

## Spotlight On: Sales Force Automation Tools

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Sales Force Automation tools - systems and products that help build, nurture and manage client relationships



Because they wear snappy clothes, lunch at fancy restaurants and spend hours schmoozing on the phone with customers, the rigorous demands that sales representatives face each day are often overlooked by other contact center employees.

But every day, sales reps take tiny scraps of information - often just a phone number or a name - and through sheer persistence attempt to turn those tiny leads into relationships that benefit both the company and the customer.

Few technologies have done more to empower customers than the Internet, but such a development has created a new crop of both welcome and unwelcome relationship challenges for the average sales rep. While today's customers are often more informed and well researched than in the past, many are also less patient, more demanding and less loyal than ever before.

When clients contact sellers to lodge complaints or adjust a sales agreement, they've done their research, learned the stats and often have their information at hand to make their case. But for a frazzled sales rep juggling dozens of client phone calls, e-mails and meetings each day, an unexpected call from a disgruntled customer can be about as welcome as a trigonometry pop quiz.

Sales Force Automation (SFA) tools - systems and products that help build, nurture and manage client relationships - attempt to even the odds for beleaguered sales reps.

With SFA tools, salespeople can call up key client information with just a few keystrokes the moment a customer calls. They can also create custom e-mail, literature or phone campaigns to court potential customers, then track the sales relationship as it progresses.

Like many contact center products that have fallen victim to technology consolidation, individually sold SFA tools are quickly disappearing. But whether sold separately or as part of a suite of CRM products, core features remain unchanged. Here are some of the more common capabilities of SFA tools:

**Information Sharing:** Nothing kills a potential sale faster than a rep waiting for a customer's account file. With a customer able to connect to competing companies in just a few keystrokes, a sales rep's quick retrieval of updated data has become essential to a successful sales relationship. Using information sharing and contact management capabilities, colleagues across a network can access and update customer files, which remain in one central database. Client contact information can be sent directly to a sales rep's laptop or mobile phone, giving reps more freedom and the ability to spend less time in the office and more time out on the road, tracking down new leads. If sales reps need to share the data with colleagues, they can export it into spreadsheets and other formats.

**Customer Complaint Alerts:** When customers have problems with products or merchandise, they count on sales reps to be available at a moment's notice. With customer complaint alerts, a voice mail message or out-of-office reply is no longer a dead-end for clients. Many SFA products act as mini-alarms, sending customer complaint alerts to a sales rep's e-mail account, cell phone, pager or PDA handheld device. Mobile sales reps need no longer make frequent office calls to check for voice mail messages; with customer complaint alerts, keeping a cell phone or laptop plugged in is enough to stay in the loop.

**Activity Reporting:** Most SFA tools offer a strong advantage for managers interested in carefully tracking a sales rep's progress. With the activity reporting capabilities many SFA tools feature, managers track how each sales rep deals with individual customers, including where and when meetings take place, when sales calls are made, when customers call to log complaints and what is done to alleviate any problems. This helps managers and reps correct any snags in the sales process.

**Lead Tracking:** Most leads start with a fleeting bit of information - such as an e-mail address or a phone number - until the sales rep builds it into a strong relationship. With lead tracking capabilities, sales reps and their colleagues can use SFA tools to track how relationships progress right from the start, creating custom reports that offer a snapshot of which leads pay off and which do not.

**Lead Routing:** Most successful sales begin with one simple, but often-bungled procedure: the routing of the lead. Few activities kill more potential sales than a lead or query phone call sent to the wrong sales rep. With specialized routing capabilities, the SFA tool can automatically funnel a lead and any note or comment related to it to the appropriate salesperson, based on criteria defined by the manager or the sales rep. The tool can also route leads according to a sales rep's expertise, territory or any other specialized criteria.

**Internet-based Sales Tools:** Many SFA toolmakers have harnessed the Internet as a way to improve and enhance the sales process. Some companies store customer data on the Internet, others use software to access vast amounts of helpful online sales information. Some application service providers (ASPs) run entire SFA tool suites over the Internet, giving sales reps a flexible option for cultivating relationships, without having to worry about the restraints and headaches of technology maintenance responsibilities.

**Detailed Customer Data:** The greatest weapons in a sales rep's arsenal remain the comprehensive, detailed profiles of their customers. With SFA tools, sales reps can create complete customer profiles, with information on everything from past buying habits to previous complaints. When customer information is updated at one workstation, it's instantly updated across the entire network, insuring that no representative meets a client with outdated or inaccurate information. Another advantage: Multiple reps can access the information and add to the profiles, enhancing them for whichever rep is handling that client at the time.

**Historical Data Comparison:** Individually, customer habits are easy to track, but as a group, the process becomes complicated. With historical data comparison, sales reps and managers can spot problems and create reports on the purchasing habits of large customer groups. For instance, if dozens of customers complained in the past few months that their products did not arrive on time, sales reps and managers can use the analytical information and historical reports to isolate the problem, correcting it before it hurts the company's bottom line.

**Tracking Competitors:** Keeping track of what the competition is up to is an important advantage in sales, and many SFA tools go beyond merely keeping tabs on the opposing team. With competition tracking features, companies can not only monitor and log a rival's strengths and weaknesses, but also compare their own game plans with that of the competition. Managers and sales reps can also track when a competitor gains or loses a sales advantage, analyzing what worked and what didn't in that situation, in order to avoid the same mistakes within their own sales processes.

**Forecasting Tools:** With forecasting tools, sales reps can create their own sales targets and track their progress in meeting them. Reps can view the history of customer transactions, adjust their goals to align them with the overall health of the company, and tweak sales targets to meet any fluctuating changes in the sales process or the general strength of the market. Many forecasting tools even assign numeric values to sales opportunities, based on a sales rep's chance of closing the deal.