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B2B Sales, Lead Generation and Enterprise Customer Engagement for Collaboration Software: Evidence from On-the-Job Training at PeopleLink Unified Communications

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ABSTRACT:

This paper examines how business-to-business (B2B) inside sales, lead generation and enterprise customer engagement work for a newly launched software product with low brand awareness. It draws on a three-month On-the-Job Training (OJT) placement, from 25 May to 25 August 2026, in the Enterprise vertical of InstaVC, the SaaS division of PeopleLink Unified Communications Pvt. Ltd., Pune. The study describes the sales process followed, evaluates the calling funnel (about 200 calls per day, 100 conversations, 20 interested prospects and 2-3 prospects reaching the demo-to-purchase stage), and assesses the SPIN selling method and relationship-based follow-up. A single enterprise deal of Rs 3,50,000 was closed against an intern target of Rs 1,75,000 (200% of target), and it came through a referral after an initial refusal. The findings indicate that consultative questioning improves the quality of engagement, but that low brand awareness against Zoom, Google Meet and Microsoft Teams is the main barrier to growth. The paper recommends that the company add digital marketing to its outbound-calling-led approach.

Keywords: B2B inside sales, lead generation, SPIN selling, enterprise customer engagement, SaaS, unified communications, brand awareness

Introduction:

Inside sales is the practice of selling products or services remotely, by phone, video call or digital channels, instead of through in-person field visits. B2B lead generation is the process of identifying and qualifying prospective business customers, and enterprise customer engagement covers the relationship-building activities that move a prospect from first contact to a closed deal. Together they form the operational core of a software-as-a-service (SaaS) company's go-to-market motion in its early growth stage.

This paper reports a study carried out during an OJT internship at PeopleLink Unified Communications Pvt. Ltd., an India-based audio-video (AV) and unified communications company founded in 2007. PeopleLink has sold hardware for nearly two decades. InstaVC is its first dedicated software division and was commercially launched in 2026 after about eight years of internal product development. The intern worked as an Inside Sales Trainee in the Enterprise vertical, with regional responsibility for the South zone of India, and was engaged in outbound prospecting, consultative pitching, demo scheduling and delivery, and partner outreach.

The Unified Communications Sector

InstaVC operates in the Unified Communications and Collaboration (UCC) and video-conferencing sector, which bundles voice, video, messaging and content-collaboration tools into integrated enterprise platforms. The global UCC market was valued at roughly USD 168-186 billion in 2025 and is projected to reach about USD 780 billion by 2031, driven by migration from legacy PBX systems to cloud platforms and by hybrid work [1][4]. The Indian unified communications market was valued at about USD 5.6 billion in 2025, with a projected CAGR of about 14.5%, while the Indian video-conferencing segment was valued at about USD 659 million [2][3]. The sector is highly competitive. Enterprise buyers hold strong bargaining power, free or bundled tools such as Google Meet and Microsoft Teams act as substitutes, and global players such as Zoom, Cisco and Microsoft dominate mindshare.

PeopleLink and InstaVC

PeopleLink is a privately held, single-OEM company that designs its own video-conferencing hardware and software [5][6]. InstaVC's portfolio includes InLink (an engagement and CRM-style platform), InMeet (a video-meeting platform with clientless access, bandwidth optimisation, concurrent licensing and on-premises or cloud deployment), InWebinar (a webinar product with multi-panelist support) and a video API service. Its strengths are single-OEM integration, an on-premises option and a concurrent-licensing cost advantage. Its main weakness is low brand awareness for the new software line, and its go-to-market approach relies mainly on outbound calling and partner activation rather than digital or inbound marketing.

Objective:

1. To study the B2B inside-sales and lead-generation process followed by InstaVC for its enterprise SaaS products.
2. To analyse the effectiveness of SPIN selling and relationship-based consultative selling in converting enterprise leads for a software product with low brand awareness.
3. To evaluate the lead-to-conversion funnel (calls, conversations, interest, demos and closure) and the factors that influence conversion at each stage.
4. To examine partner-channel activation through PeopleLink's existing hardware-partner base as a complementary awareness channel.
5. To identify the challenges a new entrant faces against established global brands and to recommend improvements to the go-to-market approach.

Methodology:

The study is observational and is based on the intern's direct participation over the three-month placement. The funnel figures are self-reported daily averages from the live-calling phase, because PeopleLink's internal InLink CRM could not be exported. Two supporting files, a regional prospect list (twelve South-zone companies) and a partner-outreach tracker (about 180 partner records), were reviewed only as illustrative evidence. Sector data come from published market reports and company information from public profiles. The internship followed five phases.

Phases of the Internship

- **Onboarding (Weeks 1-2):** HR induction, product and service training, culture training, and mock pitch tests.
- **Practice calling (Weeks 3-4):** about 200-250 calls per day on a pre-used training dataset to build call flow and objection-handling skills.
- **Live calling and pitching (Month 2, Week 1 onward):** live South-zone enterprise data, using SPIN-based questioning before any product pitch.
- **Demo delivery (Month 2, Week 2):** training on demonstrations and independent delivery to qualified leads. The Mumbai deal was closed in this phase.
- **Partner webinar outreach (weekly):** calls to existing hardware partners, using InLink CRM data, inviting them to Friday webinars hosted by the Sales Head, India.

SPIN Selling and Relationship-Based Approach

SPIN (Situation, Problem, Implication, Need-payoff) is a consultative method in which the salesperson asks structured questions to uncover the prospect's situation and problems before presenting a solution [7]. The early live calls used a direct pitch and produced short calls and passive, polite refusals. Calls were then rebuilt around SPIN. They began with questions about the organisation and the tools it used, moved to difficulties with those tools, and introduced a product feature only in answer to a problem the prospect had named. For example, concurrent licensing was raised for cost concerns, on-premises deployment for data-privacy concerns, bandwidth optimisation for poor connectivity, and clientless access for staff who were less comfortable with software. Prospects were treated as relationships built over several contacts rather than as one-call conversions.

Results

Calling Funnel

Table 1 and Figure 1 show the daily funnel during the live-calling phase. Of about 200 calls a day, roughly 60 (30%) were unreachable or wrong numbers, about 100 (50%) became conversations, about 20 (10%) produced interested prospects who wanted a demo, and 2-3 (1-1.5%) progressed to the demo-to-purchase stage.

Table 1: Daily Calling Funnel (self-reported averages)

Stage	Count (avg./day)	% of total calls
Total calls made	200	100%
Unreachable / wrong number	60	30%
Conversations held	100	50%
Not interested (of conversations)	80	40%
Interested / wanted demo	20	10%
Progressed to demo-to-purchase stage	2-3	1-1.5%

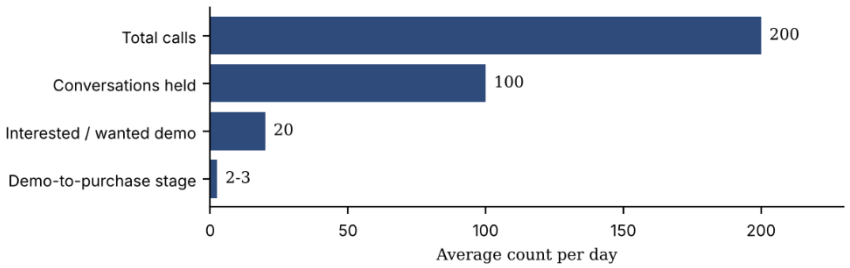


Fig 1 Daily calling funnel, InstaVC Enterprise vertical

Target versus Achievement

The intern closed one enterprise deal worth Rs 3,50,000 with a Mumbai-based client against an assigned target of Rs 1,75,000 (Table 2). The prospect had declined on first contact. A later follow-up call was made only to maintain the relationship, and during it he referred a contact who needed the service. Hardware-interested leads were also converted and handed to the hardware sales team.

Table 2: Intern Sales Target vs. Achievement

Metric	Amount
Intern sales target	Rs 1,75,000
Amount achieved (Mumbai deal)	Rs 3,50,000
Achievement vs. target	200%

Key Findings

- Headline conversion for a low-awareness SaaS product is low, but SPIN questioning improved the quality of engagement compared with the earlier direct pitch. This is a qualitative observation, because dated records for a before-and-after comparison were not available.
- Relationship maintenance, not the first pitch, produced the highest-value conversion, which originated from a referral.
- Partner-channel activation was a lower-friction awareness route than cold outreach, but it still needed repeated contact attempts to secure attendance.
- Brand unfamiliarity against Zoom, Google Meet and Microsoft Teams was the most frequent objection. In practice the objection was "we already have this and have never heard of you", so awareness rather than product capability is the main barrier.

Challenges and Limitations

Three challenges were largely resolved through individual effort: the uncertainty of the initial approach (resolved by adopting SPIN), the breadth of the product range (daily written revision), and rejection (calibrated persistence and treating prospects as relationships). Three were only navigated because they were structural: brand unfamiliarity, integration into a lean target-driven team, and an undefined sales process in a first-year product. The findings should be read with care. The funnel figures are self-reported rather than taken from system records, only one deal was closed so it cannot support a general pattern, the study covers only the Enterprise vertical and South zone, and the intern's view ended at the demonstration stage.

Conclusion

The study shows that, for a new software product, methodology determines how well a conversation goes, while brand recognition determines how many conversations are willing to begin at all. SPIN selling and patient follow-up improved engagement and led to the study's highest-value deal, but no volume of well-handled calls can build brand awareness one call at a time. Outbound calling alone therefore cannot remove the main go-to-market barrier.

The paper recommends that PeopleLink and InstaVC add a structured digital marketing programme to their calling-led approach. It should include targeted LinkedIn and Google advertising aimed at IT and operations decision-makers, and comparison content that answers "why switch from Zoom or Google Meet" using the concurrent-licensing and on-premises advantages. It should also use converted clients as case studies and turn the partner webinars into a marketed public series. A follow-up study using exportable CRM data across a full sales team could validate the funnel figures and measure the effect of any such marketing.

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