



The Complete Guide to **Using Video in the Sales Process**

(With Examples)

LEADG2



Introduction

LeadG2 is your go-to partner to transform your revenue strategy. Through strategic integration of sales, marketing, and customer success, we help businesses align their teams and processes to generate leads, nurture prospects, close more deals, and delight their customers through B2B marketing, sales, and service tactics. But we're different from the rest. We're rooted in sales. Our parent company, [The Center for Sales Strategy.](#) has been helping sales organizations turn talent into performance for almost 40 years and we teach a sales structure known as the [Sales Accelerator Series.](#)

Recognizing the need to humanize the sales process, the Sales Accelerator Series is known for being more in-step with how real selling is done today while applying basic fundamentals. The steps include: **Identity, Connect, Discover, Advise, Close, and Grow.**

This sales process we follow helps:

- ➔ Sales people identify the best accounts
- ➔ Connect with them quickly
- ➔ Discover their desired business results
- ➔ Advise them on a solution that delivers measurable results



Sellers are taught how to remove surprises to speed up the sale, and then how to deliver on promises to grow the business. The process helps sellers build effective, tailored solutions while moving fast enough to achieve acceleration.

Many people may think video is only useful for marketing. However, video is equally beneficial when it comes to the sales process.



76.5% of brands and marketers that use video have seen a direct impact on business.



81% saw an increase in sales.



Brands that use video experienced a **66%** increase in qualified leads and grow revenue **49%** faster.

The benefits of using video in sales range from reaching decision-makers and creating personal connections to standing out in email and shortening the sales cycle.

Videos can be used at virtually every step of the sales process from that first introduction to closing the deal. From the top-of-the-funnel to the middle and bottom-of-the-funnel, videos help improve your communication, build real relationships, and sell smarter and faster.

This eBook deep dives into how to use video in every step of the sales process – and we provide examples for each phase. **Let's dive in!**

Table Of Contents

 Click icon or term to jump to page



Using Video in **Identify**



Using Video in **Connect**



Using Video in **Discover**



Using Video in **Advise**



Using Video in **Close**



Using Video in **Grow**



Conclusion



Using Video in Identify

Brief Overview of the IDENTIFY Phase

Identify is also known in other sales systems as "**Prospect**," "**Select**," or "**Find**." They all share the same goal of selecting Target Accounts. Some other areas the Identify phase covers are determining the best categories to target, and ways to find and qualify your leads.



Overlooked Points In Identify

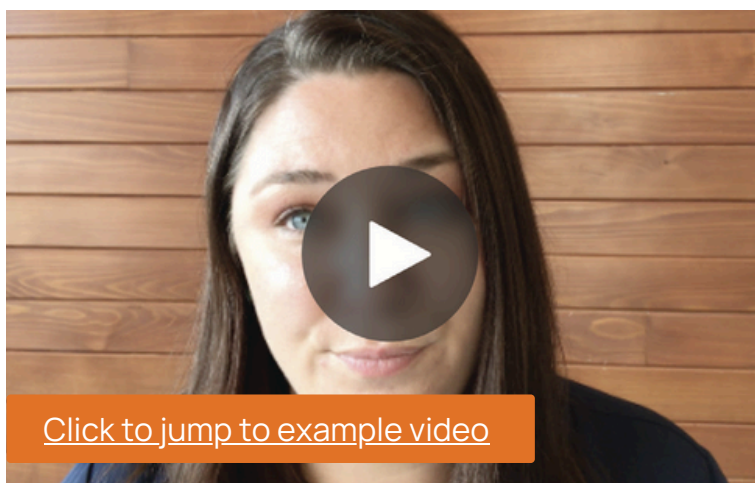


Using Video in the IDENTIFY Phase

In the Identify phase, you can use inbound marketing to promote your video content. Using video as part of your inbound strategy creates a stronger connection.

The whole purpose of inbound marketing is to allow prospects to identify themselves, and video can be a powerful vehicle to reach them. You can use video in this phase on LinkedIn to talk about problems you solve, humanize your organization, and remove the barrier of the screen by allowing your personality to shine through.

[Here's a brief example of how prospects and clients find us through blog content that contains video.](#) This blog has brought in several form submissions and new contacts since being published in 2019. Additionally, it's one of the blogs with the most page views and organic traffic.





Using Video in **Connect**

Brief Overview of the CONNECT Phase

Connect is also referred to as "**Approach**," "**Engage**," or "**Plan**." They all share the same goal of using your research and insights to create a valid business reason for making a connection and setting the stage for a successful first meeting.



Overlooked Points In Connect



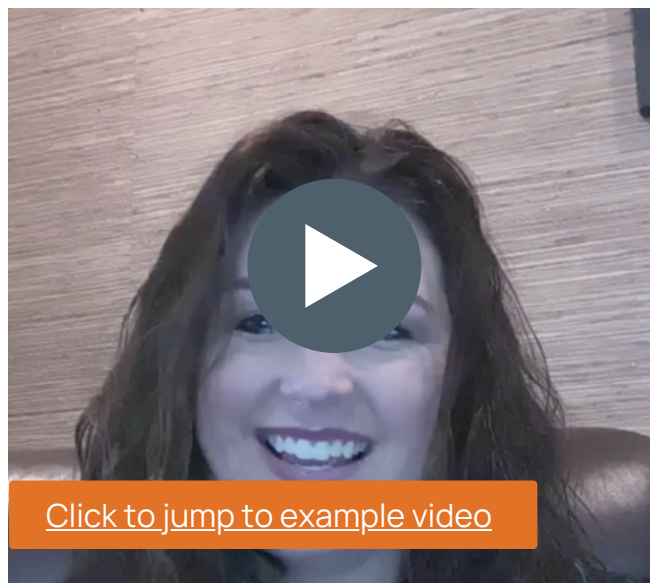
Using Video in the CONNECT Phase

Traditional emails have their place, but for salespeople who adopt powerful solutions like video to connect with prospects will differentiate themselves from the competition.

A subject line with the word 'video' in your emails [boosts open rates by 19%](#).

The top-of-the-funnel videos should aim at capturing your prospect's interest. Adding a personalized element allows you to do just that. Another tactic you can use to grab your audience's attention is to give them a sneak peek into your video by incorporating a GIF thumbnail into your email.

Here's an example of how a seller was creative and used a video message to communicate a valid business reason and set an appointment.



[Click here to see the video on how to connect to a new prospect.](#)

Other Types of Videos You Can Use During CONNECT:

- Case Study/Testimonial Videos
- Explainer Videos – Educational, Top-of-the-Funnel content
- Podcast or Livecast Recording to educate prospects
- Personalized Video



Using Video in Discover

Brief Overview of the DISCOVER Phase

Discover is also referred to in other sales process steps as “**Define**,” **Assessment**,” or “**Needs**.” All share the same goal of meeting with a prospect or client to uncover their desired business results.



Overlooked Points In Discover



Using Video in the DISCOVER Phase

Using video in the Discover phase is smart because it helps prepare both the seller and the prospects. This is also a great opportunity to summarize everything that you've discussed with your prospect to make sure that you are on the same page.

[Here's an example of how video can be used in the Discover phase.](#)



Other Types of Videos You Can Use During DISCOVER:

- Brand Videos – You are getting to know prospects, and they are getting to know you.
- Product and Service Videos
- Explainer Video – Educational and top-of-the-funnel content
- About Us Videos
- Podcast or Livecast Recordings – To educate prospects



Using Video in Advise

Brief Overview of the ADVISE Phase

Advise — also referred to as “**Solve**” or “**Create**” — focuses on creating the best solutions to deliver the desired business results and then advising the client how to proceed with the solution.



Overlooked Points In Advise



Using Video in the ADVISE Phase

Many sales systems imply that you go directly from the needs analysis to the presentation. We’ve found that the Advise step is most effective when it keeps the prospect involved in the process of determining the best solution.

One way to advise a client is to take them through a screen share and pre-advise showing what you will cover in the Advise meeting. It allows for a level-set and trial close.

[Here's an example of how video can be used in the Advise phase.](#)

Other Types of Videos You Can Use During DISCOVER:

- Case Study/Testimonial Videos
- Product or Service Video – You want to advise prospects on what we purpose through a customized proposal
- Explainer Video – Educational and top-of-the-funnel content
- About Us Video
- Next Steps Video
- Personalized Video

Objectives Our Partnership:

- Create an inbound marketing strategy GamePlan that builds a roadmap for a unified brand and improved marketing performance
- Content and campaign execution support that elevates your company as thought leaders and subject matter experts.
- Improve lead generation capacity of the website - Identify and engage middle-of-the-funnel prospects by making the website more dynamic and engaging.

DEAN MOOTHART
Director, Client Solutions

[Click to jump to example video](#)



Using Video in Close

Brief Overview of the CLOSE Phase

Close, also referred to as "**Confirm**," "**Agreement**," or "**Present**" all share the same goal of gaining final agreement with your proposal. At this step of the sales process, there should be no surprises in your proposal. You have the prospect's buy-in, and they practically helped write the proposal, so it's usually a simple matter just to confirm the sale.



Overlooked Points In Close

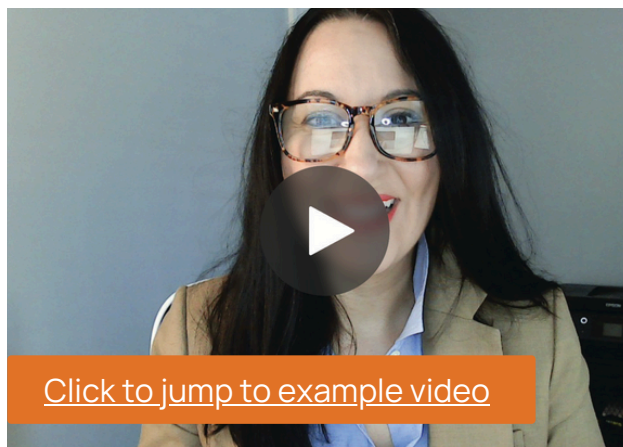


Using Video in the CLOSE Phase

Put yourself in the prospect's shoes and anticipate their concerns and questions. Show that you're easy to do business with by clearly mapping out the path to partnership and the next best step in the process.

Sending a video can also help reengage a prospect that has gone cold or MIA.

[Here's an example of how video can be used in the Close phase.](#)



Other Types of Videos You Can Use During CLOSE:

- Case Study/Testimonial Videos
- Explainer Video – Educational and top-of-the-funnel content
- About Us Video
- Next Steps Video
- Personalized Video



Using Video in **Grow**

Brief Overview of the GROW Phase

Grow, also referred to as "**Retain**" or "**Deliver**," comes after you close the initial sale. This sixth and final step in the Sales Accelerator process is often-overlooked and underutilized—despite having hidden revenue-generating opportunities. Closing deals is the ultimate goal in sales, but it's not where the work ends with clients. Salespeople should start to care about the renewal the moment they make the sale.



Overlooked Points In Grow



Using Video in the GROW Phase

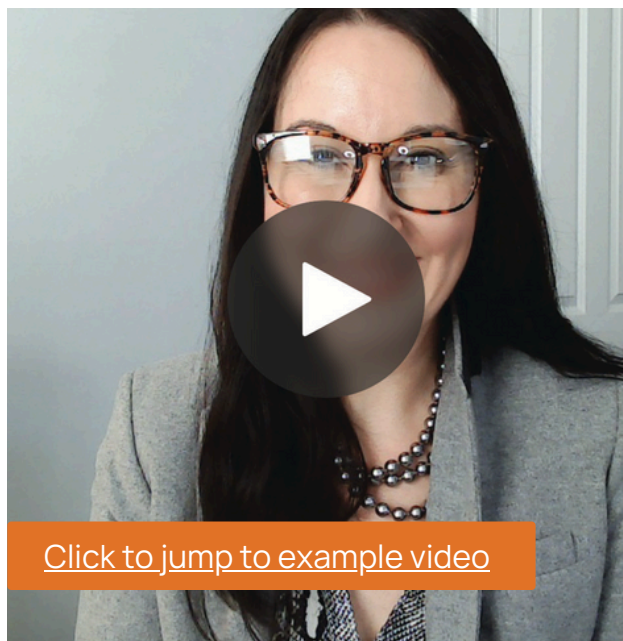
You closed the sale, but clients are in a post-purchase evaluation mode. They implement, measure, and evaluate performance against the sales promise. Clients decide on the future of the relationship. Salespeople must discuss results, prove value, and build on the rapport they previously created.

Don't assume that clients know the impact your solution has had on their business objectives. Show them. Arm yourself with data, statistics, and feedback, so the value you delivered is crystal clear.

[Here's an example of how video can be used in the Grow phase.](#)

Other Types of Videos You Can Use During GROW:

- Reviewing goals with KPIs
- Ongoing education and value added
- Introducing new ideas and solutions



[Click to jump to example video](#)



Conclusion

Make Video a Vital Part of Your Inbound Marketing and Sales Enablement Strategy

There are various types of sales videos and tools to help you create them. The videos in this eBook were created through [Vidyard](#). Other tools our team often use are [Loom](#) and [Vimeo](#). Here are types of videos that all of these platforms can help you create:

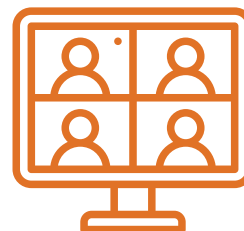


Personalized Video

Sales reps can use these videos to insert personalized elements like a name or a job title when sending it to prospects. They're great when you want to send one, or many videos but still want to retain that personal touch.

Screen Share Video

Sometimes it's much easier to show rather than to explain in plain text. In this case, you can use a screen share video. This video type is ideal for explaining complex topics such as a product demo. After all, you don't want to overwhelm your customers or leave them wondering what you're talking about.



Webcam Video

The most common type of video you'll see is a pre-recorded video that features a sales rep speaking into the webcam. They offer a face-to-face level of personal connection and are excellent at building relationships, which is why people use it as the first contact point. If you are on the go, then a webcam is your best friend.

Video Playlist

Once you have a handful of sales videos to use, create a video playlist! When you send your prospects a video, a playlist will allow you to add a video carousel at the end of your video. It's a smart and effective way to promote any related videos and increase the number of video views.



Cold outreach doesn't have to be cold. Video can add warmth to communications with potential customers or clients. When sales sends an email, it lands in an inbox full of similar messages. Add a personalized video to your pitch and it's a lot more likely to stand out.

The same principle applies when it comes to engaging inbound leads and building relationships after an initial sale. Sellers can record and attach personalized videos to messages whenever they follow up with a customer or client. This simple touch could help influence a renewal, upsell, or cross-sell.

Want to learn more about how to put video to
use in your sales process?

 Lets Talk





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