm traps with technical buyers.

So today, we're breaking down the Four Steps to Tag Team Deals in Sales so that your sales calls don't look like the first episode of Dancing With The Stars:

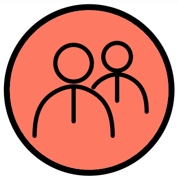
1. Pick the right tag team partner
2. Prime your partner (with a role)
3. Run tag team plays on the call
4. Maintain the tag team after the call

And along the way, we'll be giving you multiple examples where you can use Otter's deal collaboration tools to make this stuff a breeze.

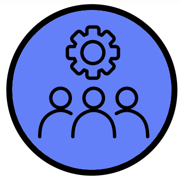
(**Sneak Peek**: Team selling requires a ton of work, but it's not that hard if you never have to write a deal primer for your VP of Sales again)

Let's tag team this one.

Step 1: Pick the right tag team partner



Sales Leaders & Executives



Sales Engineers

Product Teams

Legal & Security Teams

Before you jump into a tag team sales call, you need to know the right tag team partners for the job.

These are my 4 favorite tag team partners and when I like to engage them:

1. **Sales Leaders & Executives:** Use them early in a deal cycle to create early momentum or after you've won a champion over to justify getting access to power.
2. **Sales Engineers:** Use them for deep dive demos, pilots, or tough technical validation reviews with below-the-line buyers.
3. **Product Teams:** Use them in the middle stages of a deal when you've gotten the prospect aligned on the big problems, but need a bit more vision selling to beat the competition or cover gaps in your product today.
4. **Legal & Security Teams:** Use them during vendor review to lower the prospect's blood pressure around vendor risk (even if you know the answers yourself, there's something about a salesperson answering security questions that feels off).

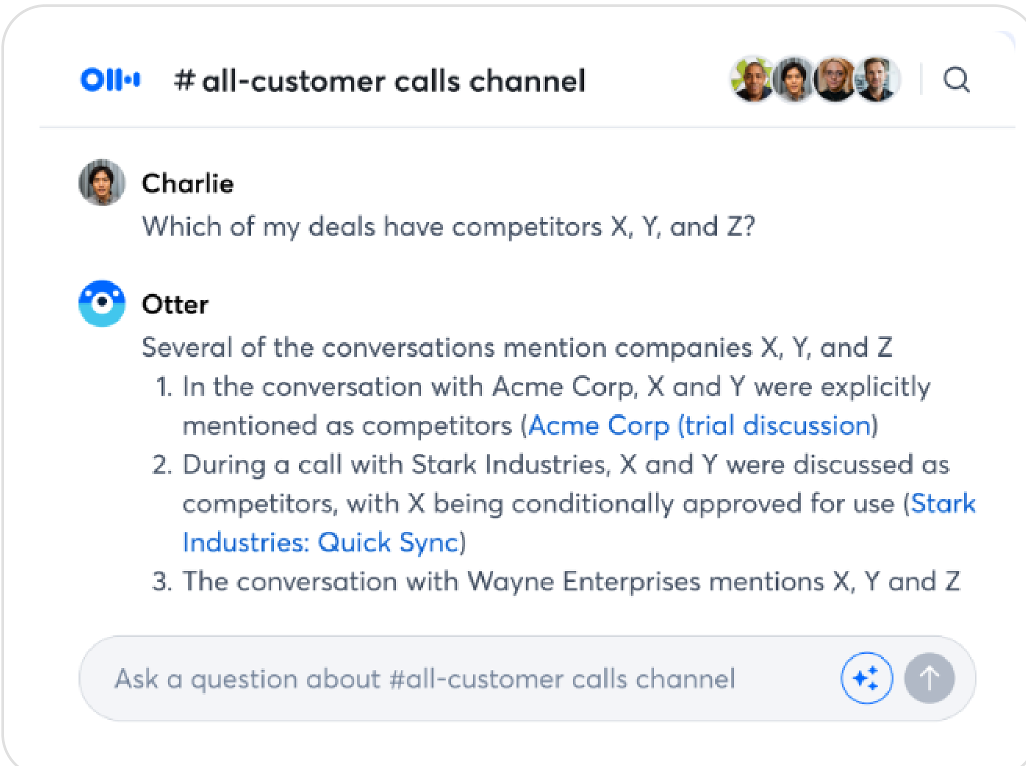
As you think about risks in your pipeline, ask yourself for each deal:

- *Where do I not have access to power?* (maybe I can level up with my CRO)
- *Where am I worried about a technical blocker?* (maybe my SE can run a 1:1 demo)
- *Where am I worried about a scrappy competitor?* (maybe Product can sell the dream)
- *Where am I worried about security risks?* (maybe I can pull in my CISO)

Try to reframe deal risks from "how do I solve this" to "who can help me solve this?"

Where Otter Can Help: Identify Deal Risks and Team Selling Opportunities

You could scour every deal in your pipeline trying to remember which deals were head-to-head… **or you could just ask Otter: "Which of my deals have competitors X, Y, and Z?"**



You can ask any of those questions in Otter AI Chat (see above). If you get a list of 5 deals where you don't have access to power, you've got 5 calls for your sales manager to join :)

Step 2: Prime your partner (with a role)

Even if you bring in the right partner at the right time, you need to be explicitly clear what you want them to do on the call.

I assign all of my tag teams one (or multiple) characters to play, with my 4 favorites being:

1. **The Main Event:** You're responsible for running the bulk of the call. This is common when you bring in SEs for demos or Product for roadmap presentation.
2. **The Storyteller:** You're responsible for helping us level up in the conversation and engage power. This is great with executives who can use stories to elevate the conversation.
3. **The Bad Guy:** You're responsible for having the hard conversations. My AEs would bring me in all the time to run the final cuts on the negotiation so that they could preserve goodwill.
4. **The Room Reader:** Your job is to look for trouble because I can't keep track of everyone. This is best used when you're running a demo or presentation and you need help keeping everyone in a big room engaged.

From there, if a rep brings me into a deal, I always standardize these 5 questions to prime me on the deal:

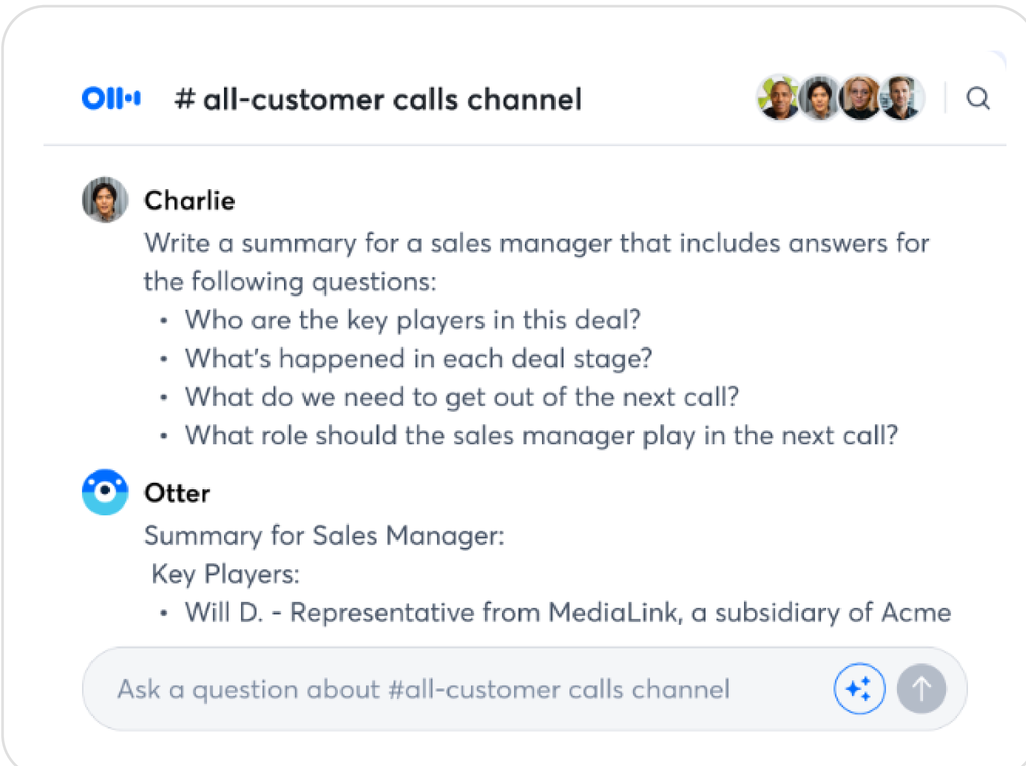
- Who's in the room?
- What's happened in each deal stage?
- What do we need to get out of this call?
- What role do you want me to play?
- What is your agenda for this call?

Got my role? Got my primer? Now we're ready to run some plays.

Where Otter Can Help: Never write a deal recap again

I don't know why, but I absolutely detest writing recap emails and primers. It's literally just moving information that already lives in my brain (or on a call recording) onto a piece of paper.

Fortunately, you can have Otter write all of your deal recaps and primers for you:



Tell Otter who you're bringing into the call and what questions you need for your deal primer and you've got an hour back in your day of scouring every call recording trying to remember what they said.

Step 3: Run Tag Team Plays

This is where it gets fun. When everyone knows their job, you can focus on orchestrating the symphony and adapting your call strategy as it plays out.

These are 3 of my favorite “tag team plays” that I use on calls:

1. **The Question Elevator:** If I’m the VP joining my AE’s sales call, I’ll often jump in when I feel like there’s something we should’ve dug into deeper. I’ll ask 1-2 questions, then before I finish my last one, then DM the rep “back to you” so they can pick up the conversation thread at a higher altitude.
2. **The Discovery Callback:** If an SE is running a demo or if Product is running a roadmap presentation, it’s your job as an AE to connect the demo back to discovery (“Jane, you mentioned this was something that was really frustrating in our last call…”)
3. **The Story Baton Pass:** I’d run this all the time with our CEO. Before I enter a demo riff, I’d say “Matt’s got a good take on this one” so that he knows it’s coming, then I’d do the demo riff and pause for him to jump in.

While it’s preferred to cue your partner into a play through your words, sometimes you have to use Slack or DMs when absolutely necessary (ie: “**POWER ISN’T PAYING ATTENTION**” would be really awkward to say in front of the customer).

I like to standardize a few Slack codes for common plays – for example, I’d often say “pull up” if the conversation was getting too far in the weeds or “back to you” if I used a question elevator and wanted them to take it from there.

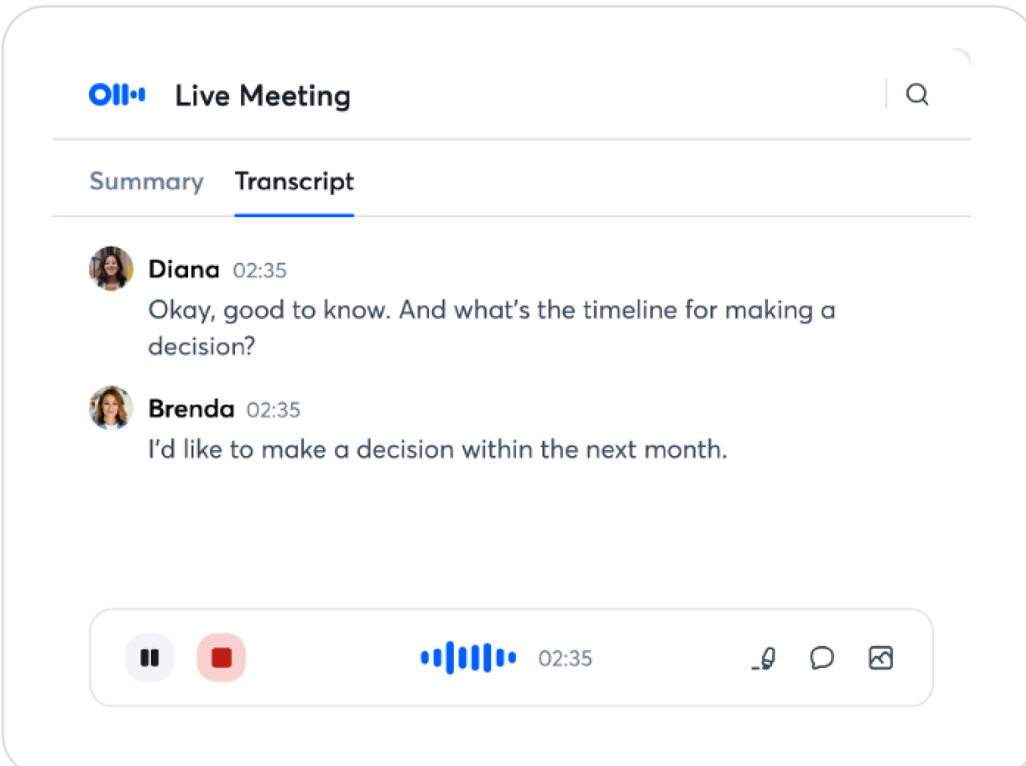
Try to avoid walls of text and constant pinging – it’s extremely distracting and frankly a lot of prospects notice.

Where Otter Can Help: Focus on the conversation, not on notetaking

Okay, I want you to imagine you're a full-cycle AE and you don't have a sales engineer.

How are you going to run a demo, while telling your VP of Sales what to do, while staying engaged with the room… WHILE TAKING NOTES?

Please let Otter take the call notes so you don't have to multitask (poorly):



Step 4: Maintain the tag team after the call

Once you've nailed the tag team, the **biggest mistake is that reps forget to stay multithreaded.**

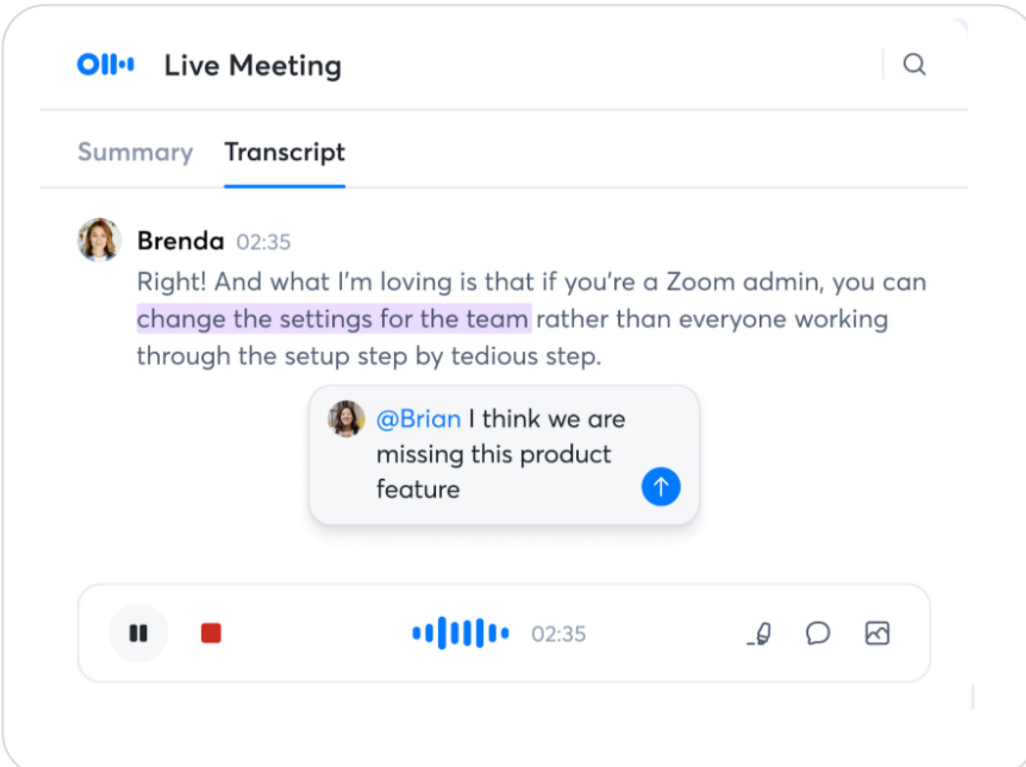
You never know when it's going to be helpful to have your CRO send a 1:1 message to the CEO later in the deal… but that gets really hard if you didn't keep them in the loop after the deal cycle progressed over the last 3 months.

So my recommendation for maintaining the tag team after the call is as follows:

1. **Debrief the tag team performance** with your tag team partner for two things: [1] did we both pull out the same key moments / risks in the deal and [2] did we achieve our goal and if not, what could we have done differently?
2. **You send the big recap email to the full group** as the quarterback of the sale
3. **Have your team send strategic 1:1 recaps** like a CEO-to-CEO email to open the direct lines between power.
4. **Keep your team in the loop on future calls** by tagging them in call moments and providing deal updates in a dedicated deal slack channel or email thread.

Where Otter Can Help: Keep your team in the loop

Again, it's work to team sell. But when you can **automatically recap all future calls, tag your product team into key moments where you got into a pinch with the competition, or share a quote with an executive that they can drop into a CXO:CXO email**, it's a lot easier.



Your ticket to becoming a team-selling machine

That's a wrap folks! If you follow these four steps, it's been proven many times over that team selling will skyrocket your win rates.

And Otter is one heck of a way to make sure that you never lose a deal alone.

Using our four steps as a recap you can use Otter to:

- Identify deal risks when you're picking the right tag team partner
- Automatically recap the deal when you're priming your partner
- Focus on the call, not the notetaking when you're running the tag team motion
- Keep your team in the deal loop to maintain the tag team motion

If you want to try it for yourself, **check it out here**!