
SADR Extractions

Five Part E -Book Series from the 2005 Print Edition of "Sales Automation Done Right"



1. Blending Technology with Techniques
2. Direct and Indirect Benefits
3. Sales Methodology
4. SFA and CRM
5. Customer Knowledge Store
6. The Four Waves

Part 1

**Technology
and Sales**

SADR Extractions

Five Part E-Book Series from Print Edition of “Sales Automation Done Right”

We are releasing “Sales Automation Done Right” in e-book format in five parts following the structure of the print edition. When our print copies are all gone we won’t be doing another printing—the next book will be Opportunity Portfolio Management which expands on the sales methodology in SADR.

What’s included?

With each Part we are including the front matter, table of contents, introduction and index for the full book. Seems overkill but I can see situations where it might be useful.

The material from the book is exactly as it appears in the book – the same file is used to generate the PDFs.

Introduction to Part One – Technology and Sales

Part 1 talks generally about SFA, what it is and how it relates to CRM. It discusses the impact of CRM and SFA on the company and the people within it, and how it affects and changes company culture. There is also an illustration of the natural steps that organizations follow in adopting technology to solve operational and process pains, and how to short track the final solution.

This material will be of interest if:

- You are starting a new project involving CRM or SFA

- You want to explore the differences between CRM and SFA

- You are reorganizing your sales organization ready for CRM and SFA

We hope you enjoy the books—remember, the SalesWays HUB (hub.salesways.com) is the ideal venue for questions or discussion on the content.

Keith Thompson

April 2, 2013

Sales Automation

DONE RIGHT

Sales Automation

DONE RIGHT

LEVERAGING TECHNOLOGY
FOR COMPETITIVE ADVANTAGE
IN SALES

Keith Thompson Ph.D



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Toronto

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All companies, people, products and situations referenced in examples and case studies throughout this book are totally fictitious and are not intended in any way to relate to real life business situations.

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DEDICATION

To all my friends at Ardexus, and to my wife, for the patient support and encouragement needed to make this book a reality.

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Throughout the lengthy history of getting this book together I was fortunate to have two wonderful editors. Ted Frankel guided me in the onerous task of crafting my raw material into the beginnings of a respectable book. Leo Law took the mostly complete manuscript and challenged every nook and cranny of it until it met his very high expectations. Without either of them I could not have got this project finished. Jeffrey Barrie, I thank, for his enthusiasm and his efforts to speed up the schedule!

Many other people contributed, and I'm sorry that I can't mention them all by name. But special acknowledgement is due to all those very successful salespeople who lived and breathed the ideas of *sales automation done right*, and put them into practice. After all, they were the ones exposed to the most risk as their livelihood depended on maintaining high sales. But the new technology didn't let them down, and now they are the most ardent proponents of it. Thank you again.

P R E F A C E

In my early years I was not sure what to do with my life, and I think that this may have eventually given me the credentials to write a book about sales automation. Let me explain.

I studied as a physicist. When I look back, I took the easy way out. Doing physics was the easy way out because I was reasonably good at it—good enough to get a PhD. Unfortunately being good at something doesn't always mean you like it. Some aspects of research physics imposed disciplines that I thought were good for me. I liked the logic and the questioning. I was taught to question everything: Why? Why not? What does this mean? Why does that happen? A physicist never writes anything down unless it is understandable and defensible before their peers.

But at last I realized that physics didn't really excite me—but selling did. Even though I wasn't selling professionally, I was doing my best to persuade everyone I knew that my way was the best, whether it was which car to buy, or which book would make the best read. I wondered about a career in sales, maybe selling the very complicated instrumentation that I used everyday in my research. After all, I had some strong feelings about that too! So eventually, I escaped academia to start a career in high technology sales. Nine years of learning and practicing physics left me with skills I might not otherwise have had. The same skills helped me in my effort to find the best way of using the computer in the sales process.

That's why this book looks at sales automation through a magnifying glass. It examines the process of selling in a way that the technology would want to see it—clearly, with no ambiguity. The origin of the earth in a “big bang” can be described in the few lines of an equation. Why can't an accurate sales forecast depend on a nine-point Probability Matrix and the Priority Cube? In fact, it can, because logic and mathematics are the easiest languages for computers to understand. Existing sales methods need to be rethought so they fit better with the computer. This is what I've tried to do, and I think all those years in physics helped me get it right.

The Beginnings

In the early eighties, a few visionary companies introduced the personal computer, and although it was tagged “personal,” it was quickly adopted for business use, and driven by new spreadsheet and database applications that were designed specifically for it. Around that time, I started a distribution company specializing in the sales and service of high technology instrumentation. From the start, I was hooked on the way PCs could assist in all facets of business, even if it had very limited power by today's standards.

Business first adopted the PC in the financial and accounting departments (the Back Office). This is understandable, as the pure number crunching environment of the Back Office suits the computer best. But soon, other high value uses were found. Graphics and Desktop Publishing applications transformed the effectiveness of the marketing department. Networking and electronic mail made it possible for everyone to get *connected*. Also everyone quickly realized that networked PCs provided an excellent solution for the storage and dissemination of information. In large organizations, the PC was a genuine alternative to the mainframe; in small companies it was the first engaging taste of the possible impact of technology on business success.

Sales teams became interested. They are in the Front Office and their concerns were different to their Back Office comrades. While they do deal with numbers, much of their vital information was stored in the form of *text*. If a salesperson engineered a last minute tactic that saved a sale, the details could be recorded, and the information could be reused to secure future deals. To do this, technology was needed that could store *all* the significant events in a company's history with its customers, and then to make that information

universally accessible to anyone who might need it. Previously the Mainframe could do it, but, now the PC could too. Technology's promise of connected work teams combined with easy and low cost access to an abundant store of customer information was Nirvana to the early champions of automation in the Front Office.

The technology that first enabled true electronic collaboration between members of the sales team was Ray Ozzie's brainchild, Lotus Notes. Notes brought the essential pieces of the puzzle together in a gloriously unified and easy-to-use package: messaging, synchronization, security, collaboration, databases, and on top of all that, fast application development. In 1993, I realized that our company had to move to Notes if we really wanted a culture in which customer knowledge was created and shared by everyone, no matter where they might be, or what time of day it was.

We took the data from the endless files that resided in the marketing, sales and service departments. Files from paper, computers and people's heads were all put into *one* Notes database. Then we wrote the applications that allowed everyone to put information in, and take information out. When we finished, we had developed our own Customer Relationship Management (CRM) software. But, going forward from the progress we had made, we were fascinated by another important question. Given that the computer had so much capability to store information and analyze it in a million different ways, should it not also have the potential to help win a sale? I don't mean in the sense of being a glorified secretary, but actually getting involved in the sales process itself. The hopeful result would be that the salesperson would *win* more sales.

SFA and CRM

The term "Customer Relationship Management" or CRM, describes the vision and effort used by a company to develop close bonds with its customers. In the last ten years, software applications have been developed that are indispensable in making CRM objectives happen. CRM is predominantly focused on Front Office (customer facing) processes, and sales is a very important part of the Front Office.

The sales department is only one (albeit very important) element of the Front Office. Processes that happen in the sales department contribute

to the overall CRM effort. Sales Force Automation (SFA) is about using computers to make sales teams perform better, and part of that mission is tightly integrated with CRM process, but part of it is not. This is why the understanding of CRM and SFA has too many businesses and salespeople confused.

The terms SFA and CRM are often confused and wrongfully equated. Sales Force Automation should focus on increasing the *effectiveness* of the salesperson, that is, to make them more competitive in the sale itself. This is a little outside of the scope of CRM, which is more focused on the *efficiency* of the salesperson in handling the customer transaction. As you can see, SFA and CRM are closely intertwined and even though some readers might think this book should be called “Customer Relationship Management done right,” that would not be correct. *Sales automation done right* strives to demystify the separate identities of CRM and SFA by focusing on the impact of technology on *sales effectiveness*.

My company’s early work in using technology in the business had given us a CRM tool in which we could embed our sales automation. After all, we had a company to run and our business was selling. Our primary objective was to give a computer to every salesperson and let them run with it. When we looked at existing sales methods, we realized they were designed in an earlier time—before computers were so easily accessible. We now had to devise a method to fit the computer.

Developed and Tested in Real Life

Over a ten year period, we crafted the ideas and methods that form the bulk of *sales automation done right*. The design team was a wonderful mix of seasoned (but open-minded) sales veterans and enthusiastic young computer programmers. The ideas presented here evolved through debate, argument, and acres of diagrams scrawled over whiteboards and the backs of napkins. As we developed the ideas, we rolled them out through the software to the sales force. We had a dozen salespeople, so we quickly got feedback on whether our stuff worked, and in many cases we had to do some fine tuning.

The reason that I am a zealot for automation in sales is that I have first hand experience of the dramatic benefits it can bring to the success of the company. Our CRM and SFA infrastructure enabled our business to sustain

double digit growth over many years, with very little increase in administrative and support overhead. Our salespeople were able to win more sales by being more competitive and more efficient. The thing is, any company can do it, but sadly, most don't. Large enterprises have rushed to embrace sales automation (through CRM), but small business is lagging way behind. It's a pity, because the payback can be very high and the returns come quickly. There's no doubt that managers and executives who have the ability to make the changes are thinking about it, but with this kind of business change, it's easy to deliberate on the issue for far too long. I hope that some of the ideas presented here will provide the catalyst to hasten more budding projects into reality.

How to Read It

If I pick up a new book, I always skim it. I gravitate to books that lend themselves to be read that way, so it's no surprise that *sales automation done right* is just like that. For that reason, there are a lot of diagrams. The chapters tend to be short, and are divided into five Parts. Essential points are summarized at the end of each chapter. In Parts 2, 3 and 4 there is an underlying thread which is important for the reader to understand.

Part 1 talks generally about SFA, what it is and how it relates to CRM. It discusses the impact of CRM and SFA on the company and the people within it, and how it affects and changes company culture. There is also an illustration of the natural steps that organizations follow in adopting technology to solve operational and process pains, and how to short track the final solution.

Part 2 shows how the day-to-day selling activity evolves around four core competencies of selling management. It shows how sales automation can have a positive impact on the administration, organization and management challenges associated with those competencies.

Part 3 is the heart of the book and centers on the *meaning* of "selling" and the need to describe it in a language that the computer can understand. It shows how customer interactions fall into two distinct categories, one of which leads to the framework of the sales process. A picture of the sales cycle evolves with fundamental selling skills used in the appropriate way as the sale develops. A generic way to gain consistency in forecasting is presented, and a

link is drawn between the judged value of a sale at a specific point in the sales cycle to the priority that the sale has in a portfolio of opportunities.

Part 4 homes in on technology and the different ways it impacts the goals of sales automation. There is discussion of how a model of the sale can be derived, which can then be stored in the computer and used to measure progress in an actual sale. The importance of good interface design is explored, along with the advances in hardware and connectivity that make the application useable.

Part 5 briefly discusses the issues that are important to make sure the sales automation project works, warns of potential pitfalls, and reflects on the importance of technology as applied to improving sales effectiveness.

A few words about the layout: Propositions are scattered liberally in most of the chapters, and are meant to be thought-provoking. Bolding stamps out **big** words that are essential to the concept and italicizing reinforces the *power* of the word in its context.

A number of definitions appear in the text, where appropriate, mainly in discussion of the sales method. A more complete collection of definitions is included in the glossary.

Even though the content of *sales automation done right* was conceived in the working business environment of a company that was at the smaller end of the SME (Small to Mid Enterprise) designation, I think that the material is of value to anyone in sales, from the executive heading up the global sales operation, to the manager of a small sales team, to the solo salesperson working it out on their own. The wonderful thing about the sales process is that it is simple, elegant and universal.

Whether you have the stamina to plough through it all, or you just catch a piece that makes your sales effort stronger, I hope *sales automation done right* makes an enjoyable read.

PART I

Technology and Sales

Blending Technology with Techniques

To do it right—you can't have one without the other

Technology is dramatically transforming the way people do things. Acutely aware of this, business is scrambling to reinvent itself. Companies are striving to profit from any way that technology can streamline and enhance all their business processes. Technology is revolutionizing and redefining every corner of the organization.

There's no excuse to remain in the dark ages. The best technology is *affordable* to any business, and the last ones to find this out will be left in the dust. Even solo entrepreneurs working in basement offices are using technology that was previously the domain of the large enterprise: global communication, accounting, finance, graphic design, electronic marketing, and more.

The way technology is used is also changing. Until recently, companies focused on using technology **inwardly**: making more product and cutting expenses. Now they are turning **outwardly** towards the customer. Technology can play a pivotal role in fostering closeness with the customer, which is something that every organization wants and can use to differentiate itself from the competition.

Every CEO voices the mantra of “Know your customers and serve them well,” but how do they make it happen? The whole company has to get involved and focused—especially marketing, sales and customer service. These are the three functional groups, known collectively as the Front Office, that are first in line to interface with the customer. The way to move the company

closer to the customer is to apply technology to the Front Office, and the best place to start is in the sales department.

Automating the Sales Department

Part I is an overview of the positive changes that technology can impart to the sales team. The team is an important concept because modern field salespeople rely heavily on the support organization around them.

Sales automation is a **tool** which has the potential to produce a significant increase in sales for the salesperson together with the company, organization, or enterprise. Actually, the word *significant* is not strong enough; good sales automation solutions produce *dramatic* increases in sales. But there are caveats. Sales automation products differ a lot in capability, and a successful roll-out of automation across the company takes a lot of commitment from everyone.

Automation for the sales team is inevitable. Every company will eventually get there. It's as certain as the adoption of the network, the notebook computer, and the word processor. Companies have started to realize this, and have decided that if they don't provide their salespeople with computers, they will buy their own (maybe with dangerous consequences). But the toughest issue is how to do automation right, since it is so easy to do it wrong.

Proposition

Sales automation done right blends technology with techniques.

The overall premise is that to harness technology for the selling process, the traditional established techniques of selling need to be translated to a form that can be understood and utilized by the computer.

Technology

The technology that propels sales automation is based on computers, networks, and the application software that makes it all tick.

After the personal computer established itself in business, PC networks followed closely behind. Networks assist people to work in teams, no matter how far apart they may be. Sales teams can be scattered across thousands

of miles and different time zones; some are on the move and others are tied to the office. In the past few years, a new type of software dependent on networks has enabled teams to communicate and collaborate freely. Sales automation comes alive when it runs on this kind of technology. The ability to exchange ideas, information, and strategies in real-time, makes the sales team more efficient and competitive. Add the potential of the largest network of all—the Internet—and we throw a whole new light on the possibilities of automation. The Internet’s capacity to reduce communication costs and to provide universal accessibility is now well entrenched in business.

Application software is the “stuff” that makes the hardware come alive. We see later that there are two ways to sell better. One is by freeing up more time to sell, and the other is by becoming more skilful. Only with the right application software will we achieve the compound benefits of **efficiency** and **effectiveness**.

This book describes exactly what to look for as you embark on your search—features, frills, and ideas that determine if the sales automation solution is done right.

Techniques

The thread that weaves throughout *sales automation done right* is that technology alone is not enough. Sales automation should incorporate established techniques that are rooted in the process of selling.

Techniques (*selling techniques*) are the time-tested maneuvers, strategies and tactics that ensure the best chance of winning the sale from the competition. We are not talking about fancy new sales systems, but rather the traditional *proven* rules of selling. However, there’s a twist. We need to adapt, refine, and tune “tried and true” selling techniques to leverage the enormous benefits of technology in assisting the sales process.

Salespeople must know *unambiguously*, “Is this a lead or an opportunity?” “Am I starting to prove too early?” “Where am I in the sales cycle?” “Should I try to close this sale before the competition gets in ahead of me?” True sales automation integrates an appropriate sales method directly into the software that makes the answers to these issues clear.

A Foundation Built on Sales Methodology

There are two compelling reasons for sales automation to be built from the ground up using a strong sales method.

The first is to immerse the sales force in a “best practice” selling culture by embedding that culture in the productivity tool that they are all craving for—the computer. Regular sales training is not practiced as much as it should be. Every so often, sales managers will put their teams through a sales course. Then what happens? Everyone forgets to practice what they’ve learned. The methodology has to be *in-their-face* every day. What better way of achieving this than to have the sales methodology infused within the software? The software plays out the method and the method is in sympathy with the software. This way, salespeople get *constant reinforcement* of the basic skills of selling.

The second reason is to provide potential for the computer to *proactively* assist salespeople in their everyday selling, meaning their use of true selling skills. Unless the computer *understands* the sales process, this kind of functionality is impossible. This idea is explored in great detail in later chapters, in a way that is new to the arena of sales automation. It will be controversial, especially with salespeople set in the old ways because there will be a large focus on the absolute fundamentals of selling, which they will claim to be thoroughly familiar with. Unfortunately, most people learn sales by being totally immersed in the process before they are ready. Sure, they pick up the essentials, but usually in a fairly haphazard way. Then they move on to more complex instruction on tactical sales which they are required to layer over this imperfect foundation.

Sales automation done right restates the fundamentals of selling in order to build a sales method that’s totally compatible with the computer. This is a method that will unleash the extraordinary power of the computer to provide a better way to sell.

Sales Automation—A Definition

Everyone has a different idea of what sales automation really is. That’s because just about any software that’s been given to salespeople has been tagged with the “automation” label. To some, it is the ability to provide a multimedia presentation on their notebook computer. To others, it is a way to send

customers birthday congratulations by e-mail. A manager may see it as the best way to get a consolidated roll-up of the forecast each month. For each definition there are twenty others. However, there is a common thread based on the beneficial use of technology in everyday selling. Sales automation is a catchall phrase that pulls together all sorts of ways that technology can make the sales team sell better. But it helps to have the definition tightened up a bit.

Sales automation: The application of technology to assist in the efforts of selling, indirectly and directly. Indirectly, by improving the salesperson's **efficiency**, and directly, by improving the salesperson's **effectiveness**.

Well-designed sales automation always brings improvements in efficiency to the sales department. But automation must take account of many differing requirements ranging from workflow processes to building a library of knowledge about interactions with customers. All too often, attempts to automate are shoe-horned into place using inadequate tools. Once the process is started, there is often reluctance to go back and start again. The end result can be chaotic and counter-productive.

Sales automation *creates efficiency* by moving away from the traditional paperbound methods of doing things. You can't share information quickly using paper. The only answer is to get rid of filing cabinets and move strategic information onto a digital storage medium. Critical customer information becomes easily accessible to all interested parties in the organization. Going digital makes all business processes electronic, providing easier, cheaper and more accurate customer transactions. These are the *indirect* benefits of automation, and they create efficiency.

But there is another important angle to explore. Can technology make the salesperson more effective? Can there be a fundamental improvement in the true skills of selling, measured by the all-important won/lost ratio? Yes, technology does have the potential to deliver, but, everything has to align for this to happen, and if it works, the rewards are beyond belief. To get it right, salespeople should have confidence in the technology and they must believe in the underlying sales method that drives the automation. Every time it's used, the computer reinforces and teaches the best practices of selling—it *understands* the sales process! Seems far-fetched? But this is exactly what *direct* benefits of sales automation are all about.

Points to Remember

1. Automate your sales force *now*. The competition is already doing it!
2. Build on a strong sales methodology platform using proven principles of selling.
3. Don't just settle for the *indirect* benefits from increased efficiency. Find a solution that also brings *direct* benefits.

CHAPTER 2

Direct and Indirect Benefits

The split personality of sales automation

The terms **direct** and **indirect** benefits have been coined to describe two quite different but equally important aspects of how sales automation impacts the sales team. Indirect benefits have as much influence as direct benefits; you have to have both. Indirect benefits are discussed first, as they are the ones that most good sales automation solutions offer. The same is not true of direct benefits—that’s why most of this book is about technology that improves sales effectiveness.

Benefits are indirect if they don’t *directly* assist the salespeople to make better use of selling skills. Instead, they work by freeing up more *time* to sell, and providing more support for the selling process. Indirect benefits reduce two major distractions that preoccupy salespeople and defocus them from face-to-face selling: **communications** and **administration**. If these background support processes are reduced, more time can be made available for direct contact with the customer.

Unfettered communication across the entire organization is essential for a competitive sales team. If communication is difficult, selling strategies have less chance of getting implemented properly. There can’t be excuses like, “I thought you knew,” or “Didn’t you get that message yet?” Getting the message through quickly and accurately makes the sales team more nimble and keeps them ahead of the competition. Today, e-mail is the communication tool of choice for customers. Seamless electronic communication should be viewed as a core indirect benefit of successful sales automation because it

moves knowledge easily to any part of the company. Successful sales teams need to share information quickly.

Sales administration can get overwhelmed with the management of **lists**: customers, accounts, appointments, products and prices. The early use of computers in business focused on management of lists using database technology. The first successful list-management software application for both personal and business use was Contact Management. Contact Management software provides the ability to store important details about people (contacts) and the interactions that have occurred. In business, important contacts are *customers*. Contact Management applications were the forerunners of today's Customer Relationship Management and Sales Force Automation technology.

Moving lists to the computer creates efficiency, but only if it is done right. Cutting down the number of disparate lists and putting the information in *one place* where everyone has access to it makes life easier. Unfortunately, Contact Management software has been so universally adopted in early attempts at automating sales that users have stretched its capabilities.

Getting work done by moving it through specialized workstations is called **workflow**. Tasks are broken down into manageable pieces, each of which can be handled at one desk. Once completed, it's passed over to the next desk, until the task has been finished. A simple example is processing a sales proposal. The *salesperson* prepares a rough draft of what's needed and sends it to an *inside sales assistant* to work up a formal proposal. The proposal is passed over to *sales administration* who produce the final document, attach product literature, and send the package to the customer. This requires effort by three people in three departments. If one person gets bogged down, the process freezes. The old way of doing workflow is to move paper around the company. Paper is a *nuisance*. It proliferates quickly, is slow to move (because *people* have to move it), and no one knows what to do with it. Sales automation gets rid of paper by moving information electronically. If the electronic process slows to a snail's pace because of a people problem, the computer flags the crisis and demands a change.

Aside from eliminating paper, electronic workflow also gets the job done faster and more accurately. It's best to apply rules to the workflow, such as "You can't do that until you have done this." Instituting rules ensures cus-

customer information is up to date and complete. For example, “You can’t make a proposal for this customer unless their key information is in the database, and if it isn’t, then you must put it in!” If workflow is electronic, this rule is easy to implement. *Sales automation done right* provides many examples where devising sensible rules and sticking to them ensures accurate information, which is something that the customer respects and demands.

The Essential Indirect Benefits

Here’s a list of what’s needed to apply all the indirect benefits:

- There must be a network. Layered over the network should be effective messaging within the company. Messaging makes communication and collaboration happen. Communication is either “one to one” (send a message to one person only) or “one to many” (send the same message to more than one person). This is easily accomplished by regular e-mail. Collaboration is “many to many” communication; information is put where people can view, add or edit if they need to. This happens through a **shared database**. Examples are sales discussion groups, including the latest news on the activity of the competition, the latest industry gossip or personal stories from the front line on how to win the sale.
- The network solution must remove the constraints of geography (distance) and time. Access to information has to be available for the whole team. When Head Office has gone home for the day on the East Coast, the West Coast salesperson is logging in today’s events on the computer. This information can then be accessed at Head Office in the morning. The Internet has revolutionized twenty-four hour accessibility to information.
- Salespeople on the move should have the capability to disconnect from the network and work with their data offline. Later they can reconnect to home base, pick up new material and send back anything they have contributed since being disconnected. The technical name for this mutual exchange of data is **synchronization**. Good synchronization technology also resolves conflict issues when two people may unknowingly edit information at the same time.

- Every time someone in the company interacts with the customer, the essence of the interaction must be recorded in a central database accessible by the sales team.
- Workflow should be automated. Business processes must be made electronic with the goal of streamlining and the *elimination of paper*.

These challenges are focused on improving the salesperson's ability to work efficiently, especially gathering, storing, and disseminating information. The impact of indirect benefits can be huge. If they can be made to work, one part of the equation of sales automation is solved. The other part—how sales automation directly benefits the sales team—is next.

Direct Benefits of Sales Automation

Sales automation has been around for a long time, but without much emphasis on using technology to make the *sales process* come alive. Maybe there's been too much focus on indirect benefits. After all, that's the easiest place to start. **Direct** benefits of sales automation exploit the computer's potential to understand how salespeople sell. When this happens, the computer can provide *proactive* assistance in the sale, dramatically improving *sales effectiveness*.

Sales methodology is central to the vision of the direct benefit. All too often, established sales methods invented in the days before the PC have been translated directly into digital space, which is not much better than using paper forms to manage the sales process. There needs to be a fundamental re-think on how to bring sales methods into line with modern technology. The computer is intensely logical—it is happier crunching billions of numbers in a fraction of a second than trying to figure out why a salesperson is having a tough time in a sale. But if the sales method recognizes the computer's natural disposition towards numbers, it's much easier to derive the direct benefits of automation.

In fact, salespeople are embroiled in numbers much more than they realize. At any time they may have fifty to one-hundred open sales opportunities each at a different point in the sale. Each position in the sales cycle calls for appropriate selling skills. Opportunities differ in their *value*, which determines the attention they get. Value depends on many issues. With the right sales method, it's possible to assign *numeric* value to factors that make up the parameters of the sale. Invariably, the salesperson works it out in their head

and uses their gut feel to determine the way to proceed. Sometimes it works, and sometimes it doesn't. It's much better to let the computer do it.

Sales methods crafted for the computer impart some **intelligence** to the technology; the computer takes on an *understanding* of the sales process. The seasoned salesperson will say, "The computer can't teach me how to sell!" This is certainly true if we consider the "Art of Selling," but in the case of the "Science of Selling," things are quite different.

Proposition

Selling is both an art and a science. To be successful, the salesperson has to master both.

Yes, there are two quite different facets of sales success—one, salespeople are born with, and the other, salespeople (and the computer) can learn.

The Art of Selling

Successful selling depends heavily on interpersonal skills. Salespeople who find it tough to relate to customers will find it very difficult to sell. A large part of the art of selling depends on the *individual* salesperson and what makes them tick. But the art of selling also involves the ability to build talent from experience. It takes years to become consistently successful at sales. There's nothing better than losing a few orders to teach vigilance for the future.

The art of selling is built upon the mostly inherited, but partially learned skills of relating well with people, coupled with wisdom developed through the many trials and errors that occur over a sales career—technology can't help much here. The art of selling gives the salesperson the ability to "read" the customer and to know what they are thinking during discussion. Salespeople who have this flair definitely have an edge, even before their true *selling skills* are put into play.

Although technology hasn't yet developed to the point where it can improve the salesperson's art of selling, in the case of the science of selling, it definitely has.

The Science of Selling

The science of selling is a virtual rulebook that describes how to handle a sale, specifically, where certain skills and strategies should be employed, and to what degree they should be used. These rules have been compiled and refined over many years by sales professionals. They are applicable across a wide range of selling situations and have been tested exhaustively to prove that they work.

Here are a few examples of the rules:

- Every sale has a defined start and finish that together define the sales cycle.
- Each phase of the sales cycle needs emphasis on a particular selling skill.
- Effective sales strategies need an understanding of the competition, even when the *only* competition is the situation of the customer doing nothing.
- Don't try to prove the worth of your solution to the customer until you have established that they may need it.
- Don't try to *close* a sale until the customers have been given enough information to allow them to comfortably make a decision.

There are many more of these rules. Notice that they are of the type, "This is what you *should* or *should not* do at this point." Also notice that the rules need not be exact—that's OK, they are still rules. Some of the rules are industry-specific, but most are general enough that they can be applied to all types of selling. Mastering the rules can only be accomplished by gaining experience with them.

The most successful salespeople master both the art and the science of selling. If the computer helps with the science, the salesperson has more time to devote to the art.

E²—Compounding Direct and Indirect Benefits

Why E squared? Because **efficiency** and **effectiveness** work together as a potent combination to drive sales up. Take a simple example:

The sales automation project is well under way, and after a diligent effort to get the *indirect* benefits in place, there is a 20% improvement in *efficiency*. This means that a salesperson who could previously handle 100 sales opportunities per year comfortably, can now deal with 120. If this team is good, they can turn one out of two opportunities into booked business (their won/lost ratio is 50%). Before automation they achieved 50 sales. After automation they win 60 sales because of the increase in efficiency.

But, what if there is also a 30% improvement in effectiveness? There are 30% more sales that are won. The won/lost ratio goes from 50% to 65%. Out of the newly increased available 120 opportunities, the team now wins 78.

Summary:

Before automation	50 sales
With 20% increase in efficiency	60 sales
With 30% increase in effectiveness	78 sales

Sales have improved by 56%!

This example, although presented simply, shows exactly what can happen in practice. The only barrier is getting the *sales automation done right*. There are many examples of companies that have seen this kind of improvement and even better. However, they are not too eager to divulge all the details to the competition, and that's why there is more news about failed projects.

Be assured that the ideas presented in this book have evolved from direct experience of running a company over a ten year period of intense growth, which was made possible only by the remarkable results of E squared.

Proposition

Effectiveness on top of efficiency produces dramatic increases in sales. It's the same as compound interest in the bank account.

But that's not all. Believe it or not, streamlining processes and removing paper result in a *decrease in costs*! It takes someone's time to move paper around from desk to desk, and to file the stuff when the job's done. Consolidating random communications into a streamlined electronic workflow also dramatically reduces costs previously incurred by old style methods of mail, courier, fax and phone calls. The same can be achieved with less. Not only is

there a reduction in wasted effort, but the same team will be able to handle the extra work brought about through growth in the business.

Points to Remember

1. Interpersonal skills of selling are primarily inherited rather than taught.
2. There is no substitute for experience when it comes to strategizing a sale.
3. There are well-defined rules that can be applied to the selling process *and* which can be understood by a computer.
4. Finding time to work on more sales opportunities *while* improving your chances to win them is a potent combination.
5. Costs go down when a good sales automation product is successfully implemented into the sales organization. Increased sales coupled with decreasing costs make a compelling reason to automate

Sales Methodology

What's the point of definitions?

Sales automation done right is a blend of technology and techniques. By techniques, we mean selling techniques which are part of an overall **sales method**. A method is a *prescribed way* of doing something in accordance with a particular theory. The method involves a set of rules that everyone uses.

A sales method is a recipe for conducting the sales process. It is well defined, and can be written down. For example, “Here is a set of criteria you must use when you convert a lead to an opportunity.” Teaching a sales method means teaching the rulebook on the science of selling. The science of selling *can* be taught. In fact, every rookie salesperson will, at some time, be taught the basics of selling either in a formal sales training course, or directly on the job from the experienced sales professional.

A way to ensure that the sales team is up to speed on the essential skills of selling is to make the sales automation and the sales method so intertwined that they become inseparable. Actually, *if* sales automation is done right, there won't be a choice, because the sales method must be there to get the direct benefits. This is a win-win for the sales team. They use the computer to make them efficient, and at the same time, the computer constantly reinforces the sales method that makes them more effective.

Implementing a sales method across the entire sales organization drives a degree of consistency that benefits the company as a whole. It's good to know that customers are getting the same view of the company from all of

the front line sales team. Salespeople analyze their sales opportunities in exactly the same way and use the same set of proven selling skills. If everyone grades their sales opportunities using identical criteria, the job of forecasting gets easier and the forecast becomes much more accurate.

Definitions

The rules discussed in the previous chapter, under The Science of Selling, are an important component of a sound sales method, but there is also one other.

Proposition

A successful sales method relies on a series of well-understood *definitions* that can be used to describe all aspects of the sale.

A definition is the precise meaning of a word or phrase. Direct benefits of sales automation hinge on teaching the computer about the sale, which cannot be done if issues concerning the sale are poorly defined. The computer and the salesperson have to work hand-in-hand; a well understood method with a set of clear definitions can make this happen.

Definitions are part of the theoretical framework of the sales method. For example, differentiating between the terms **lead** and **opportunity** is critical for consistent lead qualification, yet salespeople often use these terms interchangeably. The problem gets worse if the computer is expected to assist with the qualification. There has to be unambiguous definitions of all stages, activities and conditions surrounding the sales process.

A good example of ambiguity is the word *customer*, which has universal usage in sales. The sales team sometimes refers to an organization as a customer, or a person as a customer. In sales automation, this is too vague. Either the computer is not expected to understand the term, or the term is made completely unambiguous through a much tighter definition.

Definitions will crop up repeatedly as we get into the description of a proposed sales method. The reader should put them into the context of their personal selling experiences. As an example, here are three important definitions that occur later in the book.

Sales cycle: The time between the customer contact starting the buying process and the time a decision is made to purchase.

Lead: An interest expressed in a product or service by the customer contact.

Opportunity: The chance that the customer contact gives a salesperson to sell a product or service.

Points to Remember

1. Keep the sales team tuned into the skills of selling by providing them with sales automation that is built from the ground up with a solid sales method.
2. Determine the underlying definitions of your sales method and ensure that both the computer and sales force thoroughly understand them.

CHAPTER 4

SFA and CRM

Not the same thing

A book on Sales Force Automation (SFA) would not be complete without a discussion of Customer Relationship Management (CRM). Unfortunately these two terms are often confused and sometimes used interchangeably—even by the experts. SFA and CRM are closely intertwined, but are *not* the same thing.

Chapter 2 defined SFA as using technology to make the salesperson more efficient and effective. Technology is an essential part of the definition of SFA. However, CRM was originally a *vision* of how businesses should develop a new closeness to their customers. Throughout the extraordinary growth of the CRM industry in the past ten years, the defining vision of CRM has become entangled with the issue of the technology needed to realize it. This is purely a matter of definition, but it is important for anyone in business who is considering a CRM project to clarify before they go ahead.

CRM is not exclusive to the sales department because it applies to *every* part of the organization. It involves a process that works toward a perfect partnership between the supplier and the customer, one that is founded on *collaboration* and *trust*. Achieving the goal of CRM only happens if the maintenance of this relationship is a lifelong mission.

We'll see that SFA and CRM share some important components, but the central thesis behind SFA, which is increasing sales effectiveness, reaches outside of the meaning of CRM.

CRM—A Vision of Doing Business

CRM is a **philosophy** which attempts to ignite everyone within the company to focus their efforts toward the goal of customer intimacy. Someone in the company should be evangelical about the benefits that CRM can bring, and must have authority and determination to force the belief of CRM into every corner of the organization.

Proposition

The two defining elements of a successful CRM strategy are process and knowledge.

Building relationships with customers can't happen unless the customer likes and wants your product. Product doesn't just mean the goods or services in the price-book—it also encapsulates the way business is conducted *before* and *after* the sale is made, that is, the entire **customer transaction**.

The customer transaction encompasses finding the customer, satisfying their needs, and building lifetime loyalty and commitment. Successful Customer Relationship Management demands that all the processes in the company that move the customer transaction within and between departments are seamless, efficient and effective.

The more companies understand the people they do business with, the more they can customize their approach of doing business. How often does the customer buy something? What are their preferences or tastes? Does the customer take time to evaluate competitive products, or do they prefer to deal with a well-trying and proven vendor even though the cost might be higher? The only way to answer these questions is to collect information over time about all that happens between anyone in the company and the customer. That word *anyone* is important as it means that all groups or departments in the company share in the responsibility of reaching the CRM goal.

Therefore, an indispensable byproduct of the CRM philosophy is a complete history of all of the *interactions* between the company and the customer; a complete store of knowledge that defines what has happened in the past (good or bad), and one that sets the benchmark as to what should happen in the future. We call this bank of information the **Customer Knowledge Store**. The Knowledge Store must be regularly reviewed, updated and re-

newed to reinforce the CRM vision. It is only useful if people have access to it, which means that its information must be freely available across the whole organization. If this happens, the exact needs of the customer can be *predicted* and the product can be *customized* to match, which is one of the core objectives of CRM. The idea is to be sufficiently close to the customer to know what's important to them. Once this happens, supplier and customer can enjoy a much more rewarding business experience.

CRM Technology

The basic idea behind managing customer relationships is as old as the hills, but the term CRM is relatively new. Today, CRM is almost universally understood as meaning the **technology solution** that helps achieve the customer relationship vision. Why? Because technology can really make that vision come true, especially when it comes to process and knowledge.

Networked computer systems are the best enablers of process. They also provide the platform for communication and collaboration so that everyone knows what the other is doing. But managing the Customer Knowledge Store is where technology really shines. Information Technology and Knowledge Management are technology tools that pull information from far and wide within the organization—information that holds the knowledge about the customer. Technology not only makes it possible to store vast amounts of data efficiently, but also to break it down into data subsets that aid in customizing services and products to better fit client needs.

Front Office and Back Office

Front Office is a term used for the functional groups of a company that have the most direct contact with customers, most obviously marketing, sales, and after-sales service. The people outside of the Front Office are in the Back Office. Back Office groups are those that process the customer's transaction inside the company. They include manufacturing, inventory control, shipping/receiving, or support teams such as finance or IT. Associating CRM technology with just the Front Office is misleading, but that's the way the CRM industry has evolved. It doesn't matter how well marketing can find a new customer, or how well sales can persuade the customer, or how well service can care for the customer if manufacturing cannot make the product in

a reasonable amount of time. *Everyone* is responsible for meeting the demands of CRM.

The Back Office teams have had technology to help them for years. The benefits of making the Back Office more efficient are much more visible—costs go down, product gets out quicker, and profits can be easily tracked directly to action taken. For this reason, business has found it easier to spend money on the Back Office than the Front Office. Now that the Back Office has been computerized, many companies are looking to see if it is possible to harness technology to serve the Front Office. However, the problem is different; you need another kind of technology for Back Office than for Front Office. The Back Office is concerned with directly processing the transaction between the company and the customer. We are dealing with number crunching here—numbers that show lead times, inventory levels, profit, losses and much more. However, the Front Office deals with textual rather than numerical data. This is information on our relationship with the customer. What was the last conversation that the salesperson had with the customer concerning the proposal for their latest project? What went wrong on the last preventative maintenance visit by the service department? Is the customer prepared to act as a reference for the support that has been provided? What is the content of the last mail-piece that the customer received on our newest product, and did the customer send in the return slip?

A good example of the unique requirements of Front and Back Office is the way accounts are allocated. The accounting department almost always sets up accounts according to the customer's payment locations. This account designation may have nothing to do with the way the sales department needs the accounts to be set up. The sales department is more interested in breaking down customer organizations into convenient groups that they can market and sell to. For small customer organizations, the account designations for Front Office and Back Office may be the same, but for large customers they are typically quite different. Customer contacts also tend to be different; the Front Office talks to buyers and users, whereas the Back Office talks to the administrative structure of the customer's organization.

So, we really do need two different technology solutions for Front and Back Office, although that does not mean that the two systems should not talk to one another. The premise of CRM, as we said, is to drive everyone

from both Front and Back Offices to be customer focused. For this reason, there has to be sharing of information between the two. It is not within the scope of this book to explain how this can be done, but suffice to say, it is best to find the “best of breed” solution for each domain, and make the job of connecting the two systems a separate project. Does all information have to be shared? Of course not. There is such a thing as “information overload.” The Customer Knowledge Store needs sufficient information for everyone to make the CRM vision work. Each group—sales, accounting, or manufacturing will have their own Knowledge Store needed to complete their part of the customer transaction. The Knowledge Store will have a subset of this data for everyone to share, enough to piece together the full story of the current relationship with the customer.

If we take a close look at how the customer’s transaction is processed between the Front Office departments, we will begin to see the how CRM and SFA are related.

The Front Office CRM Process

Finding customers, selling them product, and maintaining the quality of the product after the sale is made, are responsibilities of the Front Office organization. Ideally, there is a smooth process flow between the three core departments of marketing, sales and service. Figure 4-I is a diagram showing the essential steps.

Note the words that define the Front Office CRM process: POTENTIAL—**Identify**—TARGET—**Market**—LEAD—**Qualify**—SALES OPPORTUNITY—**Win**—NEW CUSTOMER—**Nurture**.

For the product or service that we are selling, there is a POTENTIAL number of customers out there that could buy it. From that potential, we **identify** a TARGET group of customers to whom we focus our **marketing** efforts. Through our marketing, we produce LEADS—indications that we have contacts who might be interested in buying from us. Leads must be **qualified**, and if the interest from the contact is genuine, we have discovered a SALES OPPORTUNITY.

Everything in the CRM process to this point comes under the mandate of the marketing department. That is, marketing scours the available market, promotes the product and service and finds real opportunities for the sales

department. Whether or not your company is big enough to have a separate marketing department doesn't matter; whoever is fulfilling the process above is wearing a marketing hat.



Figure 4-1: The Front Office CRM process

Marketing then hands over the sales opportunity to the sales department, whose job it is to convince the customer that the product is best suited to their needs. The goal is to **win** the order and create a **NEW CUSTOMER**.

Notice that we show only one step in the CRM process that is devoted to sales. Even so, this step is the most important one in creating success for the company. This is the part of the process that is driven by sales automation technology.

Proposition

Sales automation is at the core of the CRM technology tool and has the potential to provide the most business reward.

CRM doesn't work unless you have customers. CRM alone won't ensure a steady flow of customers, so we need the sales department to contribute their special skills to make this happen.

Once the sales department has signed up a new customer, the service team must **nurture** the customer throughout the lifetime of the product or service that was purchased. What comes after the sale is made is as important as what goes before it. The customer must be happy with the buying decision in order to come back again when the need for a replacement or new product arises. When this happens, they are considered a POTENTIAL purchaser for new product. If they buy again, they become a repeat customer. One of the foremost benefits of a well-implemented CRM process is being able to keep existing customers, as well as create new ones. That is why we refer to the Front Office process diagram using the long-winded title of **customer acquisition and retention loop**. It costs a lot for the company to find a new customer, but it costs much less to retain an existing one, and this is why CRM technology is enjoying so much attention.

Where SFA Fits In

The whole CRM process loop can be automated with computer technology. Indeed, there are products that focus on just the automation of marketing, or sales, or service, but most automation vendors offer products that focus on the complete customer acquisition and retention loop. Here we have to be careful when we evaluate the part that focuses on sales. Sales automation delivers on two distinct fronts: one of which is CRM related, and one that really isn't. When you choose a product, you may have to decide which is of greatest importance to you: winning the sale or enabling your CRM vision. Unfortunately, it's all too easy to pick something that does one or the other well, but not both.

Proposition

The expectations of SFA are twofold: (1) To contribute to the development of knowledge about the customer's relationship with the company and (2) To bolster the critical CRM process step of winning the sale.

The key to understanding this is recognizing that some people think if you know your customers well enough and are zealous in preserving your relationship with them, you will always get the sale. That's not necessarily the case because we are overlooking the issue of "How well can you sell?" (we're

back to the familiar territory of the direct benefits of sales automation). An overriding objective of sales automation software should be to assist in closing more sales through directly improving the ability to sell.

Yes, one important focus of sales automation is to record information that is needed for the Customer Knowledge Store. Salespeople have to be one of the best sources of this information as they are on the front line when it comes to customer contact. But sales automation was first introduced as a way for salespeople to close more sales rather than as just a building block of the overall CRM vision. Then sales automation got drowned in a frenzy of big business adopting the “customer intimacy” theme. The original idea, centered on making the salesperson more *effective* took a backseat. Fortunately, there is now a swing back to the core objective of SFA. Sales teams everywhere are demanding tools that offer the promise of sales improvement in the most defining sense; bringing in more sales because of superior selling skills.

Good SFA delivers on both counts. It is a major contributor to the company’s CRM initiative and a driving force in building sales effectiveness, which leads to a recurring theme.

Relationship or Opportunity Focused?

Companies that believe that good customer relations are all that’s needed to produce sales organize their sales teams accordingly. Their salespeople become account managers, nurturing people and organizations in a well-structured way. We refer to this style of selling as being **relationship focused**. Other companies however, home in on the sales opportunity, emphasizing the importance of discovering it early and using carefully planned strategic approaches to stay ahead of the competition. Here, the emphasis is on using true selling skills. This style of selling is **opportunity focused**. Which way is right? They both can be, but *sales automation done right* encourages a mix of the two. Some might say that the ability to work well and relate with the customer is a selling skill, but in fact, it is a distinctly different skill than the one required for competitive selling. The best salespeople have the ability to use both relationship oriented skills and raw selling skills; they adjust the blend of skills according to the need.

Interactions between the salesperson and the customer are important in building the substance of the Customer Knowledge Store. In any interaction

with the customer, salespeople can show different degrees of relationship and opportunity focus, and according to the time and the place, one focus will win over the other. When that happens, we must be sure to recognize that the intrinsic nature of the interaction has dramatically changed. Interactions that predominantly involve relationship focused selling are called **relationship focused interactions**. Ones that heavily depend on the opportunity focused style are referred to as **opportunity focused interactions**.

Later on, Chapter I4 shows how *characterizing* customer interactions according to the relative use of relationship building skills or basic selling skills is essential to *sales automation done right*. You can't separate the idea of CRM from the skills of selling, but the salesperson's job is made that much easier if the customer respects their company and product. A good sales automation product will be mindful of one central tenet of the CRM philosophy, and that is to monitor the company's success or lack of it in serving the customer. Opportunity focused interactions are the heart of SFA, and relationship focused interactions are central to CRM. In fact, without the idea of the opportunity focused interaction, *sales automation done right* would be hard-pressed to define the sales process (more on this in Chapter I4). The definition of CRM in terms of *process and knowledge* applies equally well to SFA, but process takes on a much more significant meaning in the context of sales process. What goes on in the sales process occupies over fifty percent of this book.

The Sales Team

High customer expectations combined with more complex products makes it impossible for the salesperson to carry out the sale alone. Companies are now seeing that selling is a **team** effort, and that nothing beats the strategy of *sending out the team* to win customers' confidence in the product. The heart of the team is the salesperson and their manager, but at some point, we need *specialists*, the product experts, and the people who understand the myriad of customer requirements that may necessitate customized configurations. The customer service team may also be needed in some pre-sales strategies. Inevitably, the team, and not the sales representative alone, forge and implement the strategy of winning the sale.

Proposition

Sales automation reinforces and assists team selling.

Why is that? Because sales automation empowers and encourages discussion with every member of every team. Developing and tuning sales strategies on-the-fly is much easier if everyone has up-to-the-minute information on the dynamics of the sale. Moving faster than the competition makes the difference between winning and losing. The automated sales department will be way ahead of the pack.

Politics

Even though companies have flattened their organization structures, **hierarchies** are still there, especially in the sales organization. But salespeople are getting less nervous about managers looking over their shoulder. Soon, the idea of the sales force (**Us**) and sales management (**Them**) being at odds with each other will be obsolete. Both parties are striving to sell as much as possible.

Proposition

Sales automation breaks down hierarchical structures by making information available to everyone in the company.

Bear in mind, customers are oblivious to the internal politics of companies courting their business. They are inclined to give their business to the sales teams who act with *shared enthusiasm*. Sharing information across the company is not optional, it's mandatory. Today's technology makes it impossible to be selfish with information, thereby breaking down the barriers between us and them.

The Culture of Sharing

Part of the redesigning process that a company goes through in adopting CRM is an introspective evaluation of its own internal culture of sharing. The unassuming little word **share** plays a big role in CRM, and by default, sales automation. Making information freely accessible across the organization is one of the major indirect benefits. Sharing is something that many people find difficult to do, and often, a major shift has to occur to make it happen in business. Sharing is OK when we need to use material that someone else has contributed, but what if we have to share our own hard-earned knowledge around the team? The answer is, "Get used to it," because without

the sharing of information, the sales *team* can't function. The central theme of this new technology is that *sharing is in*. There's no reason to hide stuff anymore—it's all there for the team to share and use. Everyone must adapt and reap the rewards.

Salespeople still get a bad rap for protecting their territorial rights and the information they uncover. It's taking a long time to dismantle the adage, "Information is power." The sales team has to understand that information is only powerful *if it is shared*. Salespeople regard the idea of sharing with trepidation. After all, they are encouraged to run their own show with their own territory and accounts. They maintain their own sphere of influence, and, if the *numbers* are OK at the end of the quarter, everything is fine. Salespeople develop a protective stance about anything belonging to their "turf" and won't share any more than is necessary about what's happening. This is one of the most common reasons that sales automation projects fail. Previously, *not sharing* has been easy to do because the technology that makes it easy and transparent to do so simply was not there. Now, things are different.

New ideas about creating closeness to the customer (CRM) make it a requirement that all customer interactions are kept, and the knowledge be made accessible to everyone across the organization. This is the way to provide exactly what the customer wants. Marketing can tailor its campaigns to customers with similar interests. Field Service can measure their success (or failure) with ensuring the customer's long-term commitment to the product. This is only possible if the database can tell us about the customer, what they want most and how they feel about us.

Salespeople are in the enviable position of being nearest to the customer, and they must be the mouthpiece of the customer. If this information is not collected, warehoused, and studied, there will be serious holes in the company's understanding of the customer—something that can't be tolerated given that the company is committed to the vision of CRM.

Successful organizations get close to their customers and are passionate about it. Technology can be used effectively in this mission, but technology is only the enabler. There must also to be a culture of sharing built on everyone's understanding that *they* can contribute an important "piece of the pie."

Points to Remember

1. CRM and SFA are not the same. SFA is a technology tool that automates the sales department with the principle goal of increasing sales effectiveness. CRM is a philosophy that stretches outside the scope of sales into all other parts of the organization.
2. Beware of the distinction between SFA and CRM when you are putting technology to work in the Front Office. Don't neglect the enormous potential of SFA to improve the sales team's closing rate. This can happen if you select a CRM product that has an inadequate sales component.
3. If your company is moving into team selling, sales automation will provide a tool to energize your team and coordinate their efforts.
4. Sales automation breaks down cultural and hierarchical barriers by supporting and encouraging sharing of information.

Customer Knowledge Store

Reaping the benefits of past efforts

The previous chapter stressed the need to record information on every aspect of the way business is conducted with the customer. When this information becomes suspect—inaccurate, dispersed or difficult to retrieve, we have the first signs of trouble, and there is no hope of pushing the CRM vision forward. The lack of a Customer Knowledge Store, or a Store that is not trusted, is the first call to arms to institute CRM technology. There comes a point in a company's growth when the need to consolidate the storage of strategic information becomes evident. The warning signs are the proliferation of inadequate, duplicated data and the inevitable frustration of the people having to deal with it.

Disconnected Databases

An unavoidable result of the way in which companies evolve is that important information gets scattered and strewn around the organization. Growth is always accompanied by the formation of functional groups, each with its specific expertise in getting a part of the operational process accomplished. It is natural that a certain degree of autonomy develops in these departments. They are jealous of the information they have accumulated and sometimes reluctant to share it. They start to *hoard* data about their dealings with the customer, and the result is **multiple disconnected databases**.

Usually, an individual group decides how and where they will store the information. Accounting may use their Back Office computer system, marketing may use a separate relational database, sales may rely on paper in file cabinets, and service may use a spreadsheet. It sounds like a mess, and often it is. It's obvious that this process leads to uncontrolled duplication, and unfortunately, the first thing to suffer is the accuracy of the knowledge about the customer.

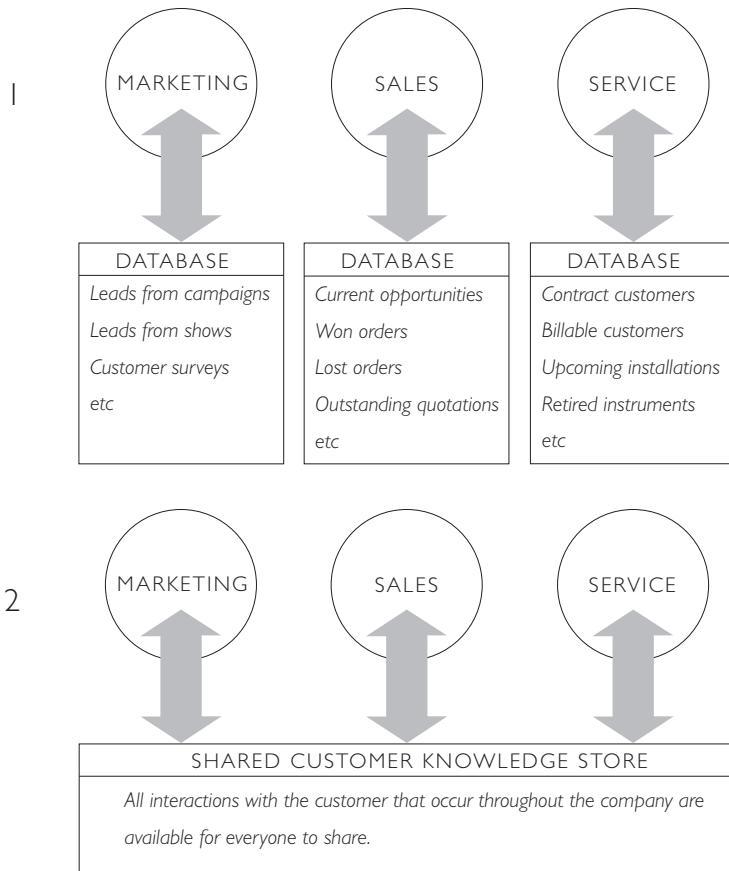


Figure 5-1: Reducing multiple knowledge stores to just one

Consider an example of a small company in this dilemma. The marketing department has a central list of potential customers stored for use in generating leads. The sales department also has a list of active customers in

the process of buying a product—the all-important “opportunity” list that drives the forecasting process. Moving on to after-sales service, this group should be keeping information on customers who own the company’s products. In addition, there are lists of support requests, warranty commitments, or service contract customers. The company has at least a half-dozen different places where information on customers or potential customers is stored. The left hand does not know what the right hand is doing. Inevitably, the customer suffers! Figure 5-I shows the problem.

Figure 5-I (1) shows the situation just described, where marketing, sales and service keep their own store of information about the customer and there is no direct sharing of knowledge. To get information, you walk from one department to another and ask for it—if you know that it exists there. As the organization matures, these disparate pockets of information grow out of proportion, and it becomes more and more difficult to dig down for historical data that could assist in making current dealings with customers more effective.

When a company is at this point, they are in a lot of pain. The problem becomes obvious to everyone who needs access to *complete* information to help them service the customer transaction. Waste and inefficiency creep in, but also a recognition that something needs to be done about it.

Things change in Figure 5-I (2) of the diagram, after the implementation of CRM technology. Information is gathered from all over the organization and stored in one place for everyone to share. First, all the critical data is taken out of the filing cabinets and put into a standard electronic format, with no exceptions company-wide. If necessary, information is downloaded on a regular basis from other departments’ databases into the common shared database. Everyone who needs the information has the means to access it whenever and wherever they want.

There are “out of the box” technology solutions that make this process straightforward and cost effective. There is no excuse, not even, “We can’t afford it.” The truth is, you can’t afford not to. Even the smallest of companies have to quickly recognize when they are in the multiple disconnected database mode, and get out of it as quickly as possible. Not doing this will mean waste, frustration, and cost.

What Information Do We Keep?

What information is of such strategic importance that we need to keep it? This is an important question to get to grips with before implementing a CRM system. The answer is to keep all the information about any interaction between the company and the customer which contributes toward fulfillment of the **customer transaction**, an idea first discussed in the previous chapter.

The customer transaction is driven by the process at the center of the customer acquisition and retention loop. How did marketing find the customer? How was the customer qualified? How did the sales process progress? How long did it take to deliver on our promises? Does the customer like our product? Would the customer buy from us again? Each question needs a host of information to qualify its answer. In addition, notice that we need to assemble data from both Front and Back Office. To gauge how effectively we delivered on our promises, we need to know things like, Did the customer's order get held up by a credit check? Did manufacturing run out of a critical part which slowed down delivery? We also need to know the answers to other issues that impact our future business, such as, did the customer pay the invoice on time?

Even though the Customer Knowledge Store has to be filled with data from all parts of the organization, the heart and soul of the Store should reside in the Front Office. Part of the reason is that if you look at the CRM process as linear, the start of it resides with the marketing and sales departments. These are the people who first find the customer and log the essential information: name, address, organization, business likes/dislikes, account, sales territory, and much more. This is the start of a lifetime effort to store the data on that customer. The marketing and sales departments also have to review and maintain customer information, and they are best qualified to do it.

Information can be put into the Knowledge Store directly, or can be downloaded from an external source (be careful here, it first has to be "cleaned;" someone should review it for accuracy before it goes in). The field salesperson will directly enter the core information on an important visit with the customer. Statistics on accounts or individual contacts can be entered automatically at set time intervals. Remember, the idea is that anyone in the company who needs the "big picture" should have the relevant data at

their fingertips. Some data will be confidential and only available to a certain few, so security is an issue with the chosen technology.

Making the Information Accessible

The Knowledge Store is not useful if people can't use it. Everyone can get access to it by employing technology. Perhaps the greatest mark that technology has made on business over the last ten years is to provide effortless access to information without constraints of any kind.

The Knowledge Store is located in one place (a server computer) under the control of whatever technology infrastructure exists—the IT department or whoever has been “put in charge” of technology. People can work directly off of the central database, or they can remotely connect to it and view only the information they need. The key here is that the information is stored and secured in *one* place, and everyone uses it there, or they *copy* off the piece that they need for their contribution, later to restore it with any additions or subtractions they have made to it. This process is **synchronization**, where any changes made on the same piece of data by more than one source are automatically reconciled by the software.

The Customer Knowledge Store has to be viewed by the company as one of its most critical assets, and one that should be jealously protected. In multiple disconnected databases, strategic company information is insecure. Nowhere is this truer than in the sales department.

If we are in *multiple disconnected database* mode, each one of those disconnected databases is sitting on the hard drive of an individual salesperson, so be warned. If the salesperson moves on to a different company, your information goes too. Why? Because the salesperson thinks of your information as their own! This happens all the time, but companies are still slow to wake up to the fact that if they leave the information storage decision to individual team members, they are at great risk when someone breaks away from the team. The only thing to do is to make sure that if the information is taken, you have a copy of it. If the information is shared, then the only risk is that a part will be lost. Make sure that it is not the only copy.

The problem gets compounded if there's no universal format to store the data. One salesperson uses ACT!, another uses their own design in Access, another uses Outlook, another uses their DayTimer; this is a recipe for di-

saster! If the sales team allows an individual member to do their own thing, the potential risk is that they lose all customer interactions over the work history of the salesperson in question—ouch!

There is no other answer than a common database, a common format and a mandate of sharing. That word “sharing” has come up before, because it is essential in establishing the CRM vision through technology. Let a user copy or replicate the information that they need. If they later decide to leave the company, it’s difficult to stop them from taking their copy, but nothing is lost; it still resides safely in its central location.

The Information Has To Be Accurate

Information that cannot be relied upon is worse than no information at all. It is surprising how companies put a lot of energy and resources into creating a central library of information, only to have it populated with bad data. Once bad habits set in, it’s tough to turn things around. The only way to roll out CRM is with clean data. Yet most people are so anxious to get going that they flood the new database with a rushed import of information from the old system. Once the database is clean, conscious effort should be put into ensuring data integrity.

The easiest way to move large amounts of existing data into a new database is through an automatic download. Unfortunately, this taints the new information store with the sins of the past. There has to be some manual cleansing before the moving process. This is achieved by putting the new data into quarantine, in a separate database, and then letting someone check it for validity before allowing it into the Knowledge Store.

The whole concept of customer knowledge is founded on building *accurate* information. It’s an insult to the customer to record their personal details incorrectly. The worst examples involve names being misspelled, or getting genders wrong. Nothing will turn off a customer quicker than referring to them as Mr. instead of Ms. Limit the number of data entry points and use rules for inputting data. For instance, important information such as organization name, telephone number, address, etc. should be entered by a select few. There will be resistance from those who think that their liberty is being threatened, but after a while, when everyone sees the benefits of clean data, the issue will go away.

When the company gets big enough, it's best to bite the bullet and get a dedicated database manager. It's more of a question of reallocation of efforts than extra expense. A good custodian of the database will ease the pain for everyone. The thing about good data is that it is *reusable* and eventually becomes trusted. If you capture correct data once, the software will make it available over and over again with the click of a mouse.

Don't forget the other wonderful benefit of automation—process. Institute automated processes and you reduce the risk of a contaminated database. How? *Sales automation done right* makes the electronic processes mandatory and won't let anyone circumvent them through the back door. If a salesperson wants to send a proposal to a new customer, the rules won't allow the process to go forward unless the detailed contact information has been put into the database. Automation will ensure that the rules are enforced, while passing the process through human hands is not so certain.

Points to Remember

1. The Customer Knowledge Store is a strategic asset of the company and it should be guarded with appropriate security.
2. At the start-up of a new CRM project, take steps to avoid inheriting bad information from previous years.
3. Sound database management and effective processes are needed to keep the Customer Knowledge Store clean.

The Four Waves

Which wave are you on?

Hopefully, Part I has made a strong case for automating the sales force and has persuaded the reader that SFA is a worthwhile business investment. But before embarking on the project, let's see how the trailblazers and early adopters fared, and learn from their experience.

Most companies that have functioning sales automation systems got there the hard way, a natural evolutionary route that follows the same pattern. Looking back, they would probably agree that there are faster and more effective ways to achieve the same end. This route to automation is invariably driven by **reaction** to business pain, felt because of frustration from inadequate or non-existent processes. When a pain develops, the tendency is to quickly throw something at it to achieve a quick fix.

The process of reacting to perceived barriers leads to four distinct phases of growth toward a technology solution. We call these phases the **Four Waves**. In this chapter, we see that progressing logically through the Four Waves is not the way to go. It's best to take some shortcuts, but to do this, it is essential to recognize what the Four Waves are, and on which wave you are currently riding.

From Paper to Power

What are the start and end points in the drive to embrace technology into SFA and CRM processes? The *start* is no technology at all, in other words,

paper. This is Wave One. The *end* is everything that is described in *sales automation done right*, and is Wave Four. In Wave Four, technology drives all the customer facing processes, *and* contributes to a real effort for skills improvement in the sales force. The Four Waves run the gamut from “Paper to Power,” from antiquated paper-based record keeping to efficient and effective sales automation based on a solid CRM platform.

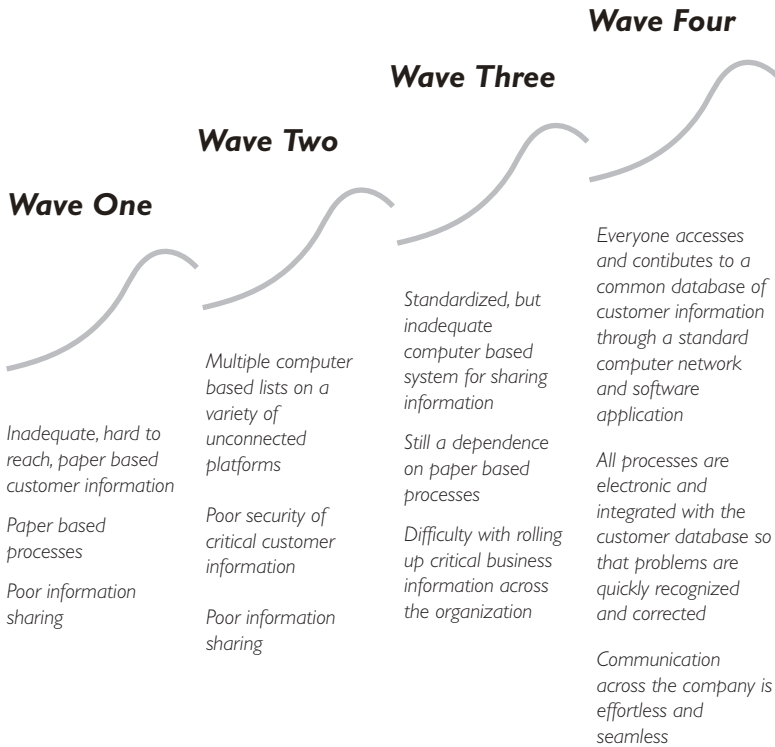


Figure 6-1: The Four Waves—moving technology into the sales department

Only in Wave Four does the company achieve the full benefits offered by diffusing technology throughout the sales organization. This doesn't happen overnight. Even so, it's best not to be deterred by the seemingly long road ahead. It is possible to jump one or more waves at once and the faster we can get to Wave Four, the better.

We've discussed the importance of rallying the entire organization behind the goal of customer satisfaction, and the role technology can play in

bringing the team together. Each of the Four Waves is a reflection of how successful the company has been at integrating technology into the daily life of all employees.

Technology is a major theme of the Four Waves, but technology alone doesn't get us to Nirvana. The Four Waves model takes into consideration the importance of sales methodology, which is the blueprint for the sales business. After all, some of today's best sales methods were developed before computers became available. Technology and methodology go hand-in-hand as you move through the Four Waves. The methodology must evolve alongside the technology, and they must complement each other well.

Wave One—Buried in Paper

The first attempts at SFA and CRM focused on paper to manage *lists*. This had to be the case because at that time, computers were not available. Unfortunately, some companies still rely on paper lists, but hopefully not too many. The lists are ubiquitous; lists of customers, opportunities, quotations, service calls, so on and so forth. Very few people know where all the lists are. They are certainly on paper, but the paper could be anywhere in the building. It becomes a real chore to get good information out of the lists, and even more difficult to share the information throughout the company. Inevitably, this system leads to gridlock and everyone gets buried in paper and file cabinets. The result is less efficient service for the customer, making the company less competitive.

Proposition

If you are making custom boots for a client list of twenty-five, paper is OK. Unless you plan to expand, stay in Wave One and relax.

Otherwise, you could not be in a worse condition; you are living in the dark ages. Wave One is a dreadful place to be, and it can bring down good businesses that now have to compete with companies that have progressed into Waves Two, Three, and Four. The best advice to those in Wave One is to move out now, and hop two steps while you are at it!

Wave Two—Move Lists to Computers

Salespeople start using computers in Wave Two, most often using Contact Management which is low-cost and serves their immediate and personal needs. All too often, individuals make their own decision on which software to use.

The first thing that happens is that customer information lists are moved from paper onto the computer. Each salesperson keeps their own customer list and there is little sharing of information with the company. As the salesperson can configure the software any way they like, it's impossible for the company to impose rules on data validation or cleanliness. It is also tough for the company to enforce expectations on *which* information it needs to be recorded. The more successful the salesperson, the more they are able to do it *their* way, which goes counter to any company's long range plan to build a Knowledge Store of all its involvement with the customer. Wave Two inevitably results in the accumulation of *bad* customer data.

Companies in Wave Two don't yet have their departments talking to each other electronically. When someone else in the company needs the information, they have to rely on paper, fax, or phone to obtain it. Obviously, this isn't the most efficient way to get things done. It's especially problematic for remote employees who are working directly with customers. When front line staff can't get customer information back to Head Office quickly, the customer suffers.

In Wave Two, when a salesperson leaves the company, they take all the knowledge stored on their computer with them. Any information they've taken will have to be manually reconstructed from old paper records, which have hopefully been left behind. That's no way to run a business in the 21st century.

Proposition

Wave Two is treacherous; precious customer information is neither safe nor under your control. Who knows where that information is? It's dispersed, duplicated and probably inaccurate.

Make sure that if you have made it to Wave Two, you skip Wave Three and go directly to Wave Four. If you are thinking of going from Wave One to Wave Two, forget it. In many ways it could be worse.

Wave Three—Share Files

In Wave Three, the company takes steps to remove some of the pain that they experienced in Wave Two. First is an effort to standardize the software that salespeople are using on their computers. Often, the company goes with the flow and chooses the software that is most preferred by the sales team. Here the loudest, most persuasive user will get their preference chosen, and this is not the best way to implement a mission-critical piece of technology. The Third Wave company will probably go forward with the technical tool that has been used in Wave Two, which will lead to awful compromises.

The next step in the right direction is to try to synchronize the information generated by the sales team into one central file. At least that way, if someone leaves, a copy of their data resides at head office. This roll-up process is usually a headache. Many issues involve timing. Who edited the information last? Is it up to date? Who is acting as referee on which version is correct? And the information is not usually delivered in real time because the roll-up process is not effortless. Hopefully the company in Wave Three has a network with e-mail and Internet connection, which will make the file synchronization process easier.

Wave Three companies are making solid efforts to share their information and keep it secure. However, they are not yet automating their processes. Workflow still happens through the movement of files from one desk to another, and there is no linkage from Front Office to Back Office.

Proposition

In Wave Three, people share the same database, but making changes to it across the organization is difficult. Wave Three is dangerous, and companies can languish here before realizing that it will never work.

In many cases, it has taken a lot of sweat to get to Wave Three, and because of that, there is little incentive to go further. That's a shame because the

technology infrastructure could already be sufficient to support Wave Four. There is no point in delaying.

Wave Four—Nirvana

In this wave, the company reaps all the benefits of technology. At the heart of the system is a Customer Knowledge Store of strategic customer information which is secure from theft. The Knowledge Store provides an accurate picture because everyone contributes to it and it is carefully maintained. There is a sharing culture within the company; people recognize that they can't go it alone, and that they need the team. Information is freely shared, and no one hoards.

Characteristics of Wave Four are tightly integrated *electronic* communication and collaboration capabilities. No matter where or when, salespeople can retrieve or contribute information on the customer. They have the means to easily share their experiences.

Backing up the effort is a workflow process that does not rely on paper. Because it is electronic, it is easy and self-regulating. If the workflow gets bogged down, flags are raised. The customer's transaction flows through faster and with fewer mistakes and this makes people happier about what they are doing. The result for the salesperson is that there is more time to spend with the customer.

Wave Four companies have also implemented the *direct* benefits of sales automation. Their salespeople are better than the competition because they sell to an agreed-upon and respected sales method, backed up with assistance from their computer.

Proposition

Once you are here, you will wonder how life was possible in earlier Waves.

The only place to be is in Wave Four. All good companies are trying to get here and recognize why they must do it. But it isn't easy and many get stuck along the way. How fast is business moving through the Waves? That's difficult to say, but generally, slower than expected.

Fighting the Waves

After evaluating which wave your company may be following, you may wonder what everyone else is doing. In 2001, we conducted a survey on a sampling of over one thousand companies in North America within the small to mid-market segment. The total number of companies in this target group was estimated to be 220,000. Executives were surprisingly open in their expression of the pains that they were encountering in the sales organization. This study reinforced the validity of the Four Wave model in its representation of the effort to solve the fundamental issues within the Front Office under the challenges of growth. Here are the results:

Within the target group, 10% of companies were in Wave One, 60% were in Wave Two, 13% were in Wave Three, and 17% were in Wave Four.

The 10% figure for Wave One represents 22,000 companies that still manage their sales teams through paper processes. Since 2001, one would hope there has been a massive exodus out of Wave One, but that's probably not the case. Small and mid-sized businesses are missing out on one of the most powerful and cost effective ways to boost bottom line profitability.

Points to Remember

- I. Take stock of where you are now and choose the shortest path to reaching Wave Four.

Glossary

There are many definitions scattered throughout *sales automation done right*. This glossary throws in a few more, along with examples that are framed specifically from the point of view of the salesperson. Making a short, all-encompassing description of what a word or few key words should mean is tough to do. As I've learned in my years of designing SFA and CRM solutions, there will be controversial elements in some of these explanations. But then it is up to the reader to look at other reference material to formulate their own ideas. That can only help foster a better understanding of the concepts.

ACCOUNT

An account is a logical grouping of people who work for a common organization and therefore, have shared interests. The account is designated by the Sales Manager to be conveniently targeted by the sales team with a planned sales strategy. Account Management is one of the four core competencies of the management of selling.

Example: "My Sales Manager gave me a new account. It's a new division of Image International Corp, whose Baltimore group have been good customers of ours for years. This new Buffalo division should need at least twenty Industrial Copiers to get started."

See related topics: Contact, Sales Cycle, Territory.

ACTUAL SALES CYCLE

The actual sales cycle is the amount of time that the salesperson has to sell their product to the customer. It is the time between the salesperson discovering the sales opportunity and the time that the customer awards the business to the successful vendor.

Example: “I could kick myself for not visiting Global Diodes more often. I’ve learned that they want five High Speed Printers, but the competitors have been working on the requirement for over three months. I’ve only got a month to show them we have a better solution.”

See related topics: Average Sales Cycle, Buying Process, Customer’s Sales Cycle.

ART OF SELLING

The art of selling is the salesperson’s ability to secure a sale through their natural skills at communicating, building relationships and engendering trust.

Example: “I’m in good shape. I get on really well with the purchasing agent at Global Diodes, after working on our relationship for the past year—we are both avid sports fans. I know that he will give me the business if it comes to a tie.”

See related topics: Relationship Focused Interaction, Science of Selling.

AVERAGE SALES CYCLE

The average sales cycle is the most probable length of time that it takes for a salesperson to sell a given product or service. The sales team will only be able to derive the average sales cycle through experience of many sales opportunities over a period of time. There will be deviations in the average sales cycle (shorter or longer) because of abnormal influences on the customer’s usual buying process.

Example: “It usually takes six months to sell a Type 560 printer, but this customer already has five on the shop floor, and they are pressured by workload. We’ll see this one go through in a month.”

See related topics: Actual Sales Cycle, Buying Process, Customer’s Sales Cycle.

BACK OFFICE

The Back Office is, collectively, the departments or functional groups in the company which are essential to the successful operation of the company,

but are not regularly in direct contact with the customer. These could be finance, manufacturing, development, inventory control, shipping/receiving and others.

Example: "I rely upon my manufacturing group to consistently produce a good product. Otherwise, I would find my sales commitment tough to fulfill."

See related topics: Front Office.

BINARY SALES FORECAST

A binary forecast is a prediction of future revenues by the sales team that is determined on a decision of which actual sales opportunities will be sold, rather than taking some form of average or weighted summation over a number of possible sales opportunities.

Example: "I'm including the GDPN deal in my binary forecast for April. Even though the Welland deal could close that month, I'm not sufficiently confident to include it, but it will show up in my weighted forecast."

See related topics: Sales Forecast, Weighted Sales Forecast.

BUYING PROCESS

This is a process that most customers use to purchase a product or service from start to finish. The buying process proceeds in three distinct stages: recognizing the need, evaluating solutions, and negotiating value.

Example: "A customer called for information on our new series of printers. She thinks she will want one for her new production line, and is in the early stages of researching what's available. She'll want to try out her own protocol on a selected few before coming to a final decision."

See related topics: Sales Process.

CLOSE PHASE

The Sales Model defines the Close Phase as the final phase in the three phase sales cycle in which the dominant skill used is closing. In this phase, the salesperson and the customer work together to negotiate a mutually agreeable value proposition that hopefully leads to a successful conclusion for the salesperson. The other two fundamental skills, probing and proving, are used to support the closing effort.

Example: “We’ve finally shown how our printer will do everything they need. They should have enough information to go ahead. We’d better start finding out if there’s any reason for them not to place an order.”

See related topics: Close Skill, Probe Phase, Prove Phase.

CLOSE SKILL

The fundamental skill of closing is the ability of the salesperson to uncover any barriers that prevent the customer from placing an order, and to overcome those barriers such that a decision can be made.

Example: “I think all the objections to making a decision have been answered satisfactorily. I overcame their concerns about budget by working out an extended payment plan reaching into their new fiscal year—we should get the order.”

See related topics: Close Phase, Probe Skill, Prove Skill.

CONTACT

A contact is a person who could buy your product or who may influence the decision to buy your product. Contact Management is one of the four core competencies of the management of selling.

Example: “Ms. Corning is the one with the immediate need for an Industrial Copier and is directing the sale, but she won’t buy without consulting her associate in Baltimore. I also think the purchasing agent will have a say in the matter.”

See related topics: Account, Sales Cycle, Territory.

CRITICAL INTERACTION

A Critical Interaction is an opportunity focused interaction that occurs within a sales cycle. Strategies and tactics designed to win the sale are played out in Critical Interactions with the customer. Critical Interactions are most often two-way, but can be one-way.

Example: “I sent the buyer our final offer which showed a 5% discount and an extra year of warranty.”

See related topics: Customer Interaction, Non-Essential Interaction, One-Way Interaction, Opportunity Focused Interaction, Relationship Focused Interaction, Two-Way Interaction.

CRM (SEE CUSTOMER RELATIONSHIP MANAGEMENT)

CRM PROCESS

The CRM process is the process that governs the smooth flow of responsibilities between the three Front Office groups of marketing, sales, and service, in their ongoing efforts to find customers, sell them product or service, and maintain their level of satisfaction.

Example: "I'm glad that marketing are still targeting the GDPN organization even though they are one of our loyal and trusted customers. Every so often a new manager is hired, who has had no experience of our products, and we need to make sure they get to know who we are quickly."

See related topics: Customer Acquisition and Retention Loop, Customer Relationship Management.

CUSTOMER ACQUISITION AND RETENTION LOOP

The customer acquisition and retention loop is a closed loop multi-step process diagram that shows how a new customer's transaction is passed between marketing, sales, and service in a CRM system. In this case, the customer transaction encompasses everything between learning about a product, to becoming a lifetime user, and potentially a repeat customer (hence the loop).

Example: "This is the third generation of Industrial Copier that GDPN has purchased. I'm pleased that Smith's vision of providing lifetime value and service is paying off."

See related topics: CRM Process, Customer Relationship Management.

CUSTOMER INTERACTION

A customer interaction, or simply, an interaction, is any event in which the company touches (relates with) the customer, regarding mutual business relationship.

Example: "I met with the purchasing agent of Lexington, and they seem set to go ahead with our offer. I'll enter this into the CRM system so everyone can share the news."

See related topics: Critical Interaction, Non-Essential Interaction, One-Way Interaction, Opportunity Focused Interaction, Relationship Focused Interaction, Two-Way Interaction.

CUSTOMER KNOWLEDGE STORE

The Customer Knowledge Store is the company's bank of information about all the dealings that have occurred with the customer in the past, good or bad. The Knowledge Store is a historical database of all interactions between the company and the customer.

Example: "I looked back at what had happened with Lexington two years ago when Brad had that account. Brad was very close to the customer, but was suffering from the bad performance history of the old Type 520. I think that stuff is still haunting us."

See related topics: Customer Interaction, Customer Relationship Management.

CUSTOMER RELATIONSHIP MANAGEMENT

Customer Relationship Management, or CRM, is a way of doing business with a focus on creating a long term relationship with the customer, such that the customer is more inclined to offer continued business rather than seeking competitive solutions. As such, this definition does not imply any connection with technology. But the term CRM has grown to mean the computer-based networking and software applications that make the closeness to the customer more easily achievable.

Example: "We've been doing business with Lexington for over ten years, and the efforts we've been putting in with servicing their account and tailoring our product to their specific issues are really paying off. They are very reluctant to try anything from Universal, as the trust just isn't there."

See related topics: Sales Force Automation.

CUSTOMER'S SALES CYCLE

The customer's sales cycle is the time that elapses between the customer initiating the buying process, and the point at which a decision is made on which product to buy. If the salesperson is close to the customer from the very start of the buying process, the actual sales cycle will be equal to the customer's sales cycle.

Example: "Mr. Smith told me that he had been thinking about getting a High Speed Printer, and today his boss said it was a good idea, as funds were available, so he is starting to collect information. I'm glad I'm in at the start of this situation. He said he'll plan to get a unit

installed in October, so he will need to make a decision by the first week of September, which is only six months from now.”

See related topics: Actual Sales Cycle, Average Sales Cycle, Buying Process, Sales Cycle.

DIRECT BENEFITS OF SALES AUTOMATION

The direct benefits of sales automation enable salespeople to make best use of their selling skills, resulting in an improvement in the ratio of sales won to sales lost. The salesperson becomes more effective.

Example: “I checked my progress in the Global Diode sale with my sales automation system. It suggested that I need to spend more time with the economic decision maker. That is not a bad idea.”

See related topics: Indirect Benefits of Sales Automation.

FRONT OFFICE

The Front Office is the collection of departments or functional groups within the company that deal directly with the customer. Typically these are marketing, sales and service.

Example: “I see from my CRM system that the service group was out at Lexington today, and they have discovered that the customer could use another CL-250.”

See related topics: Back Office.

FUNDAMENTAL SKILLS

The three fundamental skills of selling are probing, proving and closing. Each of the three skills is dominant in a particular phase of the sales cycle. The fundamental skills are comprised of a set of lower level skills necessary to achieve the primary objective of the parent skill. In any Critical Interaction at least two, and sometimes three of the fundamental skills are used to differing degrees, dependent on the position in the sales cycle.

Example: “It’s near the end of the sale and in tomorrow’s meeting, my objective is to show the customer that my service can meet all of his expectations, in spite of this being a competitor’s account. That’s going to take all of the diplomacy (probing), product knowledge (proving), and negotiating (closing) capabilities that I have.”

See related topics: Closing Skill, Critical Interaction, Probing Skill, Proving Skill.

IBO (SEE IDENTIFIED BUSINESS OPPORTUNITY)

IBO ESSENTIALS

The IBO Essentials are three pieces of information that the salesperson uses to characterize a sales opportunity. The important parameters of Probability and Priority can be calculated directly from the IBO Essentials. The three pieces of information are “Will it happen?” “Will we get it?” and “When will it happen?”

Example: “This IBO is my best shot at booking something in August (‘When will it happen?’ is August). The customer is happy with the machines he has already bought from us (‘Will we get it?’ is High), and the need is very high (‘Will it happen?’ is also High)

See related topics: “When will it happen?”, “Will it happen?”, “Will we get it?”.

IDENTIFIED BUSINESS OPPORTUNITY

The Identified Business Opportunity is a term used in *sales automation done right* to describe the sales opportunity. Emphasis is on the fact that the salesperson has correctly qualified the opportunity as real. In the sales automation system, IBOs are given unique numbers to distinguish them from each other (i.e. IBO #2020).

Example: “After talking to marketing about their meeting with GDPN at the Print Show, I’m going to open up an IBO for a Type 560 for the GDPN Boston facility.”

See related topics: Sales Opportunity.

INDIRECT BENEFITS OF SALES AUTOMATION

The indirect benefits of sales automation enable the salesperson to work more sales opportunities by making administrative, support, and connectivity tasks much easier—in other words, by making the salesperson more efficient.

Example: “Since we implemented sales automation, doing quotations has become a cinch—no more scribbles on pieces of paper that get sent off to Head Office. Now everything flows electronically, and I can see when support has completed the quote and sent it out. It’s freeing up more time for me to sell.”

See related topics: Direct Benefits of Sales Automation.

INTELLIGENT RESPONSE TECHNOLOGY

Sales automation done right uses Intelligent Response Technology on the computer to compare the salesperson's current performance against a model of the most successful strategies used in the past. If necessary, the computer provides advice to the salesperson on changing strategies to win the sale.

Example: "I entered my best guess on the sale as to whether it would go through and whether we would get it. Then I detailed out my progress—the computer disagreed, and felt that my 'Will it happen?' was not *High*, but *Medium*. It suggested that I do more talking with the economic decision maker."

See related topics: Sales Environment, Sales Model.

LEAD

A lead is an expression of interest in your product or service, and represents a potential sales opportunity.

Example: "I got a message from the receptionist this morning. Mr. Smith from Lexington called to request information on the new Industrial Copier."

See related topics: Long Term Lead, Sales Opportunity.

LONG TERM LEAD

A long term lead is one that cannot be qualified immediately to a positive result (an opportunity), or a negative result (close the lead, the customer is not buying anything). Rather, the customer is not buying now, but there is a strong possibility that they will buy in the future. The long term lead is kept open, and the salesperson follows up regularly in order to be ready when the lead turns into an opportunity.

Example: "The service engineer called to tell me that the customer only expected an in-service life of three years, and at that time, would need to buy a larger unit. I will enter this as a long term lead."

See related topics: Lead, Sales Opportunity.

MARKETING DEPARTMENT

The marketing department is the functional group that finds potential customers, qualifies them and hands over positively qualified leads (IBOs) to

the sales department. In the customer acquisition and retention loop, the marketing department comes before the sales and service departments.

Example: "I received ten new IBOs from marketing today. They were qualified at the Los Angeles Print Show."

See related topics: Sales Department, Service Department.

NON-ESSENTIAL INTERACTION

A Non-Essential interaction has no real importance in measuring the relationship with the customer or impacting the strategy of winning the sale. As such, it need not be recorded into the CRM system.

Example: "I called the purchasing agent to check into the state of Mr. Smith's requirement, but she was not there, and I did not leave a message."

See related topics: Critical Interaction, Customer Interaction, One-Way Interaction, Opportunity Focused Interaction, Relationship Focused Interaction, Two-Way Interaction.

ONE-WAY INTERACTION

One-way interactions occur when one party contacts the other, but there is no immediate connection or response. A response may never come, if so, the interaction stays one-way. If a response comes later, the interaction becomes two-way.

Example: "I've sent an e-mail to the purchasing agent saying that we will meet Universal's warranty proposition, but I haven't heard back from them. It's been a week already."

See related topics: Critical Interaction, Customer Interaction, Non-Essential Interaction, Opportunity Focused Interaction, Relationship Focused Interaction, Two-Way Interaction.

OPPORTUNITY FOCUSED INTERACTION

In opportunity focused interactions, the salesperson's primary objective is to use true selling skills to win the sale from the competition.

Example: "The final presentation of our proposal went down well with everyone. The President said that we would definitely get the order."

See related topics: Critical Interaction, Customer Interaction, Non-Essential Interaction, One-Way Interaction, Relationship Focused Interaction, Two-Way Interaction.

OPPORTUNITY PORTFOLIO

The Opportunity Portfolio is the list of open sales opportunities that the salesperson is currently working on, and has yet to close.

Example: “Right now my sales automation system tells me I’m working on fifty open opportunities—this time a year ago, I had only thirty.”

See related topics: Sales Opportunity.

PRIORITY

The priority assigned to a sales opportunity is a measure of its importance with respect to other opportunities that need to be worked.

Example: “This is a new opportunity that’s at the start of the sales cycle. The customer heavily favors the competition, but if I leave it alone, I don’t stand a chance. It’s tough to prioritize it, as I have a lot of other situations that are about to close in which I am favored vendor. I think I’ll deal with those first and then come back to this one.”

See related topics: Probability Matrix, Priority Cube, Probability Index.

PRIORITY CUBE

The Priority Cube takes the idea of the Probability Matrix one step further by adding in another three-point possibility, which is skill phase (Probe, Prove or Close). With the Priority Cube, an opportunity has three parameters associated with it: “Will it happen?”, “Will we get it?”, and skill phase. Each of the parameters has three options, leading to a three-by-three-by-three matrix or cube, with twenty-seven possibilities.

Example: “I’m very confident that this sale will happen (‘Will it happen?’ is High), but I’m not so sure that I will win it (‘Will we get it?’ is Medium), which gives me a probability of 60%. I’m in the Probe Phase (skill phase), and I still have time to improve on this situation. I’m going to give it top priority with the hope of moving the ‘Will we get it?’ to a High.”

See related topics: Probability Matrix, Skill Phase, “When will it happen?”, “Will it happen?”, “Will we get it?”.

PROBABILITY

Probability is an expression of the chance that a sale will be won. It is most often expressed as a numerical percentage (i.e. 50%). In *sales automation done*

right, the probability is calculated from a matrix constructed from the salesperson's answers to the questions "Will it happen?" and "Will we get it?"

Example: "This sale has a fifty percent chance of us winning in April."

See related topics: Probability Index, Probability Matrix, "Will it happen?", "Will we get it?"

PROBABILITY INDEX

The Probability Index is a unique point on the three-by-three Probability Matrix constructed from the possible answers to "Will it happen?" and "Will we get it?" Each answer can be one of the three possibilities: High, Medium or Low.

Example: "'Will it happen?' is High, but 'Will we get it?' is Low." That's position 3 on the Matrix and a probability of 25%."

See related topics: Probability, Probability Matrix, "Will it happen?", "Will we get it?"

PROBABILITY MATRIX

The Probability Matrix is a three-by-three grid constructed from the answers to the questions "Will it happen?" (High, Medium, Low) and "Will we get it?" (High, Medium, Low).

Example: "This customer will definitely buy in June, and I'm sure we'll get the order. 'Will it happen?' is High, and 'Will we get it?' is High. That's position 9 on the Matrix and a probability of 80%."

See related topics: Probability, Probability Index, "Will it happen?", "Will we get it?"

PROBE PHASE

The Probe Phase is the first in a three phase sales cycle in which the primary focus of the salesperson is on the skill of probing. The skill of proving will also be used to a lesser or equal degree in support of probing.

Example: "This is a six-month sales cycle. I should be focusing on probing for the first three months."

See related topics: Close Phase, Probe Skill, Prove Phase.

PROBE SKILL

The fundamental skill of probing is the ability of the salesperson to find out everything about the customer's requirements and to discover all the issues that are behind their decision to purchase a product or service.

Example: "I've got to get to the bottom of how this decision will be made—I have a suspicion that purchasing may try to rein in the budget towards the end of the deal."

See related topics: Close Skill, Probe Phase, Prove Skill.

PROVE PHASE

The Prove Phase is the second in a three phase sales cycle in which the foremost objective for the sales team is to prove. The associated skills of probing and closing will be used with lesser degree to support the proving effort.

Example: "I'm reaching the three-quarter point in the sales cycle. Now is the time to get the customer in front of a machine to test how their application works."

See related topics: Close Phase, Probe Phase, Prove Skill.

PROVE SKILL

The fundamental skill of proving is the ability of the salesperson to provide evidence to the customer and to convince them that the solution that they offer is the best.

Example: "At the factory demonstration today, Ralph proved conclusively that our High Speed Printer could outperform Universal's demonstrator unit on both throughput and color control. He managed to shoot down all the claims that Universal salespeople were making about their demonstrator."

See related topics: Close Skill, Probe Skill, Prove Phase.

QUALIFICATION

Qualification is the process of checking that a lead has the potential to become a sales opportunity. If it is qualified positive, an opportunity has been discovered. If it is qualified negative, there is no sales opportunity, but the record of the lead can be kept for future marketing activity.

Example: "I called Mr. Smith this morning. He is just interested in what's new in the industry and does not need or even use Industrial Copiers. I've qualified the lead as negative."

See related topics: Lead, Long Term Lead, Sales Opportunity.

RELATIONSHIP FOCUSED INTERACTION

In opportunity focused interactions, the salesperson's primary objective is to measure, nourish and build the relationship with the customer.

Example: "It's been six months since the copier was installed. I paid a visit to see if the customer was still happy, and everything seems to be just fine. They would be happy to become a reference site."

See related topics: Art of Selling, Critical Interactions, Customer Interactions, Non-Essential Interactions, One-Way Interactions, Opportunity Focused Interactions, Two-Way Interactions.

SALES AUTOMATION (SEE SALES FORCE AUTOMATION)

SALES CYCLE

Measured in units of time (days, weeks, months, years), it is the lifespan of the sales opportunity. It also represents the only available time to get the selling job done. According to whether you are the customer or the salesperson, the sales cycle may be different. Sales Cycle Management is one of the four core competencies of the management of selling.

Example: "I made one of my routine calls to the Lexington facility to talk to the VP of Production. I showed him the flyer on the new Type 560, and he was thrilled. It has all the features he has been asking for. He checked his budget and he has enough funds to buy one. I think he's serious. This IBO could close in just six weeks."

See related topics: Actual Sales Cycle, Average Sales Cycle, Customer's Sales Cycle, Account, Contact, Territory.

SALES DEPARTMENT

The sales department is the functional group within the company that takes positively qualified leads (IBOs) from the marketing department and attempts to win as many of them as possible. In the customer acquisition and retention loop, the marketing department comes before the sales department, and the service department comes after.

Example: “Over 50% of the leads I’ve received from marketing in the past year have resulted in won orders. I’m keeping the service group very busy with installations.”

See related topics: Marketing Department, Service Department.

SALES ENVIRONMENT

Sales Environment is used to describe everything about the sale that will ultimately determine its outcome.

Example: “I think I’ve identified all the decision makers, but I’m not sure about the politics of this sale, and who is really driving the purchase.”

See related topics: Sales Model.

SALES FORCE AUTOMATION

Sales Force Automation, or Sales Automation, is a way to use technology to improve sales performance, directly or indirectly. Directly, by improving the salesperson’s effectiveness, and indirectly, by improving the salesperson’s efficiency. *Sales automation done right* suggests that a more appropriate definition is one that leaves efficiency to CRM and effectiveness to SFA.

Example: “Since we’ve installed a sales automation system, I’ve found it frees up more time for selling, and the built-in sales method also helps too.”

See related topics: Customer Relationship Management.

SALES FORECAST

An estimate of future sales usually provided in terms of booked revenue, but sometimes in terms of product units. A forecast is usually generated by the individual salesperson, and the manager rolls up the total across the entire sales team.

Example: “I don’t expect to book much in June, so this quarter won’t be too good, but next quarter looks as if it will be a winner.”

See related topics: Binary Forecast, Weighted Forecast.

SALES MODEL

The Sales Model is a set of descriptions, understandable by the computer, that attempt to define the ideal performance of the salesperson as they prog-

ress through the sales cycle. It is built up from four key components: time, fundamental skills, Critical Interactions, and information.

Example: "I'm about three-quarters of the way through this sale and I should be focusing on proving the benefits of my product. The next time I meet with the customer, I'm going to take my Product Manager to try to see if there are any details of the customer's application I have missed."

See related topics: Customer Interaction, Fundamental Skills.

SALES OPPORTUNITY

The Sales Opportunity is the chance given to a salesperson by a prospective customer, to offer their product or service to fulfill the customer's requirements and needs. In *sales automation done right*, the Sales Opportunity is called the IBO, which stands for Identified Business Opportunity.

Example: "Mr. Parker called to say that the old Universal machine had died, and they have an immediate need for a replacement. They will have to follow the normal tendering routine. I'll enter it into the system as a new IBO that will probably close in September."

See related topics: Identified Business Opportunity.

SALES PROCESS

The sales process is a proven, repeatable and well-established set of Critical Interactions through which the sales team implements their strategies and tactics to win the sale.

Example: "We're about three-quarters through this sales cycle, and I need to think about organizing a demonstration of the Type 560. Seeing the performance of this machine usually puts us ahead."

See related topics: Buying Process, Critical Interaction.

SALES STRATEGY

A strategy is a plan to move from the current situation to a preferred situation in the future. A sales strategy is a predefined plan to win the sale from the competition. Ideally the strategy starts at the beginning of the sales cycle and is enacted through Critical Interactions as the sales progresses. Strategy, tactics and process are intimately linked.

Example: “This is a key sale in a competitor’s account. We need to do everything we can to win this one, including offering the best price.”

See related topics: Sales Process, Sales Tactics.

SALES TACTICS

Tactics are the actions that are used to put strategies into effect. If tactics are executed successfully, as planned, then the strategy is on the way to happening. Tactics are executed through Critical Interactions and are the “hook” between the strategy and the sales process.

Example: “I know that Roger Smith is central in the politics of the organization. I’ll take him to lunch to see if he knows how the decision will be made.”

See related topics: Sales Strategy.

SALES TEAM

The sales team is the group of people whose mission is to convince the customer that their solution is better than that of their competitors. The team can comprise of field salespeople, inside salespeople, sales administration, technical support or any other group that supports the sales effort.

Example: “If Ralph from Technical Support had not come with us to the factory, the customer would not have been convinced that the Type 560 could do the job.”

See related topics: Sales Department.

SCIENCE OF SELLING

The science of selling is a set of rules that describe how to handle a sale, specifically, where certain skills and strategies should be employed, and to what degree they should be used. These rules have been compiled and refined over many years by sales professionals.

Example: “I’m about halfway through this sale, and still have a lot of proving to do with this customer—I would be stupid to try to close this now.”

See related topics: Art of Selling.

SERVICE DEPARTMENT

The group within the company responsible for all aspects of supporting a product or service after a customer has purchased it from the sales depart-

ment. In the customer acquisition and retention loop, service follows on from sales, but the CRM process flows from service to marketing, because at the end of a product's life cycle, the customer may need a replacement, and marketing must be aware of this new potential for business.

Example: "Bob from service called me to say that GDPN Boston have two of our old Type 90's that will need replacing next year. I'll alert marketing to make sure they meet up with them at next week's Print Show in Los Angeles."

See related topics: Marketing Department, Sales Department.

SFA (SEE SALES FORCE AUTOMATION)

SKILL PHASE

A skill phase is a phase of the sales cycle in which one of the fundamental skills of selling is dominant over the others. There are three skill phases corresponding to the three fundamental skills of probe, prove and close.

Example: "My sales automation system is telling me that I have twelve opportunities that are in the Close Phase. I only have two in Prove Phase and none in Probe. I need to bug marketing for some more leads."

See related topics: Close Phase, Probe Phase, Prove Phase.

TERRITORY

The Territory is the list of accounts over which a salesperson has been given the responsibility to sell their products. Territory Management is one of the four core competencies of the management of selling.

Example: "My territory was expanded today, from everywhere south of Broad Street and west of 67th, to the whole southern half of the city."

See related topics: Territory Group, Account, Contact, Sales Cycle.

TERRITORY GROUP

The Territory Group is the administrative structural organization of the territories belonging to a specific sales team. The territory group concept makes it easier to administer changes in territory responsibilities that happen through company growth or product expansion.

Example: “When Steve leaves, I get his territory, which means that I sell the IC line, and take on the extra geography of the East.”

See related topics: Territory.

TWO-WAY INTERACTION

Two-way interactions are willing dialogues between the customer and the salesperson that happen in real time (face-to-face, or on the phone), or quasi real time (e-mail, voice mail, or even fax or letter).

Example: “I sat with the customer for two hours, and we had ample opportunity to discuss how our product could solve a lot of issues in his process.”

See related topics: Critical Interaction, Customer Interaction, Non-Essential Interaction, One-Way Interaction, Opportunity Focused Interaction, Relationship Focused Interaction.

WEIGHTED SALES FORECAST

A sales forecast in which the revenue associated with each sales opportunity is multiplied by the percentage probability of winning the order. The results are then summed across all opportunities.

Example: “The Lexington deal is huge; around \$1,000,000. But at 10%, our chances are really low. That will still contribute \$100,000 to my weighted forecast.”

See related topics: Binary Sales Forecast, Sales Forecast.

“WHEN WILL IT HAPPEN?”

The answer to “When will it happen?” is the salesperson’s best estimation of when the customer will finally decide which vendor will receive their business and awards an order. “When will it happen?” is one of the three IBO Essentials.

Example: “We’ve been working at this for nine months. I am sure we will see the order two months from now, at the end of our third quarter.”

See related topics: IBO Essentials, “Will it happen?”, “Will we get it?”.

“WILL IT HAPPEN?”

“Will it happen?” is a question that tests the salesperson’s opinion on whether a sales opportunity will go through to completion. The answer to “Will it

happen?” can be one of three choices: High, Medium, or Low. “Will it happen?” is one of the three IBO Essentials.

Example: “This customer has budgeted for a Type 560 and is acting like he will get the cash, but he’s tried before and has been unsuccessful. I would say that ‘Will it happen?’ is Medium.”

See related topics: IBO Essentials, “Will we get it?”, “When will it happen?”.

“WILL WE GET IT?”

“Will we get it?” is a question that tests the salesperson’s opinion on his or her chances of winning the sale over the competition in the event that the sale goes through to completion. “Will we get it?” can be one of three choices: High, Medium, or Low. “Will we get it?” is one of the three IBO Essentials.

Example: “This division of Lexington has nothing else but Universal Equipment. The customer is happy, and I think for this sales opportunity, ‘Will we get it?’ is Low.”

See related topics: IBO Essentials, “Will it happen?”, “When will it happen?”.

WORKFLOW

Workflow is the process of getting a task completed by dividing it into discreet chunks, each of which is handled by a different person or group. When complete, the chunk is moved to the next person or group in the process. Workflow works best when it moves electronically, and not using paper.

Example: “The new system for processing orders works well. The salesperson checks the customer’s purchase order, and if it’s OK, passes it to sales administration to write up. The details then go to order entry for processing.”

See related topics: CRM Process.

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