

# CRM and the Sales Team

A Jargon-Free Guide to How CRM Can Develop excellence in selling



POWER TO RUN YOUR BUSINESS

sage

# CRM and Your Business

**Customer Relationship Management had been a factor in sales teams for a considerable time now. Often it is introduced as contact management or salesforce automation or possibly as the departmental filofax. One thing it has never been, though is extremely popular amongst salespeople.**

Salespeople, as we know, are a breed apart. The responsibility for delivering the all-important number is on their shoulders and anything that complicates that is a negative. Poorly delivered IT systems that inevitably bring with them a data entry component and reporting structures that are not always best received. Often the problem lies with the lack of perceived benefits. If the data remains poor, if the reporting is no easier, if the data entry takes longer and the system doesn't work on the road then any user is going to revert to using Excel and a business card on a roller-deck.

The intent of this document is simple: to show how, in the real world a CRM system can make the lives of salespeople, their teams and their management a little easier and make the nebulous process of selling a little more transparent, repeatable and therefore profitable. It's not a philosophy for selling, it's not going to tell you how to organise your team or how you can be all you can be. It is an attempt to specify the improvements that can be delivered by individuals and teams and managers with the introduction of a well-realised CRM system.

To speak to someone at Sage about how CRM systems can help sales teams after reading this document call us on 0845 111 9988.

## Build sales on better data

Where a full-feature CRM system is invaluable is in the ease with which it allows you to capture this data against a company or individual. Any system ought to be flexible enough to allow a variety of data types specific to your business or industry to be captured and for this data to be aggregated or collated to provide meaningful and useful business advantage.

Working with a consultant on the CRM project, a baseline requirement needs to be a data cleansing and enhancement element hand-in-hand with a process that allows for the ongoing maintenance of this data. It is still a requirement of will on the part of the company however to maintain this excellence. This is most easily achieved through building the system in consultation with the users so it is as user-friendly as possible and therefore encourages data maintenance.

Maintaining accurate, up-to-date data should be a pre-requisite of any sales organisation that wants to function efficiently. But we know for a variety of reasons that this is not often the case. Data gets old; companies are acquired and incompatible data comes with them; resources are dedicated to other functions; a difficult to use or time-consuming sales system does not encourage proper data entry.

What a CRM project offers is an excellent opportunity to review, clean and enhance data. There is zero point in introducing a new system only to fill it with the same data. 'Rubbish in, rubbish out' is how system administrators politely refer to this phenomenon. Data enhancement here is critical: working with the marketing and sales management team to identify what can be added to the data records that will show a propensity to buy anew or re-buy from your company or those customers likely to buy complementary products and services. This is the first step towards better selling.

## My calls, my diary, my information linked at last to allow for focused selling

The number one frustration for any sales person is the amount of time spent not selling. Searching for data, compiling call lists, updating statuses – these are not immediately commission-generating activities. Yet we know we need to do them or structuring a sales campaign becomes impossible. A good CRM system will still require input from a salesperson.

But imagine this: I can generate a list of all companies in a certain area (or who use certain products, or who have not bought in some time or whatever you have recorded in your data really). This list pre-populates my diary with the primary contacts and the number I need to call. It provides a dynamic link to all the historical and current information a user needs about a customer. And of course this information can be easily updated on-screen. As a manager I can select a longer call list and distribute it amongst all of my desk-based sales or marketing employees. The key point is that all of this is extremely easy to do; so easy in fact that there is no point in taking a short cut or avoiding use of the core system.

A good CRM system, that is technology designed to improve the working day of a sales person, encourages use through making it more difficult not to use the system. Once use is encouraged and adhered to the level of knowledge within the system and therefore the company increases all the time. As a parallel to the concept of "ease-of-use" this could be described as "value-of-use" where the user perceives the system as being productive to use as well as simple to operate. Better information, better profiling, more focused call lists equal more sales. This is a virtuous cycle that strong CRM develops within an organisation. The opposite is often true though so if your organisation displays signs of negative behaviour (system avoidance, poor processes, and poor data) it is time to re-assess and talk to a CRM consultant or vendor.

## I report: therefore I manage?

Having established the importance firstly of data, and secondly of ease-of-use and “value-of use” in a CRM system then the next challenge is reporting. Reporting on everything. How many leads were generated from an activity? How many converted to opportunities? How many of these converted to sales? What is the current forecast? What is the probability to close?

There is no end to the activity and revenue reporting that a company might need from sales and sales management in order to gauge the health of the company. Furthermore, within the sales group there are vital health-check reports needed to measure how well the company is doing against target.

With a well-implemented CRM system there what has been a chore should become an opportunity. The standard health-check reports can be defined and automated at implementation. Assuming the data and ease-of-use guidelines are being complied with this will provide instant “temperature checks” on your business. Lets repeat that; the reports that now take up days and many late evenings of sales managers’ lives to are now run automatically and retrievable at any time with minimum effort.

So with the chore removed, the sales organisations can be looked at. For example in a telesales organisation, which is the most productive employee? In field sales, who is managing the most face time with prospects? Who, individually, has the best lead conversion rate? What are marketing telling you the most successful campaigns have been? How much talk time are people managing in an organisation?

There are all sorts of best practices, top Performers and outstanding conversion rates going on within sales organisation that goes unrecognised. The reverse is also true with individuals coasting or hiding and failing to contribute. As a manager there is no doubt that these high and low achievers can be found at quarter and year-end but are things discovered in time to corrector learn rather than reward or punish? Equally is there a level of depth in the information that might not be obvious from revenue figures? Is someone able to elicit higher value per customer than others are and if so how? Is it better practice to get a customer through the door at any value and upsell later? Being freed from the mundanity of spending considerable time and resource on producing again and again the same report with the same information there comes now the ability to be creative in how activity and results are measured and rewarded.

## Forecasting

Beyond reporting the next challenge that any sales manager typically faces is likely to be forecasting and targetting. It is a far from exact science yet we have to plan the budgeting of our businesses around it. Nothing makes this process exact but what makes it at least predictable is timely information. What a good CRM system will provide you is a collective “roll-up” and view of each quota whether that quota is held by an individual - a branch - a unit - whatever way an organisation is set up to report on numbers. One important note is that this is not a replacement for a financial system. This can be integrated but a finance system looks, by definition, at historical, committed data.

For forecasting there is an element of forward looking – what a person thinks will be the likely sales over a period. A good CRM system will allow a sales manager to adjust these numbers based on his or her belief of the likelihood of closing, the stage of various deals (this can be automated), historical trends, knowledge of an individual’s tendency to be optimistic or pessimistic. Adjusting for all these factors allows a manager to arrive at a committed, dynamic number that can be reported to the business as a whole.

## The Mobile Office

There are no workers more mobile than the sales person. The Blackberry or other mobile device and mobile phone are the essential pieces of equipment. However let's not forget the laptop as a mobile device with the advent of affordable broadband data cards that allow for real time access to data resources in the office.

Let's be realistic about what's needed on the road – the limited screen size and practicality of use on a mobile device probably pre-supposes only limited information is desired on this device. A CRM system that can update my diary and allow me to view appointments and drill in on the history of a client is really all that's needed.

For the mobile laptop however we have a choice. Either take a selection of the database, download it to a local laptop, update it and resynch it when next in the office. This should be a very simple process that any user with the correct permissions can perform. The alternative and becoming more and more popular and practicable is the using the mobile data card for ready access to CRM. This of course is apart from the more obvious example where a user simply logs in from a home office in the usual fashion.

Whatever way access is given the key point is that users who rarely if ever are in the office need to have access to the core systems or again the system simply is not going to work. If you have key workers on the road a CRM system brought in quite simply has to support them. There ought to be little compromise though in achieving this but consideration must be given as to what level of access is needed and how it ought to be delivered to them. Any worthwhile system should then be able to fall in line with that need.

## Integrate with the rest of the business

One key feature that distinguishes a great CRM project from simply a good one, is the degree to which the solution embraces the entire business. A description often (over?) used but often little understood is the "360 degree view" of the customer. What it tries to describe is each customer-facing department working in harmony with the same data set on the same customer so that there is consistency in how the customer is treated across the business. A CRM system itself can embrace the marketing, sales and customer service departments if desired and fully implemented. This is best practice CRM. Rarer though, although increasingly easy to realise from a technological point of view, is integrating the finance department, another often-ignored customer-facing department when it comes to improving service and efficiency.

Building this integration, or buying it out-of-the-box depending on the vendor, provides sales teams with numerous advantages. Credit and stock checks are automatic through the same system eliminating delays and speeding sales and improving service. Real time financial information is available if necessary with quotes and invoices being generated featuring current pricing and automatically updating the financial systems when approved. Equally forecasting and other financial models can be based on actual historical data.

## A pleasure to do business with you

We have covered at some length the internal efficiencies that a CRM system can deliver. We have pointed to the benefits of consistent data, improved reporting, accurate forecasting and the advantages of having remote access. But aren't we forgetting something – how does this benefit the humble customer?

The bottom line is that it makes your company a professional organisation with which to do business. Information is to hand when customers call. Offers are relevant rather than randomly generated and therefore a major irritant. Contact is regular and relevant from anyone in the organisation as the information is stored in systems not simply in people's heads. Quotes and invoices are accurate and timely. Ultimately any customer will develop a sense that your organisation knows and understands them to an appropriate extent.

There is considerable thought given to the concept of “customer loyalty”. Except for reasonably rare relationships this is probably too grand an ambition for most of our customer relationships. Either way, few customers are going to be loyal where there is a lapse in levels of service, or price, or product quality. A Sage CRM system can help a company provide better service, to stay knowledgeable about any price issues and provide a mechanism to complain or comment on product quality. It allows us to gather and retain knowledge on our customers and thus improve the relationships with them and help make them more “loyal” or “sticky” or however you like to describe regular customers. In essence, you are removing any reason for them to drift to your competition.

## Conclusion

This has been an attempt to offer an outline of the benefits generally realised by workers in a sales role through the introduction of a CRM system. There are literally hundreds of ways a company can benefit that will only be discovered through a thorough and specific business review. A CRM system will be able to automate many of these. We have not even looked at any depth into lead capture for example where not only can a CRM system help you with how you organise a sales team but also with how it can become a sales asset in itself as this might not be appropriate for every business.

Every sales organisation, and the job of every sales person, can be improved through a sensible introduction of a CRM system. Good sales people are hard to find and often expensive. It is beholden then on any organisation to make sure their time is spent on value-adding activities that are focused at the most profitable sectors of the market. This is true whether it's a local charity or a multinational defence contractor. Isolating and contacting the most profitable people to talk to, and providing excellence in service to those most valuable existing clients or customers are the two totems of a successful organisation. CRM can make this happen for every member of a sales team and promote organisational excellence.

## About Sage (UK) CRM Solutions

**Sage is a leading provider of Sales, marketing and Customer Service and Support solutions to small and mid-sized businesses. Sage offers a diverse Range of CRM products that can be tailored to suit individuals and organisations with simple or highly complex business requirements.**

**Sage's CRM products can be configured to automate almost any customer-facing business process. Sage has an extensive, experienced partner channel that can deliver these solutions appropriate to a specific industry or a particular business, from the smallest start-up to a major corporation.**

## Sage ACT! Professional for Workgroups

Sage ACT! Professional for Workgroups is part of the best-selling global ACT! brand, and provides powerful contact and customer management solutions for small/medium-sized businesses. Easy to set up and use it has all the features needed to get your sales and marketing in order – organising you, your contacts and your business.

## Sage CRM MME

Sage CRM MME is an easy to use, fast to deploy, feature rich low cost of ownership CRM solution designed to introduce the real benefits of CRM to mid-sized companies.

Sage CRM MME aggregates individual and group efforts across sales, marketing and support teams making people and companies more efficient at their roles. Sage CRM MME delivers the tools entirely through a browser to take advantage of the huge efficiencies that the Internet offers in delivering business applications.

## SageCRM.com

SageCRM.com is a comprehensive on-demand CRM solution for customers seeking a low-cost, low-risk option. One price gets you everything: CRM application, support, training, backups, and updates. SageCRM.com also offers the flexibility to migrate to an onsite CRM system as business needs evolve.

## Sage CRM SalesLogix

SalesLogix is the Customer Relationship Management solution that enables small to medium-sized businesses to cultivate profitable customer relationships by increasing sales and marketing performance and maximising customer satisfaction and loyalty.

Designed to meet the distinct needs of small to medium-sized businesses, SalesLogix delivers integrated Sales, Marketing, Customer Service and Support automation solutions that adapt to your unique customer acquisition, retention and development processes.

For more information, please contact your  
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The Sage logo consists of the word "sage" in a white, lowercase, sans-serif font, positioned on a green rectangular background.

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