



Sales Enablement User Acceptance = More Sales

Sales people are the heart of any company. More significantly, productive sales people are often the difference between company success and failure.

Sales force automation has been used to drive productivity, usually from the perspective of sales management, with an emphasis on sales pipeline management and forecasting.



A new approach to driving sales productivity is emerging, which focuses on optimising the interactions between sales people and the customers. This sales enablement addresses what's often a thin line between success and failure. The difference can be as little as remembering to send an e-mail to a prospective customer, or it could be as significant as making sure that a proposal is in on time. Even that might entail something as simple as a pop-up reminder before it gets lost in the crush of a demanding day.

Sale enablement is targeted to meet not just the needs of senior management, but also the sales person. This guide outlines how sales enablement is a central component of a successful customer relationship management strategy and distinguishes sales enablement from traditional sales force automation.

An Industry of Transition

Sales force automation was the precursor to the CRM industry. After roughly five years, sales force automation, often called the foundation for current CRM growth, has evolved into something else. That something else is called sales enablement. While the name change might not seem significant, it reflects a significant change in the concept of how CRM works in the sales community.

Small to mid-sized businesses have historically led, and still continue to lead, their CRM initiatives (marketing, sales and support automation) with the sales team implementation. It is estimated that more than 90 percent of the small to mid-sized business CRM users are in sales and support departments.

These businesses gauge the success of their CRM initiatives on the improvement to sales performance. In small and mid-sized business CRM initiatives, sales automation is installed first, sales personnel are the most dominant user community, and sales performance is the key metric of the CRM initiative's success.

Sales staff acceptance and usage is critical to the success of the CRM initiative. Historically, sales force automation was aimed at improving efficiencies of sales management. That meant features like solid forecasting and tools that made the pipeline

Sales Enablement



easy to see and administer were paramount. Other less important features were included such as a few usable screens for sales people and automation of as many processes as possible.

Attempts were made to reduce the time a sales person spent on administrative tasks and improve their efficiency and productivity. From the perspective of senior management, the top enterprise leaders had a transparent window into sales that seemed to be just what was needed.

While there were notable successes in some of the larger enterprises, sales people often resisted the change. They viewed sales force automation merely as a means for senior management visibility to keep an eye on them. What was great for their executive staff was not seen as a productivity benefit for sales people.

While this perception was not entirely true, it had some merit. The tools that sales force automation provided, while useful to the sales teams, were not sales people friendly. As a result acceptance by sales personnel was less widespread than desired.

User acceptance issues were also different from market segment to market segment. For example, the small to mid-sized enterprise (SME) segment needed to be addressed as a separate market from the enterprise segment. Just transposing sales force automation from the larger enterprise to the SME didn't work. The features and applications to make the sales teams productive in a multi million pound company were considerably different than for the £5 million or £12 million company.

Regardless of the market scope, there was one indisputable fact: For CRM to succeed, sales people must use it with enthusiasm. And their adoption hinges on a system that delivers a sales productivity benefit and a user-friendly interface. So what exactly does that mean?

Usability Vs. Functionality: First Things First

There has been an on-going discussion about CRM usability versus functionality. Functionality is defined as the feature set of any given application but this in itself has no real value for a user. A CRM system with hundreds of functions without regard to their overall or individual value doesn't produce a more powerful or productive experience for people.

Reality Is Different

What makes a CRM application viable is the usability of important features. This is far more important than how many there are. Useless or little used functions increase the price and complexity of the application and reduce the viability of the CRM project. Yet, the number of functions is often presented as the signature value for sales force automation applications. If the value of any given function is relative to the user, how do you determine which are useful and which are useless?

Sales Enablement



User Self-Interest Drives Sustainable Sales Performance

There are two ways to differentiate functionality versus usability in the world of sales enablement.

First, recognise that the key principle of sales person acceptance is driven by self-interest. That does not mean corporate self-interest, departmental self-interest or sales force interest. It means what makes an individual a supportive participant. If they perceive and derive value from the CRM system then they will use it. If they don't, they won't. This may seem to be a difficult task because how do you please every individual in a sales environment?

Before we get into those characteristics that will make the sales staff enthusiastic, let's be clear on one thing. There is no way that everyone is going to be immediately satisfied over a sales automation system. That is the reality. That means that a good sales automation system will provide a benefit to the sales division commonwealth and support the "greater good."

Ultimately, that means user acceptance by the largest part of that team. Of course, there will always be difficult cases that have been using spread-sheets and word processing documents. These late adopters, however, will come along as they watch the positive impact 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 catalyse the relationship between the owner and the account, then the CRM system has value to the company.

Understanding Customer Relationships: A Change Will Do You Good

Good sales people 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 enquiry, then an opportunity. And, most organisations find relationships considerably more profitable after the initial sale.

This is leading to a change in sales force automation leading towards sales enablement. Traditional sales force automation has been aimed at the sales directors or those interested in pipeline management.

Of course, there has been substantial functionality that is aimed at the sales person, but it has been frequently rejected as too difficult to use, or considered not useful at all. CRM customers are demanding revamps to their applications to make them substantially more useful to the field sales person. The sales force automation focus on sales management is shifting to the sales enablement focus on the customer relationship.

Sales Enablement



User Acceptance and Usability

What are these changes that have to be made to sales force automation to make it useable for sales people? There are functions and then there are usable features. Useable features are those functions that are likely to be regularly used by the majority of the users and are in their self-interest to use. Overleaf are some of the features that make sales automation “acceptable.”

Clean, Easy-to-Use Interface

This is, perhaps, the most underestimated feature. A bad interface can destroy an individual’s interest in the application, no matter how useable. Use of items like big buttons with clear labels or a simple-to-access tab interface, lots of easy drag-and-drop capabilities, or even something as simple as a “go back” key or a “recent records” button makes the use of the applications more tolerable. If it is not only easy to use, but also visually appealing and uncluttered then the odds for successful acceptance can go up dramatically.

Effective Account Management Tools

There is a distinction between an innovative technological function and an actually useful account management feature. For example, it is innovative to have customer auto call for one of the web features, but not necessarily a feature that people will frequently use.

Yet, it is useful and actually can make a sales person more effective to have easy lookups on all fields of an application. Ultimately, a sales person requires the freedom to navigate the system and have the flexibility to move from account to contact to notes without having to worry about the database structure behind the technology.

Easy Integration with Familiar Desktop Applications like Microsoft Outlook

This is a mission critical feature. There are millions of people who are using Outlook. There is no company that uses this and other mission critical email applications that would be willing to stop using them for the benefit of the CRM package. That means seamless, easy integration between these applications and the customer-facing CRM applications - it is something that is extremely important to the sales team members.

Seamless Integration with Back Office

For sales people to manage an account well it is often necessary to have both accurate knowledge of, and timely access to, back office activities such as accounts receivable, catalogue look-ups and product inventory status.

This access to back office information needs to be transparent to the sales person. It should not need them to leave the familiar environment of the sales automation application. The less time a sales person has to “stand in line” for accounting answers and the more direct access the rep has to back-office information, the more time he has to sell. And generally, there are less interruptions to the business overall.

Sales Enablement



The sales application must be designed to provide seamless integration with the organisation'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 business. To provide even greater benefit, the sales application should come with pre-built integrations to major 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 practises and sustainable business processes are going to be embedded in any CRM application. This is part of the functionality.

A key part of making the sales person comfortable is a CRM system that is adaptable to those unique business processes. What makes the systems usable is the degree of flexibility to mould to the organisation'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 organisation grows and acquires new processes.

Tools That Enhance Interactions with the Customer

These are essential sales productivity tools. For example, having access to your prospects and customers with multiple communications channels (web, phone, email, etc.) makes a huge difference in users' comfort levels.

Think about it. How often have you been frustrated because you were unable to reach your supplier or your customer service representative? For a sales person, these enhanced interactions with the customer can prevent the prospect from having a major negative reaction or losing the deal.

A CRM system that automatically tracks these important interactions with customer and prospects is very valuable to an organisation's sales people, especially those that deal with hundreds or thousands of prospects a year.

High Level of Personalisation so individual sales people can have a system that is "theirs"

Everyone has their own unique personality. What is comfortable to someone does not necessarily make another person feel the same. On the other hand, in a corporation, it is clear that there needs to be consistent business procedures and best practice that control the general method of doing business.

Custom configuration or personalisation is the answer. This means that the individual sales person 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 lists, tab structures, menu displays and sales letters that fit their own productivity style; not a rigid application that enforces its own concept of efficiency.

Sales Enablement



Embedding Sales Methodologies into the Applications is a Qualified Benefit

There are a substantial number of successful sales methodologies that have been part of many sales toolkits. Businesses spend thousands of pounds to train their sales personnel. The application should give the sales person the means to access or ignore these methodologies. For the new sales person, this is an important feature allowing them to conform to a methodology at an early stage of their sales career.

For a veteran, this is a way of getting the tricks of the trade to enhance their sales abilities and experience. In any case, access can be optional and constrained at the administrative level, so there is a lot of built-in flexibility.

A Highly Mobile Sales Force - Access and Mobility

An effective CRM application will provide today's highly mobile workforce access in both a connected or disconnected environment with PDA's and laptops. Mobile sales people 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 be delayed or experience intermittent synchronisation.

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

The judgement as to which synchronisation system best meets a particular company's needs is, of course, a business decision. It must support the overall goals of an organisation, including providing sales people 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 synchronisation system that best meets these needs best serves its users and owners.

Conclusion

Automating the sales organisation is most frequently the first objective of any CRM initiative in the small and mid sized enterprise segment.

Nearly 90 per cent of all successful CRM implementations have sales automation tools installed and over 90 per cent 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: sales people accept the system, sales force productivity increases, sales force productivity drives sustainable sales performance.

Deliver a tool that provides your sales people value and usability. In return, you will have a system that people actually use, which will ultimately benefit the entire organisation. If a new CRM solution is on the radar for your business, then emphasise sales enablement. It is never too early to improve your revenue.





ABOUT PREACT CRM

Preact is an independent Customer Relationship Management (CRM) consultancy working with businesses in the private sector as well as charities and educational organisations.

As multiple award winning CRM architects, we've been helping businesses achieve success from their CRM strategy since 1993. Our experienced team combine strong consultative skills with professional implementation skills and a commitment to customer service excellence.

By working with Sage ACT! and Microsoft Dynamics CRM we offer vendor-neutral advice to help organisations select the most effective solution for their unique requirements.

OUR APPROACH

We take a product agnostic approach to pre-sales to help you choose a CRM solution that will meet your immediate requirements and support business growth. Our consultants will discuss your plans in detail and help you test our recommendations.

Our efforts are focused on developing long term business relationships and we're committed to an on-going evaluation of our performance. We actively seek client feedback to ensure we're delivering on our brand promise of exceeding customer expectations. We were proud to receive the 2011 Sage Circle of Excellence award in recognition of the quality of our service based on independently collected feedback.

All of our implementation team hold the highest accreditations, including Microsoft CRM Implementation, Customisation and Developer Certifications, Microsoft Surestep Project Management, Prince2 accreditations & Scribe Certification ensuring that every requirement is expertly managed at each stage.

We offer a full range of pre-sales, technical consultancy, training and support services to cover every step of your CRM project.

Our recent projects have included implementations for John Lewis Plc, Toshiba Air Conditioning, East Berkshire College, Scottish & Southern Energy, Cranfield University & Europe's largest ACT! implementation for Oxford Instruments Plc.

