

Getting Sales Force Automation to Work

How automating the sales process results in better business management and improved CRM.

If you can get everyone to adopt a sales automation system, it will bring discipline to the sales cycle and increase business predictability. However, experience has shown that it's a very big IF--as in capital I, capital F. To succeed you need well-defined sales processes and unswerving executive commitment. The system also has to be simple to use and offer real value to sales representatives and other stakeholders.

Previous Systems

The field is littered with failed attempts to implement sales force automation (SFA) systems that were perceived as too complex, too much work, disconnected from the realities of how business gets done, and of little value to anyone but management.

The basic problem was that salespeople had their own personal spreadsheet in a drawer somewhere. Instead of sharing information about customers and accounts, that information was hidden away. It was difficult to forecast when a services opportunity would close or to plan effectively for the delivery of the service. Also, if a salesperson left, important knowledge about the customer would be lost. In addition, there was little real knowledge about the effectiveness of marketing programs, since these couldn't be tied to sales successes in any meaningful way.

A Fresh Approach

Take a fresh approach to sales automation with a new sales management system. To kick off the sales management system project make sure your sales process is well defined in the beginning phases. Select a sales automation tool that is compatible with your business. (For example, the consulting business involves tracking people usage over multiple project phases as opposed to widgets going through a phase process.) Involve a cross-functional team that thoroughly understands what salespeople go through on a day-to-day basis, and that makes sure the systems are customized appropriately in the pilot phase of the project. During this phase the sales process is mapped, focusing on the process itself as the most critical success factor.

Other important success factors are:

- Clear articulation of the value proposition around the tool
- Executive commitment from all your executives
- Win-win-win advantages for the sales force, the delivery teams, and the management

To gain rapid acceptance, the sales management system is designed to help salespeople get much more organized around managing their own business in their own territories, allowing them to spend more time with customers. It also helps delivery teams gain visibility into pending opportunities, so they can plan when their services will be needed. And it provides easy-to-create, self-serve management reports that can be detailed and summarized in many ways, allowing much better business predictability and what-if planning.

Better Business Management

Sales management system improves how you manage your business by enabling all sales representatives and managers in the United States to enter and track sales leads in the same way, using a common vernacular. The system increases the overall efficiency of the sales process, improves overall business predictability and resource management, and provides new opportunities for customer contact.

You now have a complete, automated sales forecasting and tracking system to use every week on your sales review calls. Also, with a sales management system you have the ability to tie in marketing on the front end, in order to identify opportunities from different marketing events. A bonus is having good, "fresh" data throughout the sales pipeline so you can manage your resources and collaborate more effectively. You also know who your customers are and how to contact them.

Other important benefits include:

- Unexpected new knowledge, because information can be presented in many ways to reveal new insights
- Validation of how well services offerings are selling, for marketing purposes
- The ability for individuals to bring up a list of sales opportunities, and search and sort in a number of different ways

- Improved account planning by attaching account plans to the sales management system so the entire selling team can see the broader context of the account

Improved CRM

From a CRM perspective the sales management system results in higher customer satisfaction, because sales representatives have a much better picture of where similar solutions were provided for other customers and can draw on that experience to improve their proposed customer solution. Also, because the delivery consultants have access to the sales management system, and management can better plan the mix of consultants available to a customer, the customer is assured of getting the right set of skills.

In addition, the sales management system allows much better preservation of customer information, making sure that vital knowledge about prospects and customers is not lost as sales representatives move to different accounts or to new opportunities. The system has also created a central contact database system that allows you to reach out proactively to customers with communications, such as a letter to the whole client base. You can anticipate that the sales management system will enable many similar future marketing efforts.

The long-term vision for the sales management system is to roll out a more integrated marketing front end, with full-blown campaign management and alliance management functions. You can also do back-end integration of this system into your revenue forecasting module and revenue accounting systems. Ultimately, the sales management system integrates with the whole accounting system.

Critical Success Factor

With the sales management system your sales representatives, delivery consultants, managers, and executives have a better way to run their business, to organize their thoughts, to get the right people involved, and to shorten the sales cycle. The most critical success factor is to start with a well-defined business process and integrate that into the tool in a manner that is simple, easy to use, and provides multilayer benefits to all constituents.