



eBook

Unlocking Sales Growth

A Modern Approach to Selling Technology

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Introduction

We know firsthand, from our 15 years operating as an MSP that selling technology products and services is an often complicated and time-consuming process.

There are nuances throughout the sales workflow. From unique customer needs i.e. how they want to buy and performance requirements, working with OEMs for discounts or non-standard pricing, to tracking down pricing and availability from distributors — it's a lot for sales reps to manage.

Not to mention the internal processes and tools your business uses to move through this workflow — which is a combination of offline and online motions that weaves between teams, partners and critical apps.

With today's customers demanding an amazon-like buying experience that's digital, real-time, and complete with flexible buying options, MSPs and VARs must have a modern sales workflow that makes this possible, is easy to follow, and repeatable.

This guide is here start down the path to this type of modernization within your MSP business.

Let's take a closer look at the strategies, tools, and technologies that will help you to transform your sales operations, stay ahead of the growing competition, and meet your customer's expectations.

In this guide, you'll learn:

- How to streamline every stage of the sales process, from discovery to deal close.
- How to eliminate inefficiencies and errors with connected, automated workflows.
- How to audit your tech stack and identify opportunities for improvement.

Whether you're tired of bottlenecks or ready to supercharge your sales team, this guide gives you the playbook to modernize your approach and win more business.

It's time to ditch the inefficiencies and embrace a smarter way to sell.

Let's get started!

01.

Understanding MSP Sales Operations

What is Sales Operations?

Sales Operations (SalesOps) encompasses the systems, strategies, and technologies required to support and propel sales teams toward maximum success.

One major challenge that many MSP and VAR sales teams face is the issue of connectivity between their tools, teams, and partners. As a result, your sales workflow relies heavily on manual inputs, copying and pasting, PDFs, and emails.

This often results in:

- Inefficiencies and errors
- Slower Sales Cycles
- Higher Operational Costs

When sales reps are bogged down with administrative tasks, they're not closing deals quickly or effectively.

The traditional MSP sales process is riddled with siloed apps and data, and while it might still work for you, it's painful and no longer acceptable.



What are the Roles and Responsibilities of an MSP Sales Operations Team?

Various stakeholders are involved in these stages, each playing a vital role:

- **Sales Rep:** Leads the customer interaction, gathers information, builds quotes, configures options, and presents proposals. Manages pricing and margins.
- **Customer:** Provides information about their needs, budget, and desired outcomes. Reviews and approves proposals.
- **Engineer:** Consulted for technical solution design if required.
- **Sales Operations:** Supports sales reps with pricing calculations, margin analysis, and compliance.
- **Manufacturer (Indirect):** Provides product information and specifications.
- **Marketing:** Contributes marketing materials or branding elements to enhance proposals.
- **Sales Management:** Provides oversight, coaching, and approval for quotes and proposals.
- **Customer Success (Post-Sales):** Ensures successful implementation and customer satisfaction after the sale.
- **Distribution:** Manages logistics planning if the solution involves physical product delivery.

What is the Technology Sales Process?

To understand how a [digitally connected MSP](#) sales operation can revolutionize your workflow, it is essential to break down the steps of the technology sales process in today's market.

The process generally follows these stages:

- **Discovery:** Collecting information about the customer and the deal.
- **Build:** Constructing a solution by adding items to the quote.
- **Review:** Updating costs for all items and setting prices and margins for the deal.
- **Configuration:** Adding support plan options and configuring pricing options.
- **Proposal:** Creating a professional quote or statement of work.
- **Acceptance:** Conducting a final review of all documents and getting the order accepted.



Discovery

Collects information about the customer and deal.



Proposal

Builds a professional quote or statement of work.



Build

Builds a solution by adding items to the quote.



Finance

OPTIONAL
Checks the Customer's credit worthiness for a finance plan.



Review

Special Pricing
Updates costs for all items.
Deal Desk
Sets prices and margin for the deal



Agreement

OPTIONAL
Allows for additional documents to be sent for authorization by the customer.



Configuration

Adds support plan options and configures pricing options.



Acceptance

Allows for the final review of all documents and acceptance of the order on behalf of the MSP.

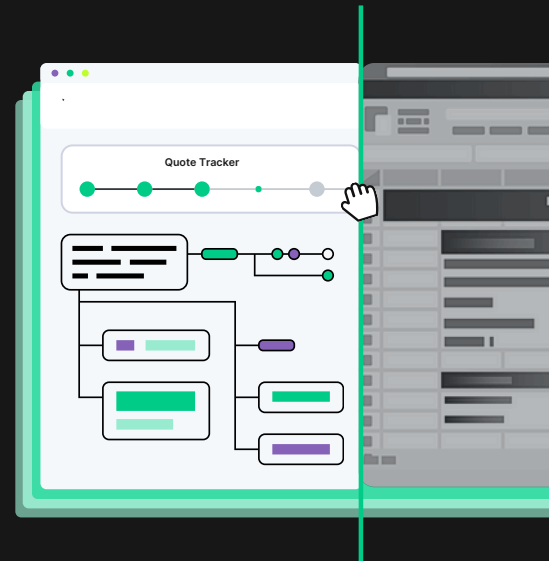
Traditional vs. Modern Sales Workflows: How Things Have Changed

The MSP sales process has evolved dramatically over recent years. Traditional methods, marked by disconnected workflows and manual tasks, contrast sharply with modern, digitally connected approaches.

Let's explore how these two paradigms stack up against each other.

Traditional (Disconnected/Offline)

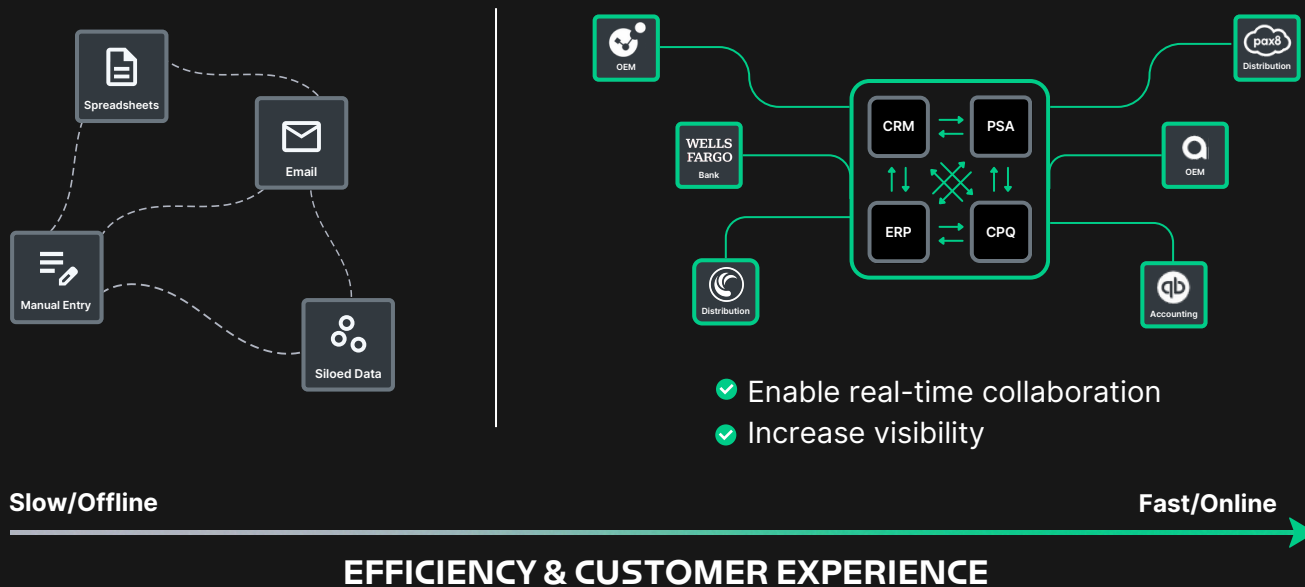
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This approach represents the old-school, manual MSP sales process we're all familiar with today.

Here's a glimpse:

- **Discovery:** Information gathering through meetings, phone calls, and email exchanges is slow and prone to missing crucial details.
- **Build:** This is the longest step in the process. Involving sales, operations, and engineering to build the necessary bill of materials. This can require on-site visits, complex software tools, and long configuration timelines. Then manually selecting products from price lists or catalogs is time-consuming and error-prone, making it hard to compare features and pricing across vendors.
- **Quote Creation:** Manually building quotes in spreadsheets or Word documents lead to inconsistent formatting and error-prone calculations. It's also limited to singular pricing models and unable to support complex bundling of solutions.
- **Review & Approval:** Physical copies or emailed documents require manual review and approval, resulting in slow turnaround times and errors going unnoticed.
- **Closing the Deal:** Paper contracts and manual order processing often delay signatures and increase the potential for errors in order entry.



Digital (Connected/Online)

The modern, efficient MSP sales approach leverages APIs and [automation](#) to facilitate each stage of the process:

- **Discovery:** Connecting your CRM to your sales workflow through CPQ software enables you to sync customer data directly to the quote and vice versa. It also speeds up the quote creation process and enhances accuracy by eliminating manual data entry.
- **Build:** Guided selling and interactive online forms streamline information gathering and can even automate the bill of materials creation, reducing engineering requirements for quotes. Eliminate manual updates with real-time product availability and pricing directly from your distributors.
- **Quote Creation:** A digital sales workflow unifies your data as you move through the sales process. With integrated product and service catalogs and automated pricing tools, it's fast and easy to generate consistent, real-time quotes with customizable proposals complete with e-signature.
- **Review & Approval:** Workflow automation tools provide electronic approvals and notifications, reducing turnaround times and improving transparency. Make informed decisions with the ability to review special pricing and automate approvals based on profitability thresholds, ensuring each deal maintains healthy margins.
- **Closing the Deal:** E-signature platforms integrated with the CRM facilitate faster deal closure, reducing errors and enhancing customer satisfaction.

Benefits of Digitally Connected Sales Operations

1. Streamline the Quote-to-Cash Cycle

Businesses that use CPQ software see a 30% faster quote generation time.

With a connected digital approach, customer information seamlessly flows from your CRM, real-time product availability and pricing are instantly pulled from your distributors, and compatibility checks happen instantly.

You can stop waiting on emails, chasing approvals, or manually updating spreadsheets. This will translate to a faster sales cycle, an improved customer experience, and increased sales team productivity.

2. Eliminate Errors

Manual data entry and disconnected systems can lead to costly mistakes in quotes and proposals. Digitally connected operations ensure everyone is working with the same, up-to-date information.

Companies with real-time product availability tools see a 25% reduction in quoting errors.

This eliminates the errors that erode customer trust and empowers your sales team to deliver flawless proposals, building stronger relationships from the start.

3. Improved Collaboration and Communication

Most IT service providers have a collection of powerful software solutions. The challenge lies in the lack of connectivity between these systems.

Traditional sales operations often result in information silos. This hinders collaboration and can lead to missed opportunities. A digitally connected environment breaks down these barriers by providing a unified view of the customer and enabling real-time deal tracking and approvals.

02.

How to Audit Your Tech Stack

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Start with Your Workflow

MSPs need to start with their workflow needs and work backward to the technology that best supports them.

Instead of asking, "Do we need to replace our ERP?" consider, "How can we optimize our current systems to support our unique workflows?"

This means going beyond the ERP tagline and diving deeper into what you really need to accomplish as an MSP or VAR.

It can be helpful to conduct a strategic audit of your tech stack to identify inefficiencies, gaps, and areas for improvement. This helps you align your tech investments with your operational goals.

How to Audit Your Tech Stack

1. Map Out Your Existing Tools

Catalog the tools and systems your team uses across key functions — [CRM](#), project management, quoting, accounting, invoicing, procurement, and more. This gives you a full overview of your current operations and helps identify overlaps or redundancies. Think beyond the ERP and consider best-of-breed solutions in each category.

2. Evaluate Each Tool by Workflow

Evaluate tools within the context of specific workflows. Break down your [quoting process](#) step by step. Identify the roles involved, the tools they rely on, and how each step connects (or doesn't) across the workflow. This uncovers gaps where tools might not be integrated effectively and manual steps that could be automated. When you're using an all-in-one ERP, you may find that these workflows are clunky because no one tool is best-in-class.

3. Gather Feedback

Talk to the people who rely on these tools daily. Where are they encountering bottlenecks? What could be improved? This feedback gives you a practical understanding of what's working and what's not.

4. Identify Key Requirements for Improvement

With a clearer view of your current tech stack, focus on what you really need. Consider platform-based solutions that fill specific gaps while enhancing integration across your existing tools. Whether it's automating manual processes, improving customer support, or streamlining quoting, pinpoint the areas where new software will deliver the most value.

03.

Applying Automation



How to Add Automation

How do you get started? Here are the three steps for turning on automation within your business.

1. Connect Fragmented Systems

The first step in implementing BPA is to establish connections between your existing systems. This involves integrating your PSA, CRM, and ITSM platforms to ensure data is flowing in real-time across all of your tools. Without this digital connectivity, building an effective automation framework is impossible.

2. Digitize your workflows

Once your systems are connected, you can begin digitizing manual processes. This involves converting spreadsheets or even paper-based workflows into digital formats.

Consider the sales process of a VAR. This usually involves a discovery phase, manual bill of materials (BOM) creation, pricing, and proposal generation. Digitizing these steps eliminates the need for manual data entry and expedites the process.

When we were an MSP, our internal debate centered on the question: are BOMs truly unique for each project, or can common elements be automated? We realized 80-90% could be auto-generated, significantly reducing the time required for each BOM creation and freeing up our engineers to focus on more strategic and value-added tasks.

3. Automate Repetitive Tasks

After digitizing your processes, you can identify opportunities for automation. Look for tasks that are repetitive, predictable, time-consuming, or prone to errors.

BOM creation, which can take days or even weeks, is an excellent candidate for automation. By automating these tasks, you can significantly reduce processing time and improve accuracy.

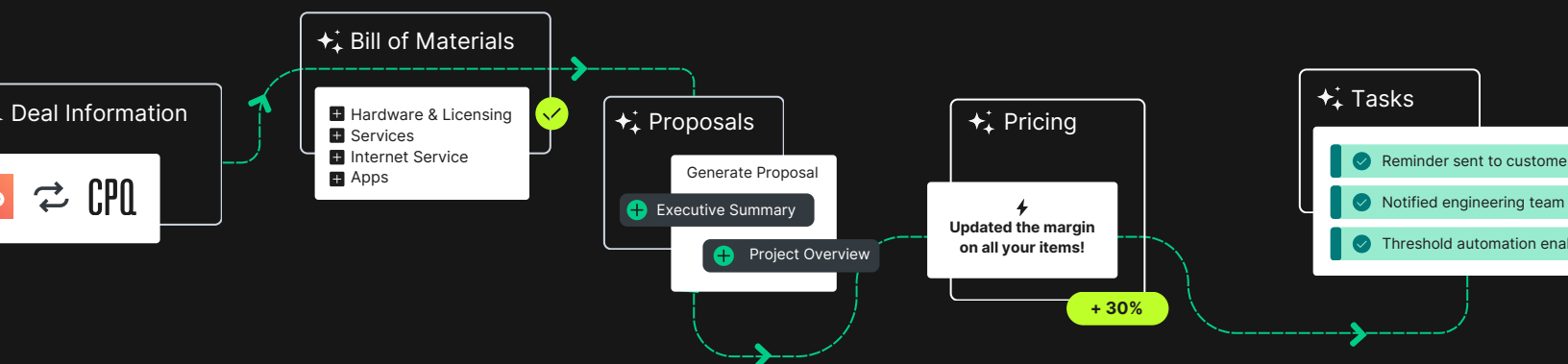
What Should MSPs Automate?

Automation is the key to streamlining your MSP sales process and empowering your team.

By automating repetitive and manual tasks, IT service providers can significantly reduce the time spent on administrative duties, minimize errors, and enhance overall efficiency.

Here are some crucial aspects of the technology sales process that should be automated:

- **Deal Information:** Automatically sync data between your CRM and CPQ to save time and ensure accuracy.
- **Bill of Materials:** Use digital workflows to instantly build standardized bills of materials for faster, more consistent quoting.
- **Proposals:** Generate tailored proposals with AI-powered tools, saving time and improving client experience.
- **Pricing:** Automate complex pricing calculations and approvals for faster quotes and negotiations.
- **Tasks:** Streamline collaboration between departments with automated task assignments and notifications.



What is TechGrid?

TechGrid is a SaaS platform designed for MSPs and VARs that reimagines the fragmented and manual quote to cash process so you can increase revenue, save time, and grow a more valuable business organically.

TechGrid is NOT a point solution. We create efficient quote, procurement, and payment workflows that actually work together and make you more productive.

How TechGrid Can Help?

Sales

Close Deals Faster With Smart Automation.

Quote complex IT solutions in minutes instead of weeks. TechGrid uses guided selling workflows, so you never miss an opportunity or leave revenue on the table.

Operations

Boost Collaboration & Streamline Workflows.

Connect all your apps, partners, and teams in one place. With a marketplace and workspaces, you'll eliminate silos and maximize your current tech stack's ROI.

Services

Standardize Delivery, Reduce the Chaos.

With TechGrid, you can use templates for agreements and statements of work, and kick off every solution with an automated bill of materials. No more building from scratch.

Executive

Drive Growth and Multiply Your Valuation.

With real-time quotes, online payments, and a personalized portal, TechGrid keeps clients coming back. Expect stickier relationships, recurring revenue, and more organic growth.

Built by MSPs, for MSPs

We started as an IT service provider but struggled with outdated systems and processes. The industry needed a digital transformation to better serve customers. So, we built TechGrid to modernize MSP sales and fulfillment operations, improve customer experience, and connect a fragmented IT ecosystem.



Ready to See How TechGrid Will Transform Your MSP?

Book a call with one of our experts to discover exactly how we can help modernize your sales and fulfillment workflows to drive efficiency and organic growth.



Request a Live Demo

See the TechGrid platform with live Q&A.



Book a Strategy Session

Work with an expert to optimize your sales and fulfillment tech stack and workflows.