

A Project Report
Client Engagement & IP Services

Submitted in partial fulfillment of the requirement for the degree of

Bachelor of Technology

In

Biotechnology

By

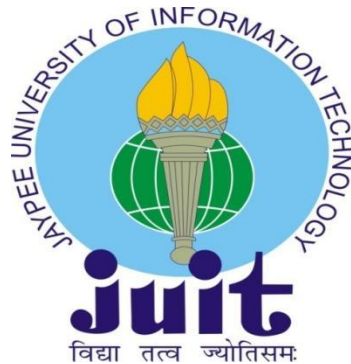
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UNDER THE GUIDANCE OF

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PREFACE

This project report was prepared during final semester. Joining GreyB as a trainee taught me the practical application and theoretical knowledge of engaging with clients and gave me an excellent platform in the beginning of my professional carrier.

This report was prepared during the training schedule and it was my life's most valuable experience which was full of learning and provided me with knowledge and practical application of knowledge in real world. This report is a result of four months of internship that I did in GreyB.

I wholeheartedly thank the organization as well as their Sales Department for giving me the opportunity to work on the latest technology and bringing out the best in me and developing my talent and improving my skills, not only in the technical field but also in my overall personality. Co-operating and assisting each other in the department helped me to explore my potential and perform much better.

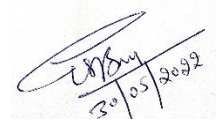
This report deals with understanding and implementing on How to engage with clients and consult them on Intellectual Property (IP) and Research & Development domain and what sales truly is. Since most of the information is confidential to the company, I have shared the maximum information in this report which I could.

CERTIFICATE

This is to certify that the work reported in the Bachelor of Technology academic report entitled '*Client Engagement & IP Services*' submitted by **Nitika Kumari Gupta** in partial fulfillment for the award of degree of B.Tech. Biotechnology from **Jaypee University of Information & Technology, Wagnaghat** has been carried out under my supervision. This report was not submitted to any other University or Institute in full or in part for the award of any other degree, certificate or other titles.



Mr. Dhruva Sood



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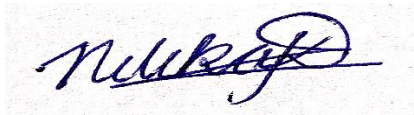
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DECLARATION

“I declare that this written submission represents my ideas in my own words and where others' ideas or words have been included, we have adequately cited and referenced the original sources. I also declare that I have adhered to all principles of academic honesty and integrity and have not misrepresented or fabricated or falsified any idea/data/fact/source in my submission. The work has been carried out under the guidance of Mr. Dhruva Sood.”



Nitika Kumari Gupta (181838)

Date: 14/5/22

ABSTRACT

This project report provides information about the internship experience that I had at GreyB Research Pvt. Ltd. GreyB provides premium search services to litigators, patent attorneys, open innovation leaders, etc. across the globe. They help cooperates and inventors in finding prior art related to the patent in litigation. They also help them in finding technology trends, competitive analysis, freedom to operate searches, infringement analysis, etc. GreyB also creates customized software for Intellectual Property litigators.

I was interning in the Sales department which is the link between the company's services and the clients, the role that I was offered was that of an Associate – Inside Sales. The person is expected to consult the clients in the areas where GreyB's services will be useful to the clients. Furthermore, they need to be comprehend about the latest technology advancements happening in various industries across the world and well versed in the Intellectual property.

This report is an all-inclusive document of all that I did within the time frame of the internship.

ACKNOWLEDGEMENT

It is a great sense of satisfaction and a matter of privilege for me to work as an **Associate – Inside Sales** with **GreyB Research Pvt. Ltd.** I wish to express my heartiest thanks to GreyB's Sales team for providing me with such an opportunity to undergo training in their esteemed organization. Under such a nice environment, systematic work approach and target oriented task management of this division provided me with the much-desired training experience needed for future professional.

It is my pleasure to thank **Mr. Dhruva Sood** to whom I owe a lot for giving me an opportunity to undergo training in this organization.

I would like to thank my colleagues, for their help and cooperation and remaining interactive with me during the times I needed their help and support.

Nitika Kumari Gupta (181838)

Date: 14/5/22

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CHAPTER 1: Introduction

1.1 GreyB – World’s leading technology and research firm

GreyB is one of the world’s leading technology research providing firm. It has a unique set of algorithms which it follows to help C-level executives grow faster than the others in their industry. GreyB is the right place for people who are scouting for innovation, research, and development, technological advancements, landscape analysis, etc.

Every year 2 trillion dollars are spent on R&D globally despite the amount of dollars spent productivity in this domain has dropped by 65% for the past 40 years. GreyB helps leaders across world to improve that, we provide a suite of R&D management and analytics tools for, startups, universities, businesses and research organizations. The power to grow, create a mark make an impact in the innovative domain of patent research.

GreyB’s mission is to explain every professional, how we make decisions, and why we do what we are doing? Inspired by technologies that will change in the future. Unlike the traditional method, GreyB does not only rely on patent literature to do prior art searches rather than it also searches through the non-patent databases along with very non-obvious sources from which data can be extracted. We help clients find hidden prior art, hard insights to win arguments, lead their IP department, build strong backbones of the R&D teams.

Core values at GreyB include a commitment to excellence, deliver, problem-solving approach, passionate about work that we do, innovative minds, act under tough conditions. Our searching strategy is obvious and we shout out loud to all that there is no strategy to reach the goal but at the same time there are hundreds of strategies but at the end, we conclude it that the “Process” matters the most and not the strategy.

1.2 Associate – Inside Sales

1.2.1 What is Business Development?

Business Development comprises of identifying opportunity, and then turning them into business & implementing growth strategy, leading to the creation of value. *It is the creation of a long-term value for an organization from customers, markets, and relationships.* Business Development is all regarding determining the interactions of these forces mix along to make opportunities for growth. It is the initial step of a Sales cycle where you bring novel business to the organization, and it is not just limited to bringing clients to the company but developing the business portfolio of the firm.

1.2.2 What is Client Engagement?

Client engagement is a complete customer relationship cycle. Starting from the business development stage, where you coldly reach out to a client in order to develop a relationship with them, to managing your clients account and bringing recurrent business to your organization. This complete cycle involves a lot of steps which are discussed in the later part of the report. It is one of the most import role of in an organization, because client engagement executives are responsible for bringing business to the organization.

1.2.3 Long-Term Value

Firstly, what do comes to your mind by long-term value is that ‘value’ stands for money which is the essential ingredient of any business (but money is often replaced by access, prestige, or anything else that the corporation seeks in order to grow). There are many ways to make quick monetary benefits or any resource for your company, but business development is just not about creating short-term get-rich schemes or to put it into different words something that you have created today and which will go tomorrow, but business development involves creating resources for long term value and which persist

over time. Thinking about business dev. as a means to create long term value is the only true way to succeed in consistently growing an organization.

1.2.4 Customer

The “customers” part of the definition is more obvious that the customer is the one who pays the invoice. They are the ones that use your services and pay for them and without them you don’t have any business to develop, but not everyone is a natural customer for your business, there can be many problems such as maybe your product doesn’t have the features some individual is looking for, maybe the service is perfect but the customer doesn’t even know what your company sells it, so tapping out different ways to reach the customer, engage them and have great relationships with them is also a role of the business development.

1.2.5 Markets

One way to understand the markets is through the demographics- if I’m looking to sell only to a particular segment right now and you are not in that, then you are currently unavailable for me as a customer, as I currently do not reach your market.

1.2.6 Relationships

As moon and earth rely on gravity for keeping them in orbit, any successful business development effort lies on underlying strong relationships. Managing, building, and leveraging relationship that is based on trust, respect and mutual appreciation of each other's value is the fundamental to enabling the flow of value for the long-term relationship. Relationships with customers, partners, employees, the press, etc. amongst others are critical for the success of any business development and demand a bold-faced spot in any comprehensive definition of the term.

1.3 Sales – what it actually is

Sales is an art – we all do it right from when we are born. We all are sellers and buyers in one way or the other. It's a skill that needs to be properly groomed and like any other role, it demands constant change.

Can skill become a limiting factor sometimes? I am not sure about the answer but maybe even skill can reach a stationary phase after rising exponentially. Change is the need of the hour and even our skills need to adapt with the demands of today.

1.3.1 The four P's that decide if you are getting better at selling

- **Personality:** Am I comfortable with all kinds of situations? Can I deal with rejection?
- **Process:** Do I understand the step-by-step process of what converts a prospect to a buyer?
- **Platform:** Am I known in the industry? If not, then what's the way forward?
- **Performance:** Am I motivated, productive, determined and persistent? Do I give up easily?

1.3.2 Sales Effectiveness

Interruption is lazy while Consistency is industrious. There is no second place in sales - only the best win. We all know the name of the first person who landed on the moon, but do we know who the second was?

We need to dominate the mind of the buyer and become the No.1 salesperson of our specific service, in our specific industry and area, for our ideal buyer. The solution is sales effectiveness.

Everyone defines sales effectiveness differently; some may say that it's the revenue generated by a salesperson and for others it could be the leads that they achieve.

I prefer to define it as the measurement of the ability to achieve specific outcomes. To achieve this, it's important to record everything, align goals, find the right content, standardize strategy, and optimize your process.

The mantra is to be persistent, patient and dedicated to your task.

1.4 Roles and Responsibilities

Working with GreyB as a Associate – Inside Sales includes processes both from the sales as well as business development fields. The main roles and responsibilities that were part of the profile are listed below:

1. Lead generation is one of the most important activities which is done through emails, sharing blogs, consulting clients, etc.
2. Preparing a sales funnel and constantly updating and maintaining is the most essential job for a Client engagement associate.
3. Understanding Latest research papers and patents.
4. Follow IP and R&D news to consult clients.
5. Building and increasing sales by building the relationship with new and existing clients.
6. Doing market research to explore novel business and tech areas, which are not fully explored and have a lot of potential.
7. Competitive analysis of competitors to know where your services are in the market.
8. Working very closely with marketing, sales & operations team to make and implement new business strategies.
9. People are always occupied, you need to catch-up with them and follow- up with them the earliest and convince them for a call.
10. Once there is a communication between the 2 sides, appointment should be fixed for further discussion details.
11. After a satisfied customer, you shall focus on building a network of such customers via them.
12. Develop technical aptitude to understand latest research.

1.5 Sales Department

A business group is an affiliate or quick relationship between a company and its customers. Anyways, a decidedly ready arrangements office achieves more than making bargains. Your business staff builds a relationship with your customers.

A quality sales rep understands a customer's important needs and guarantees that those necessities are met. Since the reps have a contact with your customers on an innumerable occasion, they become mindful of individual information that helps make bargains affiliations smoother and friendlier.

A more systematic arrangement allows the tailor to do what the individual customer needs to do and learn the arbitrary nuances of their needs. For example, the state guarantees you an office supply business. A customer collects your business and says they need printer paper.

The sales rep asks what kind of printer the business uses, how much work environment it takes to withstand the stack of paper, and whether they need high quality paper in any capacity. A construction company may require high-quality paper for a printing work test, and plans to screen it only for social events, not for the purpose.

Your business representative ensures that the customer gets what they need at the right amount and at the right cost. Additionally, a business office can improve your business in the same way as customer management.

A Quality Sales Representative will develop a pre-existing and complete contractual relationship with your customers. The criticism of individual associations in business cannot be taken lightly.

1.5.1 Objectives of Sales Department

Sales department is the most visible and the most important department in an organization.

While all other operations in an organization consume money, this department generates money by selling any organization's products/services.

Purpose of any organization is to generate revenue and profits. This department is responsible for generating revenues and profits for any organization through following ways:

- **To achieve Sales targets:** To survive and remaining competitive in market every organization has to generate sales to meet organizational goals. Sales department is responsible for achieving sales goals of a any organization month after month, year after year. Achieving sales targets means company's products /services are enjoyed by customers.
- This department achieves its sales goals by **increasing the reach of company's products at more number of shops or customers**. The more the number of clients, the more revenues will accrue to company.
- **To keep outstanding (accounts receivables) of the company in control:** the sales Department is responsible for increasing the sales of company by extending minimum credit to channel partners. It ensures that company's funds are utilized in more effective ways. Limiting credit to Channel Partners (CP) means CPs too invest their own sufficient funds in business.
- **To increase visibility in market:** This Department is also responsible for ensuring that visibility of its products and its promotional materials is maximum in market. Increased visibility leads to better sales
- Another goal of sales Department is to **collect information about various competitive activities and provide this information to top management on timely basis**. This action enables the top management to take timely corrective actions to safeguard its sale and market share.
- Sales department is also responsible to ensure that **each channel partner is aware of different policies, schemes of company** so that they can take advantage of these schemes to increase their sales as per company policies.
- To ensure that **sufficient stocks** are maintained at the customer end so as not to any sales to competitors due to less or nil stocks. Non availability big stocks of company products can enable the competition to gain customers for their products.
- Sales department is also responsible for **implementing the promotional schemes** of the marketing department in the market. Sales department has to ensure that customers for the promotion schemes have been designed get benefits of these

schemes and thus remain loyal to company by getting better value for money from company's products or services.

1.5.2 How to Improve a Business's Sales Department

There are a lot of approaches to improve a business unit. Depending upon your individual business and industry, what may work for you might not work for other business. As it may, there are a couple of basic rules you should follow to ensure you are maximizing your business division.

To begin with, analyze everyone's capability & ensure team mates are in the right spot to flourish. One of every odd type is ready to deal with situations. Chance are that you have couple of team mates who are failing to meet expectations, understand why.

Do they need help working with clients? Or on the other side, they would say they are maybe not prepared to such a high standard? Recognize any short-comings and make sure that your team mates have the energy they have to complete their job.

In spite-of whether or not done via a preparation program or training by a senior colleague, it's important that each and every individual from the business unit is given due attention to speed up their process. Make sure that none in your group is no getting notice.

Also, it is a good idea to look at what you are preparing for your business group. Make sure everyone agrees and make comparative preparations on the structure of your business needs. There are usually a lot of online programs.

Find a program that meets your company's goals and make sure all workers are ready for that program. Consistent, legitimate preparation keeps everyone in agreement and bounces colleagues and helps each other when important.

Next, see what your group describes. In the event that your business office needs inspiration, this is the ideal opportunity to rectify the stalemate you are experiencing. Make sure your driving force projects are focused on your entire Deal staff, not just the top 20 percent.

Understand if there is a way to rearrange and improve your driving force program to get more sales reps overlapping. Find out what your workers are doing and ask them what motivational forces they want to see.

In the long run, reward and experience are important. Individuals will be considered for their efforts and compensated when appropriate. It expands the impulse and relies heavily on separation.



Fig 1: Sales process cycle

CHAPTER 2: Literature Survey

Here I will include a survey of all the platforms that I learned in my 4 months journey at GreyB. Having a great knowledge of these softwares and Customer relationship management tools is very important for a client engagement associate as he acts a bridge between the internal team of the company and company's clients.

2.1 GreyB – Services Architecture

2.1.1 Features

GreyB provides access to few software, tools and online accounts which are used by GreyB internally and everyone in the company should be well acquainted with them. Some of these tools are shared with the clients as the reporting tools for the services we have to offer them, so from a CEA's prospective having a great knowledge of these tools is really important.

2.1.2 Competitive AI tool

Competitive AI tool is an artificial intelligence powered data visualization software. It is used to create reports according to uses' convenience. That is, you can drag and drop its features and make an attractive report according to your needs. This tool is really helpful to analyze data and show reports to your end clients in a meeting in order to make the repost more interesting and readable. This software is liked by IP attorneys and Open innovation leaders as it makes their present looks very attractive and makes a good impact on the audience.

It shows you records of all the patent filing that is happening in a particular domain. It has few features which help you to choose a specific domain, look at the patents based on the timeline or look at a technology and see the area with highest patent filing.

Competitive Intelligence AI

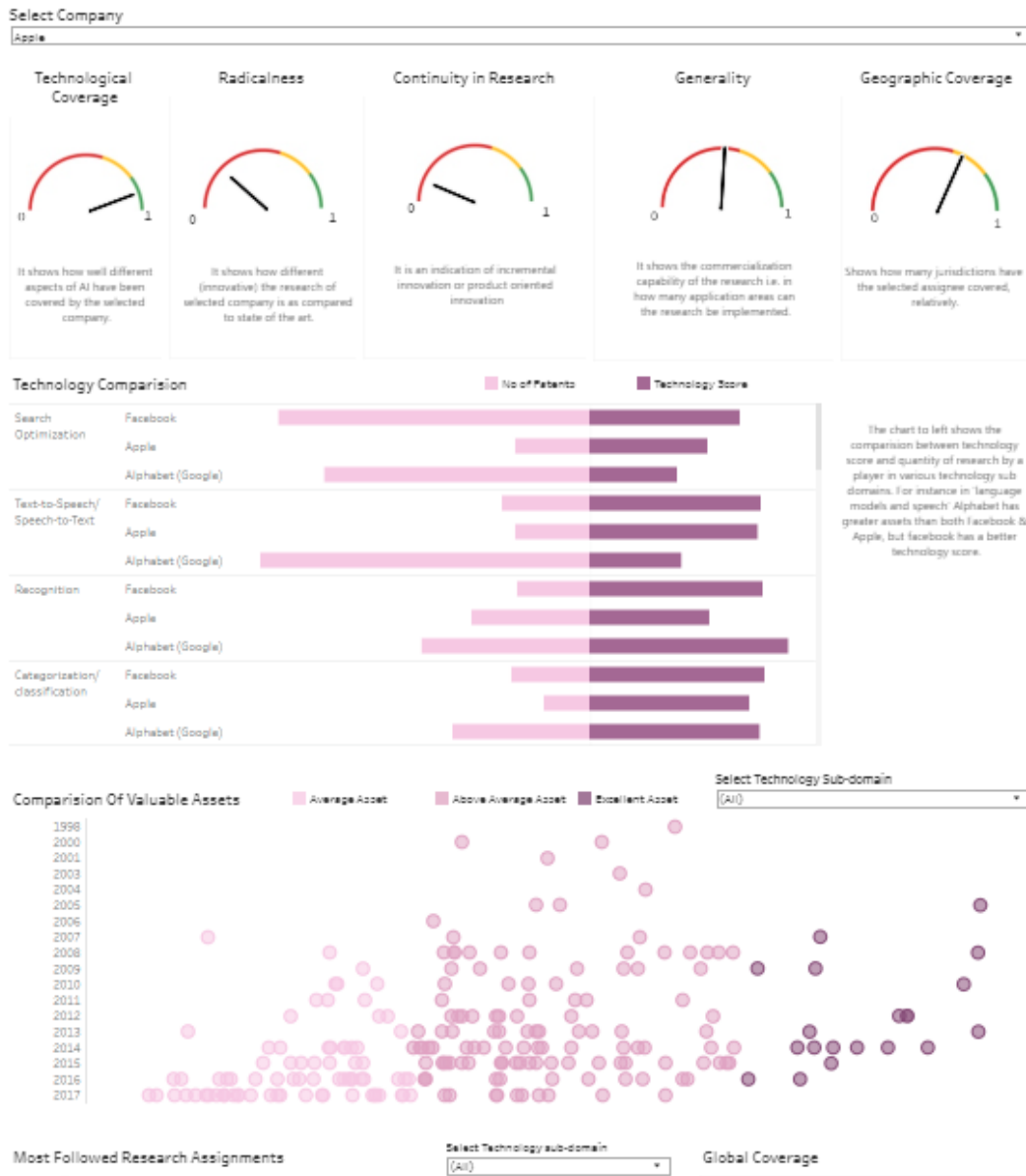


Fig 2: Competitive AI Tool interface

2.1.3 BOS – Business opportunities for Sales

BOS provides a central repository of your patent / pending applications, which prevents other applications from receiving grants on their pending applications. It introduces all blocked assignments and allows you to focus on non-invasive patent monetization strategies. It helps companies to provide insights, channelize efforts and reach the right audience.

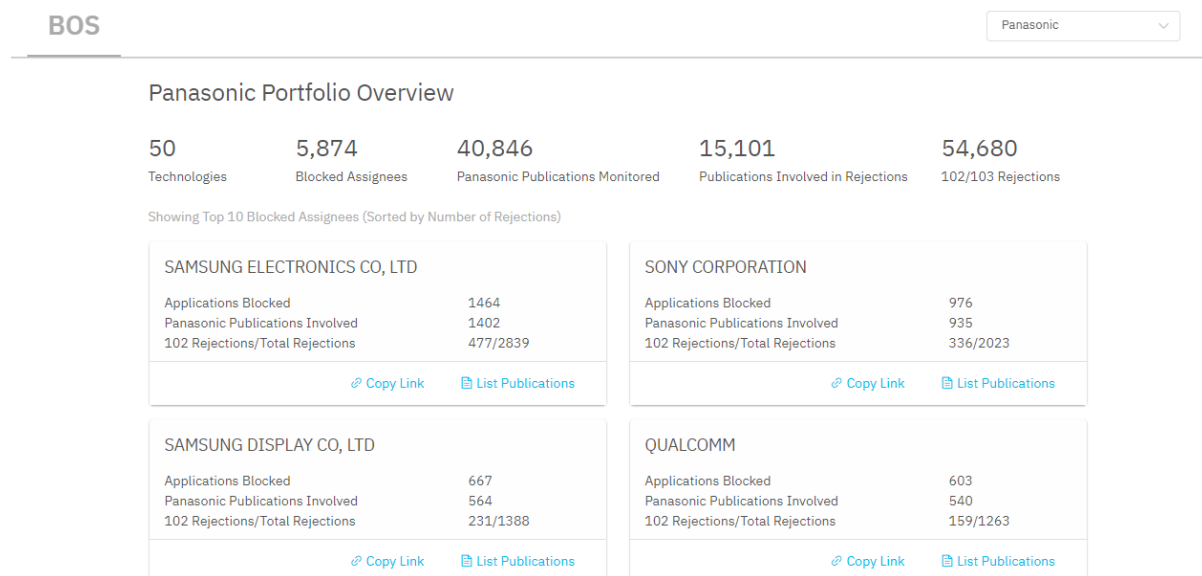


Fig 3: Business opportunity for sales interface

2.2 Customer Relationship Management

CRM Technology is Cloud Based. The Customer-Relationship Management Structure is a very useful resource that can be used to engage affiliates in arrangements and customer support, demonstrating a broadly inclusive view of customer relationships.

While the practice of CRM programming has its own advantages, cloud development takes CRM to the grassroots level by starting with your specialization in PC and server professionals in this field. When CRM data is protected in the cloud, it is usually very high level security.

When used successfully, CRM provides customers with the right to know the transaction stage, and provides them with fast and accurate information when they are usually available to respond. Buy clothes, groups and items in a better and more profitable way with exceptional, critical information and ability to reach customers and prospects. Due to the cloud, Appendix combines adventure and programming packs that integrate SFA and CRM into a unified, monetary intelligent game plan.

2.2.2 Why HubSpot was adopted?

HubSpot is one of the most popular CRM software. It is used across the world in different industries. Sales and marketing teams use it to keep the record of all the clients of their company and the relationship stage the client is in.

HubSpot provides access to keep 1 million contact which makes it really popular within the organizations. Also, it has many features that makes like of a sales representative very easy like we can schedule emails, create tasks for a sales rep, upload sample template, etc. Amongst others.

People also use HubSpot as a learning academy. It has a lot of certificated courses for the sales and marketing team members which help them get more efficient and knowledgeable towards their job.

The Free CRM With Something for Everyone

Think CRM software is just about contact management? Think again. HubSpot CRM has free tools for everyone on your team, and it's 100% free – forever. Here's how the free HubSpot CRM makes *your* job easier ...



Sales Leaders

Salespeople

Marketers

Customer Service Teams

Operations Managers

Business Owners

HubSpot CRM for Sales Leaders

With the easy-to-use HubSpot CRM, you'll never have to manually update reports or wonder how your team is tracking toward quota. Because you have more important things to do.

[Get free CRM](#)

Fig43: Customer relationship management - HubSpot

We were given a lot of trainings on how to use this CRM software more efficiently and make better use of our time. I have described more about the certified courses that I took and the later chapters of the report. It helps the organization keep records of all the past projects that they have done with different clients, so once the customer relationship manager of a company changes the new one can easily access all the records of the past conversations the company has had with the client.

CHAPTER 3: Training

3.1 HubSpot certification course

HubSpot (CRM Software) offers free online training for sales, inbound marketing and customer service professionals.

Topic courses (singular) bite-sized lessons comprehensive certifications, for individuals to enhance their carrier and business are its specialties. The certification courses are of different time duration which is classified further into sub-topics consisting of 5-10 mins video lessons by HubSpot academy professionals. We were assigned to finish the following six certification courses and present them over sales connect (which takes place every day over zoom/ cisco Webex/ google meets etc.)

All the certificates that we have earned completing theses trainings are valid for 1-2 years. They are really important for a sales and marketing representative as they teach about the various stages of a prospect in his user journey. The courses taught us about the **Attract, engage and Delight** phases of a buyer.

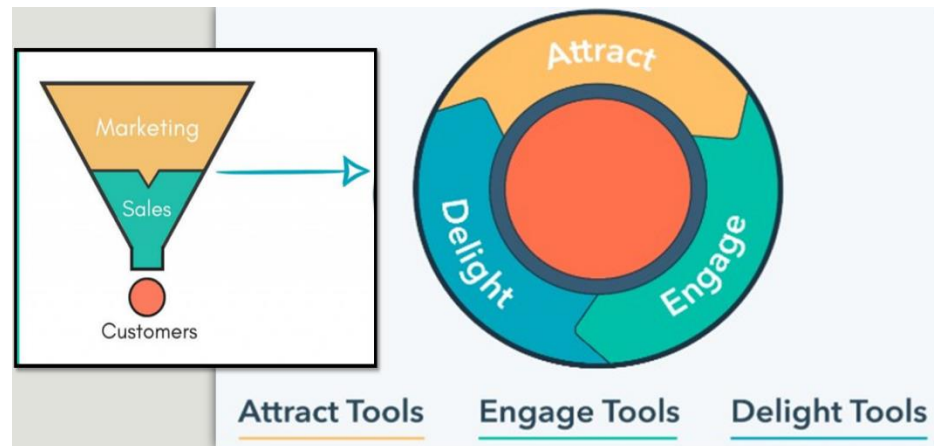


Fig 5: Attract, engage and delight

S.No.	Course name
1.	Inbound
2.	Inbound sales
3.	Frictionless sales
4.	HubSpot sales software
5.	Sales management training
6.	Sales enablement

Tab 1: HubSpot certification courses

Certification process

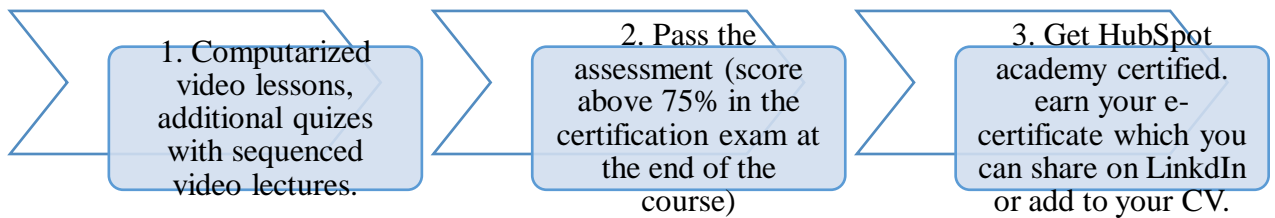


Fig 6: Certification process table

They taught us about the business models that a company follows in order to increase its sales.

3.2 Brad Lea's Master Class on Sales and Closing Course

Sales and closing are like dance, you need to learn steps from interaction to something getting sold to become good at it. We sell each other on - who we are, what we do, what we think, what we want, what we need.

We start selling from the day we are born. The difference between good and bad sales persons is that the bad ones are not aware that they are doing it.

Our mindset helps determine our perspective on things not only in sales but in life too. It's very important to develop the right mindset in sales - we are our own competition.

Be grateful for every single moment and day and remember that enthusiasm is an essential part of selling.

Mastering your mindset

- Everything that happens with you and around you may not be in your control, what matters is that our reaction is in our control. Make a conscious decision to choose your reaction. You are in control of yourself.

- **The 7 Be's:**
 - Grateful
 - Mindful
 - Positive
 - Respectful
 - Ethical
 - Aware
 - Confident

- Develop the ability to make quick connections and introductions by being authentic and sincere. Don't worry about judgements and just have good conversations.
- Remember that what I think about myself matters and not what others think. Develop self-respect, grant forgiveness not only to others but yourself too and be confident.
- Develop self-confidence by being truthful and ethical - be careful to what you talk with yourself.
- Stop lying to yourself because confidence comes from certainty and certainty comes from winning. Always do what you say you will and experience those wins.

The anatomy of a sale

- Sales is a game and we can master it. Just break down the steps and reverse engineer them. Closure only comes when a customer says no and the skill is to convert the no into a yes.
- Your appearance and style matter. The number one reason a person buys something is because they like the salesperson.
- A tie is not compulsion but just feel good and comfortable in the way you dress. Have your shirts ironed and shoes polished. Make your hygiene impeccable and dress to impress, especially yourself.

The anatomy of a sale – Steps of the sales process

- Preparation is the first step – to use all our resources and faculties. Just walk the inventory, check prices, get your bearings, check ads and offers, double check your mental readiness.
- Then comes the second step – introduction step. Remember to be buyer centric, leads to friendship and may be a sale.
- Gather intel/information and actively listen. Just break down their defenses and be empathetic.
- Talk about general fundamentals and key points, ask 10-15 good questions, not more than that and make it a conversation. A great sense of humor is cherry on the top.
- Build value of your product or service - learn about your products and services and don't just try to wing it.
- Ask for the sale gracefully without any awkwardness.
- Close the deal:
 - Perfecting the close - selling ends and closing becomes when a customer says no, converting that no to a yes is the true closure.
 - Closing is a mind game – find out why, can you separate the truth and lies.

Remember that not all customers are meant for you and don't let it bother you if you can't convert a no to a yes, move on, sometimes letting go is essential.
 - Solving problems

- Build value of your product or service - learn about your products and services and don't just try to wing it.
- Indoctrination - put the customers into your business books.
- Overcome objections and rebuttals.
- Ask for referrals - ask for them because if you won't ask for them then you won't get them. Know how to ask.
- Either just come out and ask or reverse the ask by flipping the script (become a buyer for the sale you want to make). Ask from people who have already received your service before.

Trust based selling leads to a sales break through.

- The hidden barriers to your sales success –
 - You don't want to be connected to the 'sales person' stereotype - be natural
 - You don't want to be rejected – never fear rejection again
 - You don't want to have to defend yourself – stay centered like a rock
 - You don't want to have to chase people – find the fit – the qualified customer
 - You have become really good at broadcasting, not connecting at deep level – listening, connecting, understanding

➤ **Principle 1**

Diffuse pressure – first from yourself, remove pressure and resistance.

➤ **Principle 2**

Get to the truth – truth of what is on your customer's mind.

They are afraid of being sold, pressure or even hurting you with rejection, so they lie.

Our goal is to find the truth from them. We want our clients to open up without any hesitation. First you need to yourself become transparent.

➤ **Principle 3**

Become a problem solver – helps to connect with people on a deeper level, Customers want to be understood and not sold.

The key is to understand their point of view and thus gain more trust. Don't just stick to your pitch of sales.

Step into your prospects world by understanding them.

- Trust based language – the way we articulate our words makes a big difference.
- We need to be eloquent and our tonality matters a lot as it should not pressure the other person.
- The power of your voice matters – remember to control your tone and pitch as to when to go high or low according to the situation.
- Remember to use trust-based words and phrases.

3.3 Sales Course - Secret of Sales

1. **The 3 promises that will have a real impact on the level of your selling –**
 - Don't waste time today thinking about tomorrow – plan and don't procrastinate, increase your willpower.
 - Don't miss out on your life, you only get one shot at it – become a contributor, make your life more meaningful.
 - You are the director of your own movie – the writer of your own script.
2. Be Bold – stay self-motivated, according to a statistic by BBC, only 8% of people who make new year goals, actually go through it and succeed, don't blame your luck, stop blaming and complaining.
3. Keep moving forward – secrets of self-motivation – You are the sum of your actions and not your intentions, do it because you want to and not because someone else says so.
4. Know about Why – according to propeller 80% of all sales are made by just 8% of sales reps, know why you are doing something before committing to it, it will fuel your motivation.
5. Reclaim your agenda – To drive more revenue, the methodology matters, meaningful activity v/s non-meaningful activity. Highly motivated v/s non-motivated people, set out 2 hours in the morning to do the most important tasks in your sales.
6. Why fear is stopping you – fear forces you to make short term rather than long term goals, remove negativity, lighten the office environment, find potential gains instead of potential losses.

7. Powerful Prospecting

- How to attract your prospect?
 - Get that appointment simply, easily and quickly.
 - Don't pester your prospects – it lessens the value.
 - We want someone to raise their hand and say – Hey! I am interested.
 - Personalize your ways.
 - Prospecting made easy by building buyer persona.
 - Make your personality suit prospecting.
 - Try to turn around the objections into your favor.
 - Deliver your message clearly.

- Ignore the rest, only 2 things matter –
 - You must get a response – talk less, listen more, for B2B sales, ignore the gurus, experts and clichés.
 - Have a step-by-step process to prospect and remember to stick to it.

- The only 3 outcomes –
 - To qualify a prospect.
 - To get an appointment.
 - To close a sale.

- The prospecting platforms - communicate with prospects on the platform they want to communicate on.

- There are 5 top ones –
 - Emails – don't get lazy with them, personalize them.
 - Phone call – We are social animals. Right?
 - Social Media.
 - Text Message – WhatsApp, We-chat, etc. platforms.
 - In – person meetings.

3.4 Inbound Sales

- Helping people have a friendly experience.
- Customer oriented.
- Empowers prospects.
- Gorgeous experience to the customers and buyers.
- Inbound Methodology: Attract->Engage->Delight.
- Become a resource for your customer.
- Consumers don't want to be sold to but want to be educated.
- Inbound Fundamentals: Inbound principles (consistent, personalize, optimize, empathize), company purpose, business goal, buyer personas, and buyer's journey (awareness->consideration->decision).
- CRM (customer relationship management): context database.
- Bottom of funnel (people who have used your services) feeds the top of funnel (people who want to use a service) in the business world.
- For inbound flywheel is a much better analog (its speed) as compared to funnel but the funnel can also fuel the flywheel.
- Customer service is important.
- Look for big drop between services.
- Cross team collaboration.
- A founder found a company either to help someone or if he himself wanted it first.
- Simon Sinek's Golden circle: why(center), how (outside to why), what (the outermost one – more concrete).
- If why is answered, then what and how fall into place themselves.
- Your company's culture.
- Jobs to be done.
- See from customer's point of view.
- Dig into the past of your customers by interviewing them as to what job your product is doing for them.
- Job theory: why your customers buy your product.
- Job story.

- **Job dimensions:**
 - i. Functional requirements
 - ii. Financial requirements
 - iii. Personal identity
 - iv. Social appearance
- Clarity in purpose of a brand, product or service.
- Every employee should believe in the company's purpose.
- Every department should be on the same note.
- Progress makes you feel motivated and engaged.
- Always keep learning and growing.
- OKRs (objectives and key results).
- KRs are measurable, two types are numeric(decimal/percentage) and binary (0 or 1)
- Pass the baton of KRs: key stakeholders->VPs/department heads->individual teams.
- **The horizon framework -**
 - i. Horizon 1 focuses on sustaining business.
 - ii. Horizon 3 sees into future.
 - iii. Horizon 2 bridges 1 and 3 and prevents fault lines between short term and long-term strategies.
- Align goals and objectives.
- Buyer personas.
- Create buyer personas to unify marketing, sales and customer services by taking inputs from all departments and submitting them to one department, preferably the marketing team.
- To do so use historical data, customer interviews and educated guesses.
- Buyer's journey: awareness (know that they are experiencing a problem or opportunity)->consideration (define and give a name to a problem or opportunity)->decision (prospect has decided on strategy, method or approach).

3.5 Presentation skills

After you convince the prospect to come on a discovery call with you to explore resonance between their company and your services. One should present their services with the help of a presentation and should focus on helping the prospect find a solution rather than just selling your services.

Many topics should be discussed and a perfect and clear call of action should be established rather than explaining your services you should also ask questions and make it a more interactive session rather than a spontaneous speech.

The way you position yourself will decide the fate of your business with the organization. So, portray yourself as equal and do not show your desperation of selling your product or service. One should keep in mind the SCOPE S as in standardized; C for conceptualized; O as in optimized; P for personalized and E for empathizing.

Don't forget that you are talking to humans with valid emotions. So, help the prospect of getting a way out of their problem and guide them throughout their journey.

3.6 Copywriting skills

One of the most important trainings in which the company invested the most of their time was the copywriting skills. Since we have to interact the most with the clients and writing good emails is the most important job of a client engagement associate.

The training comprised of a daily session of writing drafts for a unique situation which a sales rep might face in his career. Then those drafts were discussed with the whole sales team and we discussed that what could be the perfect draft to share in this situation with the clients.

Apart from this we were expected to read about this skill of interacting with people and share the article with the whole sales team. We listened to podcasts, read interesting articles and blogs of the industry leaders and shared them with our team. This contributed a lot towards developing our personality and being able to convey better.

CHAPTER 4: Key Responsibility Area

In the period of last four months my mentor taught me a lot of things.

I learnt about reaching-out to prospects by first identifying what type of services they require.

4.1 Reaching-out via Email – Personalization is the key

After we identify the prospects (by thorough researching), we need to reach out is to contact them via email. This is where the actual sales and consulting the prospects actually starts. We write down personalized emails to the prospect about the services he might need – with relevant articles from our website that he/she may find interesting.

The main idea behind these emails is not about asking but about letting them know that we know about their interests. This is the key to inbound sales – work flows in. The next step is being consistent with the follow-ups and convert the prospect into our client.

The following tips help in writing more personalized emails –

- Build your own writing style.
- Keep in mind the tone of your message.
- First write down whatever you have in mind – the first draft.
- Then start the process of removing unnecessary parts, adding missing parts, changing sequence of the sentences, and finalizing the final draft by keeping yourself in the shoes of the reader.
- Read your own email as if it was sent to you by someone else. This will help you in knowing how it sounds – the tone of it.
- Build context to a situation.
- Trade of between replying fast(time) and writing good material.
- Learning to write both formally and informally depending on the situation and person you are writing it to.
- Power of P.S. – whatever you want to write in P.S., it comes between regards, name and your signature/address. Don't overuse it.
- Try to have zero unread emails and reply to all those you have to reply to without any delay – acknowledging the emails connects you with others on a deeper level.

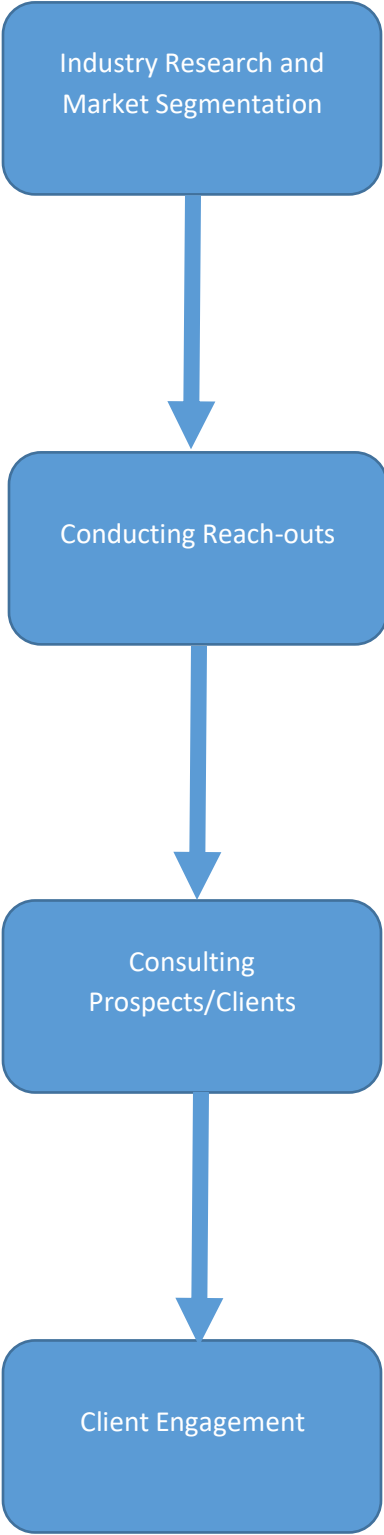
4.2 Engaging with clients

This is the most important step of sales as we are the first point of contact of our clients. This is more of a relationship building step. Setting up calls and meetings with the client is an important part of the job. Here we try to identify the problems which the client might face in his buyer's journey with GreyB.

We are in contact with the clients in order to give them information about the progress of the project, ask for their feedback and so on. Apart from this to develop a relationship we also share information with the clients in terms of blogs, interesting articles, preliminary analysis and other interesting things.

We even collaborate with the finance department of our company to get the invoices cleared and as a result trying to be the only point of contact with the client, so he always comes to you whenever he needs us.

Client Engagement Cycle



Flow Chart 1: Client Engagement cycle

CHAPTER 5: My Learning

The key points which framed the work-structure of my role as an Associate – Inside Sales were – researching about the industry and the companies in your market segment, reaching out to the ‘fit’ prospects, setting up a call, and then consulting them about our services and how they can align our services in their business.

Once we convert the prospect into a client then the next cycle is of indulging with client. That is, to identify their user journey and try to make their journey as smooth as possible. We keep ourselves engaged with the clients in order to receive recurring business from them.

The last step this cycle is to be in touch with the client even after the services are delivered to the client, we have to collect the feedback of the work we have done for the client and get all the finance dues cleared before we close this cycle and start another one.

So, to sum it up in a nut shell, even after it being a sales job it requires an engineer (a person with a technical background) to do this job. As you have to be aware about all the technology advancements happening in the world, so if you do not have any technology background you cannot understand the services that you are selling to your clients and cannot engage with client.

In today’s scenario when patent filing is just not a way to protect your invention, rather it has become a business to sue other cooperates and expand your patent portfolio. Providing patent services and R&D landscaping to the clients is really helpful for them as it makes their work easy.

GreyB not only helps its clients by providing manual search services but also have prepared few in-house software for patent litigators and counsels to make their work flow easy and faster.

The profile of Associate – Inside Sales at GreyB made me closer to the technology and advancements happening in the world, whose base was laid out in the 4 years of my bachelor's degree.

Although this is a not technical job, that is not something which engineers do after completing their engineering, but as mentioned above being an engineer made me qualify for this job more than anything else. This job not only requires me to have the knowledge of my own field but also of the other fields out there. Knowledge and learning have no end – it's an eternal process.

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