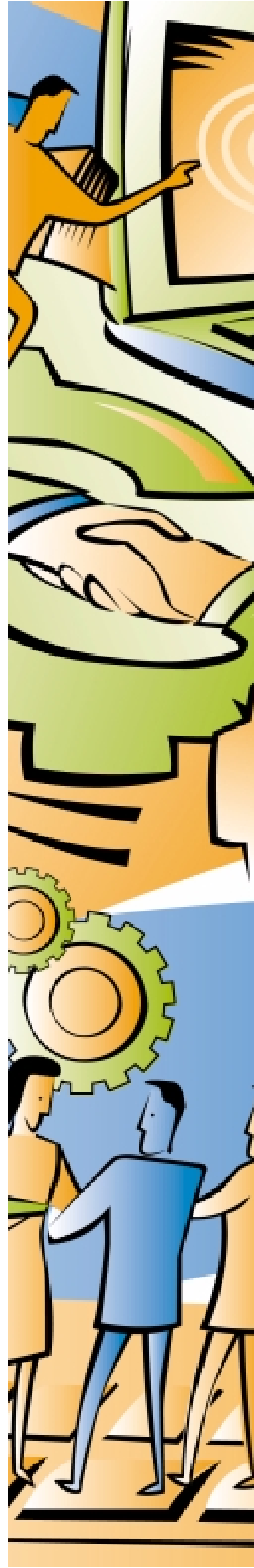
HOW TO **SIDESTEP** A
SALES SOFTWARE **DISASTER**:



Five Things Every Industrial Sales Leader Should Know

By Brian Gardner
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SELLTIS™ THE WAY YOU SEE SALES

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Customer Relationship Management (CRM) software is hot. Global spending on CRM services exceeded $19 billion last year, and that figure is projected to *double* in 2001. Adoption rates of customer relationship management (CRM) and sales force automation software (SFA) are staggering, with the number of implementations growing by 60% each year. Market leaders in industrial sales are putting team-selling software to work. It's a natural fit. Sales teams in our industry have to negotiate long, complex sales cycles, manage a large number of products and services, work with a variety of sales team members located at many different geographic locations and deal with multiple influencers on each sale at various management and departmental levels. How did we ever sell effectively without a tool to help us manage these variables?

Now for the cold water: studies have shown that only about 24% of all CRM/SFA implementations are considered successful. Fewer than one fourth. What gives? How could so much heat generate so little light? There are as many answers as there are mediocre implementations. The good news is that, as industrial sales force leaders, we can benefit from others' mistakes to develop sound evaluation and implementation strategies to immediately impact our own sales effectiveness. And isn't that what drew us to team selling software in the first place?

Here are five points to consider as you start to think about implementing your sales effectiveness solution. They are gleaned from a good deal of trial and error, a product of listening to what has worked and what hasn't. As a vice president of sales at a large industrial distributor, I marched an evaluation team through an investigation of 10 different software packages before realizing that *none* fit my specific needs or the needs of my peers. As I talk with other sales leaders and industry experts about the unique solution we developed for industrial sales teams, a few observations stand out. Jot them down, keep them visible as you deal with acronym overload, technical specifications and user apathy. Remember, it's about better selling, nothing else.

1. It's not about technology

Before you get bogged down in a jungle of jargon, keep in mind that a sales force solution should make your most prevalent pains go away. Did you leap out of bed this morning thinking "If only I had a leading-edge customer relationship management system with a distributed architecture that could…"? Nope. You were probably thinking about all the time it takes to get your reporting done. How much selling time you burned last month getting a new field rep up to speed. How many cross-selling opportunities went untapped because of a lack of visibility. How difficult it is to generate a decent sales forecast and assess your pipeline. You were thinking about what you need to do to hit your numbers in the next 90 days.

In an effective sales force effectiveness solution, the increased *effectiveness* is the star of the show, not the software.

Don't get me wrong: the technical side of the solution has to be there. I take that as a given, though. The tightness of the technical solution is a cost of entry. A great team selling solution will have the most current, comprehensive technology baked in. It will be a complete opportunity and project management tool. It will be intuitive to the user and easily share data with other programs. It will give you options for working online, offline, whatever works for you. It will be a solution that can grow along with your sales team.

Wave the red flag whenever the majority of your discussions have to do with technical matters and not sales effectiveness, though. Keep your eyes on the real prize: more effective selling.

2. Find a solution that meshes with your unique needs

What does your sales cycle look like? Are things not clicking as they should? Can outside sales, inside sales, customer service and management all easily observe and contribute to an ongoing sale? What are your biggest points of pain? What's your sales philosophy? How is that philosophy reflected in your process?

By first mapping your current sales process and the hot spots you'd like to address, you're creating immediately relevant criteria for evaluating any sales effectiveness solution. More importantly, you're surfacing the strategic importance of the front-end of the selling cycle for the key stakeholders. Getting subsequent buy-in on a tool that addresses your unique needs will be easier with every group's needs clearly established.

Then, do your homework. There are literally hundreds of sales software vendors. Pick a range of those that most closely fit your needs and then take a closer look. In one of our most successful implementations, the customer, a large industrial distributor in the Mid-West, took the time to form a cross-functional team to oversee the entire evaluation and implementation process. They created a matrix of needs based upon their own internal analysis and then evaluated over 10 different software vendors to see how they delivered against the matrix. Not only did the creation of the criteria help the group achieve consensus about their needs, it also helped them compare wildly disparate software programs on the basis of a few common factors that had strategic importance to *them*. Again, the sales needs drove the selection, not the technological bells and whistles.

Look for vendors that specialize in your industry. It's a shortcut to help you see how they solved similar problems. Ask for examples of other customers who are of similar size and have a similar sales environment. Ask your peers who they do business with. As the CRM/SFA expansion continues, more vendors will specialize in particular industry segments. Those are the players who will most likely bring more refined solutions aimed at your particular issues.

A word about customization: of course the vendor can customize a program to your needs. You could also build your very own product from the ground up and leave your own indelible fingerprints all over it. The truth is, you don't want to spend the time or the money for such a one-of-a-kind solution. You're in sales, not software. Take a close look at the system integrator and value-added reseller (VAR) fees, the on-site days, and the added implementation time any customization will entail. If a solution addresses the majority of your needs "off-the-shelf," then you're probably looking in the right place.

3. Find a solution that reflects your sales philosophy

Effective sales are driven by a well-executed method. That method grows from a philosophy of how best to identify customer needs and meet those needs. As the key tool that embodies your sales system and drives the entire sales organization, your sales effectiveness solution *must* reinforce your approach to sales.

Red flag: if you ask a solution provider about the sales philosophy his solution is based upon and he starts talking technology, run, don't walk, to the next in line.

By successfully automating your process, you'll actually be training your sales staffers every day as they use the system. Talking through the process as you evaluate potential solutions also gives you a timely reason to reassess how you're currently selling. Any adjustments to that process can be reflected in the new solution, putting any changes into effect immediately by incorporating them into the daily workflow.

4. Walk before you run

Many CRM horror stories involve ill-conceived mass rollouts, which bogged down the order process, created errors and, in some way, reduced customer satisfaction and loyalty. Don't let that happen. Begin with a tightly controlled cross-functional pilot program. Identify a small team of users who can effectively evaluate the performance of the solution and help you make any tweaks before extending the program to impact the entire sales force.

Ask your vendor about a hosting solution for the application, giving you access to test the solution without the time and money associated with buying and installing the software on your in-house systems. Again, you can focus on selling, not the software.

As you begin a full implementation, focus on optimizing key pieces of the sales cycle to isolate the impact and achieve quick wins. Quote management improvement, reporting, inside-outside sales communication. Pick the areas that most impede your current sales effort and demonstrate to the sales team and management how the system can quickly help address those particular issues.

5. Don't stop selling the solution internally

I talked earlier about the importance of creating an inter-departmental team to chart the organization's needs. The need for buy-in won't stop there. Our industry has traditionally been reluctant to move away from the tried-and-true paper-based way we've done business for years. One kick-off training session or one needs analysis meeting won't erase those habits. Sell it early, sell it often.

Document the ways the system helps your reps with reporting, with opportunities, with more accurate quoting. Sell your management team on your increased effectiveness, on the improved speed with which you can deploy a new sales person. Show them the improvements in lead and quote management. Demonstrate how you're increasing project sales opportunities. Show your principals how much more effectively you're selling their lines with the new system.

Get quick wins for the system and keep track of the numbers. Keep communicating the value. Continue to offer training and refine the process as well, visibly responding to requests from the user group in ways that enhance their personal effectiveness.

Even after you've nailed it—you've chosen the ideal solution and your sales have spiked as a result, the quest for greater effectiveness never ends. Technology continues to advance—new releases, greater capacities, new bells and whistles will constantly catch your eye. Be open to those innovations. Evolve your solution. But keep your eye on the most important elements: is this tool addressing my needs, making my people more effective, producing more sales? Whatever your take on sales force technology, the answer to those questions will always be of prime importance.

Brian Gardner, president and co-founder of Selltis, drove the development of the only team-selling software created specifically for industrial and technical sales teams after his years as vice president of sales at a large industrial distributor. Brian has helped dozens of industrial sales organizations develop team-selling solutions and speaks frequently on the topic of optimizing the front end of the selling process. For more information, please visit www.selltis.com.