Sage CRM Solutions

Customer Relationship Management

Sales Enablement:

User Acceptance Means More Sales

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A new approach to driving sales productivity is emerging, focused instead on optimizing the productive interaction between the salesperson and the customer.

Salespeople are the heart of any company. More significantly, productive salespeople are often the difference between company success and failure. Sales force automation (SFA) tools and technologies have historically been used to drive sales force productivity, usually from the perspective of sales management however, with an emphasis on sales pipeline management and forecasting. A new approach to driving sales productivity is emerging, focused instead on optimizing the productive interaction between the salesperson and the customer. This concept of *sales enablement* addresses what is often a thin line between business success and failure, the deciding factor often being something as minor as remembering to send an e-mail to a prospective customer, or it could be as significant as making sure a large proposal is in on time. Even that might depend on something as simple as a pop-up reminder before it gets lost in the crush of a demanding day.

True sales enablement is a goal to meet not just the needs of senior management, but also the individual salesperson. This paper will outline how sales enablement is a central component of a successful customer relationship management (CRM) strategy and distinguish sales enablement from traditional sales force automation.

An Industry of Transition

Sales force automation technologies were the precursor to the growing CRM industry. After roughly five years, the principles behind sales force automation began to evolve into something else. The new concept is knows as sales enablement. While the name change might not seem significant, the change in the underlying principles reflects a significant shift in the approach to and application of sales technologies within the sales community, ultimately resulting in the advent of CRM technologies prevalent in today's sales environments.

Small to mid-sized businesses historically begin their CRM initiatives (sales, marketing, and support automation) with the sales team implementation. It is estimated that nearly 90 percent of the small to mid-sized business CRM users are in sales and sales support departments. These businesses gauge the success of their CRM initiatives on the improvement to sales performance. Because of their early exposure to CRM technologies, salespeople within these small and mid-sized businesses often remain the most dominant user community, and sales performance is the key metric of the overall CRM initiative's success. As such, sales staff acceptance and usage is critical to the success of the CRM initiative.

Historically, sales force automation tools were aimed at improving the efficiencies of sales management. That meant features like solid forecasting and tools that made the pipeline easy to view and analyze were paramount and were emphasized in the selection process. Other features considered less important were included such as a few usable screens for salespeople and automation of various repetitive processes. Modest attempts were made to reduce the time a salesperson spent on administrative tasks and to improve their efficiency and productivity, but more importantly, from the perspective of senior management, the top leaders now had a transparent window into sales that seemed to be just what was needed.

While there were notable successes in some larger enterprises, salespeople universally resisted the push to use early sales force automation tools. They didn't see using them as much more than allowing their senior management visibility into their actions and activities. In essence, what was great for the executive staff hardly seemed to be a productivity benefit for the salespeople. While this perception was not entirely true, it held some merit. The tools that sales force automation technology provided, while only somewhat valuable to the sales teams, were not salesperson friendly. Therefore acceptance by sales personnel was far less universal than desired.

User acceptance issues were also historically different from market segment to market segment. For example, the small- to mid-sized business (SMB) segment needed to be addressed as a separate market from the enterprise

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segment. Simply transposing sales force automation tools from the larger enterprise to the SMB didn't work. The business requirements, features, and applications to make the sales teams productive in a $7 billion company were considerably different than those for the $10 million or $250 million company.

Regardless of market scope, over time one indisputable fact became evident: for CRM to succeed, salespeople must use it with enthusiasm. Their adoption hinges on a system that delivers a sales productivity benefit combined with a friendly user experience. What exactly does that mean?

Usability vs. Functionality: First Things First

There has been lengthy discussion about CRM usability versus functionality. Functionality is defined as the raw feature set of any given application. Yet, a function or feature, in and of itself, has no inherent value for a user. Inclusion of hundreds of features without regard to their overall or individual value does not produce a more powerful or productive CRM experience.

Reality Is Different

What makes a CRM application viable is the usability of and ultimately the business impact derived through highly relevant features. This is far more important than the total possible capabilities of the application. Useless or little used functions increase the price and complexity of the application and often serve to reduce the viability of the CRM project. Yet, the quantity and sophistication of functions is often positioned as the signature value for CRM applications. If the value of any given function is relative to benefit realized by the individual user, how do you determine which are useful and which are useless?

User Self-Interest Drives Sustainable Sales Performance

There are two important concepts to understand when addressing the difference between functionality and usability in the world of CRM applications. First, recognize that the cardinal principle of salesperson acceptance is embedded in individual self-interest. That does not mean corporate self-interest, departmental self-interest, or sales team interest. It means that which makes that single person a supportive participant. If the individual receives value from the CRM system then they will use it. If they don't, they won't. Quid pro quo. Given this, providing value to all would appear to be a difficult task because it would theoretically require pleasing every individual in a sales environment.

Before looking at those characteristics that will make the sales staff enthusiastic, it is important to emphasize that there is no way everyone is going to be immediately satisfied with a CRM application. That is reality. That means a good CRM application will provide a benefit to the sales division commonwealth and support the "greater good." Ultimately, it means user acceptance by the largest part of that team. That is the second key concept. There will always be difficult cases that have been using spreadsheets and word processing documents for many years with mixed results. These late adopters, however, will come along as they watch the positive impact properly designed technology has on their peers. The fundamental purpose of a CRM initiative is to drive sales performance and foster profitable customer relationships. If the application's features successfully catalyze the relationship between the account owner and the account, then the CRM system has value to the company.

Understanding Customer Relationships: A Change Will Do You Good

Good salespeople understand that there is much more to success than a qualified lead or closing that all-important contract. There has been an increasingly sharp understanding that a customer relationship begins by nurturing a target account into an inquiry, then an opportunity, and then a customer. And, most organizations find relationships considerably more profitable after the initial sale.

This is leading to a change in sales force automation tools, moving now toward sales enablement. Traditional sales force automation technologies has been aimed at the vice president of sales, sales directors, or those interested in pipeline management. Of course, there has been substantial functionality aimed at the salesperson, but it has been frequently rejected as too difficult to use, or considered not useful at all. Companies using the sales force automation aspects of CRM tools now are demanding revamps to their applications to make them substantially more useful to the salesperson. This movement demonstrates the phenomenon that the traditional focus on the requirements sales management is shifting to sales enablement and a focus on holistic customer relationships.

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User Acceptance and Usability

What are the changes that are being made to sales force automation tools to make them useable for salespeople? There are functions and then there are usable features. Usable features are those functions that are likely to be regularly used by a majority of the users and are in their best self-interest to use. Below are some of the features that make sales automation tools "accepted."

Clean, Easy-to-Use Interface

This is perhaps the most underestimated feature. A poorly-designed interface can destroy an individual's interest in the application, no matter how usable. Use of items like big buttons with clear labels, a simple-to-access tab interface, easy drag-and-drop capabilities, or even features as simple as a "go back" key or a "recent records" button make the use of the application more of a pleasure than a chore. If it is not only easy to use, but also visually appealing and uncluttered, the odds for successful acceptance can go up dramatically.

Effective Account Management Tools

There is a distinction between an innovative technological function and a useful, practical account management feature. For example, it is innovative to have customer auto-call as a Web feature, but it is not necessarily a feature all that frequently used. Yet, it is useful and actually can make a salesperson more effective to have easy lookups on all the fields of an application. Ultimately, a salesperson requires the freedom to navigate the system and have the flexibility to move back and forth from account to contact to opportunity to notes without being handcuffed by the database structure behind the technology.

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Easy Integration with Familiar Desktop Applications Like Outlook and Lotus Notes

This is a mission critical feature. There are over 150 million people who use Outlook and Lotus Notes combined. There is no company that uses these mission critical e-mail applications that would be willing to stop using them for the benefit of their CRM solution. This means seamless, easy integration between these applications and the CRM application used by customer-facing employees is extremely important to sales team members.

Seamless Integration with the Back-Office

For salespeople to manage an account well it is often necessary to have both accurate knowledge of and timely access to information stored in the "back-office," such as accounts receivable, catalog look-ups and product inventory status. Access to back-office information needs to be transparent to the salesperson, not requiring them to leave the familiar environment of their CRM application. Seamless integration is a critical factor in improving salesperson effectiveness. The less time a salesperson has to "stand in line" for accounting information and the more direct access the rep has to back-office information, the more time he or she has to sell. And generally, there are less interruptions to the business overall, and the appearance to the customer of being more informed.

The CRM application must be designed to provide seamless integration with the organization's back-office, legacy and Web systems. The application should provide an open environment that supports the integration technologies that are most appropriate for the nature and size of the business. To provide even greater benefit, the sales application should come with pre-built integrations to popular back-office systems to reduce the time and complexity of integrating with those systems.

Adaptable and Flexible Business Process Capabilities That Fit

Small to mid-sized businesses are unique and so are their business processes. Even companies in the same industry have unique processes they have developed which differentiate them from their competition. A variety of best practices and sustainable business processes should be able to be embedded in a CRM application. An extremely important part of making salespeople comfortable is a CRM system that can accommodate these unique business processes. What makes the system effective is the flexibility to mold to the organization's unique sales and business processes as well as its ability to adapt to the individual users' requirements. Equally important is the system's capability to change as the organization grows and develops new processes.

Tools That Enhance Interactions with Customers

These are essential sales productivity tools. For example, having access to your prospects and customers via multiple communications channels (Web, phone, e-mail, etc.) makes a significant difference in users' comfort levels. How often are customers frustrated because they are unable to reach their supplier or customer service representative quickly? For a salesperson, having multiple interaction channels with their customers or prospects can prevent them from having a negative experience or losing a deal. A CRM system that enables enhanced communication and also automatically tracks these important interactions with customers and prospects is very valuable to an organization's sales people, especially those that deal with hundreds or thousands of prospects a year.

High Level of Personalization So That Individual Salespeople Have a System That Is "Theirs"

Each person has a personality that is unique. This means that each person is comfortable doing things in a manner that may not necessarily make another person comfortable. On the other hand, in a corporation, there needs to be universal business procedures (best practices) that govern the general method of doing corporate business. Custom configuration, or personalization, is the answer. For CRM, it means that the individual salesperson can incorporate their style and approach into the system (within limits) without affecting anyone else's use of the system. A user should be able to create their own customer and prospect groups, tab layout, templates, sales letters, and even screen colors that fit their own productivity style; not be forced into a rigid application that enforces its own concept of efficiency. (Note: this is personalization, not customization, which is traditionally by the IT department, not the user.)

Embedding Sales Methodologies into the Applications Is a Qualified Benefit

There are a substantial number of successful sales methodologies that are part of many sales toolkits. Corporations spend thousands of dollars to train their sales personnel in Solution Selling or Miller Heiman or other prominent methodologies. Many companies even develop and standardize on their own unique selling methodologies developed over years of selling in a particular industry. A good CRM application will embed the best and most widely accepted sales methodologies or allow new, custom ones to be easily created. The application should give the sales person the means to either employ or ignore these methodologies. For the new salesperson, this is an important feature which allows them to conform to a proven methodology at an early stage in their sales career. For a veteran, this is a way of using tricks of the trade to enhance their sales abilities and experience. In any case, access should be optional and constrained at the administrative level, so built-in flexibility is key.

A Highly Mobile Sales Force — Access and Mobility

An effective CRM application will provide today's highly mobile workforce access in both connected and disconnected environments via PDAs, Smart Phones, Tablet PCs, and laptops. Mobile salespeople are frequently disconnected from the LAN and the Web. During these times they need complete access to customer information to be productive. And, when they reconnect, they can't afford to lose valuable selling time to delays or intermittent synchronization.

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Data synchronization is a critical technology that enables users to access and share up-to-date customer and sales information in the field, even when disconnected. Approaches to synchronization vary widely - as do the amount of success they achieve. Evaluating a CRM solution's synchronization system can help avoid problems that have doomed many CRM projects to failure.

The judgment as to which synchronization system best meets a particular company's needs is, of course, a business decision. It must support the overall goals of an organization, including providing salespeople with more time to sell due to real-time access to customer information – fostering a more efficient sales process, and yielding up-to-the-minute and accurate forecasts. The synchronization system that best meets these needs best serves its users and owners.

The process of synchronization should be simple and fast. Users should have the choice to synchronize with the click of a button, or to automatically detect an Internet or network connection and synchronize in the background without any user intervention.

The sales enablement value chain is as follows: salespeople accept the system, sales force productivity increases, sales force productivity drives sustainable sales performance.

Conclusion

Automating the sales organization is most frequently the first objective of any CRM initiative in the small and mid-sized business segment. Nearly 90 percent of all successful CRM implementations have sales automation tools installed, and over 90 percent of the CRM users in the small to mid-sized segment are sales users. Sales force enablement is a critical outcome to an effective CRM effort. The sales enablement value chain is as follows: salespeople accept the system, sales force productivity increases, sales force productivity drives sustainable sales performance.

Deliver a tool that provides your salespeople value and usability. In return, you will have a system that people actually use, which will ultimately benefit the entire organization. If a CRM solution is on the radar screen for your small to mid-sized company, then emphasize sales enablement. It is never too early to improve your revenue.