



Sell More Manage Less

New Sales Management Reporting Alternatives: Pros and Cons

How to Increase Sales Rep Productivity with Technology

Toll Free	800-611-4343
Toronto	416-253-5555
New York	718-360-1818
Miami	954-727-8571
Dallas	214-774-4775
Scottsdale	480-282-8404

Higher business to business sales costs are driving the need to reassess sales relationship management technology. The majority of these fail with far reaching effects. These programs need to minimize overall costs, compliance liabilities and administrative burden while maximizing new and repeat sales. Apply the secrets learned from Warren Buffet and his companies and draw from over 20 years of hands on experience in guiding sales technology with teams of 5 reps to hundreds including many of the Fortune 500.

There are several approaches to building sales rep productivity tools and Sales Management Reporting Systems: How do you assess which one is right for you? This report explores the pros and cons of the 4 approaches:

1. Management Reporting Driven
2. Sales Rep Driven
3. Information Technology Driven
4. Design Audit Driven

1. Management Reporting Driven

Back in the early 1990's, management at one of the country's largest publishers figured out the

Pros	Cons
Enforceable	Reports and forecasts to please – often inaccurate
“Do it or your fired”	Reduces selling time – often incomplete
	Not real time – always dated

reports they wanted to run their business, then invested heavily and purchased the latest IBM technology, hired us to implement it, flew us to Bermuda in January to train their sales people and decided each rep must fill out 400 data fields, on each sales call to drive the reports they wanted. You guessed the result from the sales rep's perspective. Failure.

The standard management reporting driven approach is, as the name implies, based on managements need for reports to make wise decisions. Reports are only as valuable as the accuracy of the data. The accuracy of the data is primarily the responsibility of sales reps that are notoriously driven by sales, not data entry or paperwork.

“I am making sales calls, not entering data or doing call reports”

Reps do not enter all the data and key secrets that marketing or management needs or worse, being politically astute, report only what management wants to hear meaning that valuable information is never recorded, never entered, and lost forever. Within this environment, management is often held hostage becoming reliant on a few superstar sales reps that are unmanageable and irreplaceable. The Management reporting driven approach is satisfactory for low level transactional fast food style

consumer sales, but in today’s highly competitive market it is poorly suited for business to business sales that require developing strong relationships supported by strategy, data, and expertise.

Another limitation is that reports give visibility typically once a week or once a month. This results in sales management receiving continuously outdated information, often when it is too late to spot problems and intervene to help the sales rep win the deal. This interferes with execution of account strategy, both management and reps execute according to plan and need to track progress towards agreed goals. Think of the cost of all the big ones that got away, and the multitude of excuses reps have for losing deals, what would it have meant if you had accurately known, so you could turn the tide and win the battle.

2. Sales Rep Driven

The Sales Rep Driven approach gives reps total freedom to use as much or as little technology as they wish. “I do not care what you use, do or say, just sell like heck and make your numbers”

Pros	Cons
Simple and Easy	No or poor reporting and forecasting
“just sell”	Time theft, visibility only when it is too late
	Customer loss and real risk of relationship data loss

The sales reps usually turn to what they’ve used in the past, be it Microsoft Word, Excel, Outlook or ACT, this may work for the rep but does nothing for the larger goal of retaining business intelligence and sharing knowledge across the company. The end result is no standardization in record keeping, no sales visibility, duplication of

effort in regards to sales technology, and leads to sales reps fighting with sales technology rather than making sales.

Another recent manufacturing and distribution client had an investor mandate to grow by over 12% per year. To do this the CEO needed full visibility to sales rep relationship and opportunity data. When a rep left or even if they stayed the old grass roots ACT contact manager and Outlook emails were not captured and easily reported. The CEO had to ask the VP of Sales for sales activity and sales forecasts, who asked the regional managers, who asked the reps, who sometimes would ask customers or guess which of the many products customers may or may not buy in the future. Now due to our unique training and full sales rep adoption, opportunity prioritization plans are developed with customers and the forecasts are real time, accurate, and visible all the way to the top, supporting the right management decisions.

Today the average cost of a Business to Business Phone Sales Call Conversation is over \$9.00, think of all the wasted time with voicemails, calling inaccurate lists, etc. The average cost of a business to business in person sales call is \$329 according to Cahner Research. And if you do not win every deal with the first call, your cost for every new client is significantly higher. By leveraging Sales and CRM technology you can reduce your people costs, marketing expense, and qualify leads more effectively.

The time wasted by sales reps using a kaleidoscope of sales technologies that detract from sales is costly but selecting the wrong technology can be even more devastating with poor results, missed opportunities, and the costs of retraining and switching to technology that will actually work. Time is the most valuable sales resource, irreplaceable as illustrated later in the, “Before and After QualityIntegrity Design Audit Process” graph. Planning, prioritizing, tracking and measuring your time on activities and prospects consistently produces top sales performers. Applying industry and company best practices and sales processes, enables the replication of the best sales reps performance throughout your team.

The greatest risk with the Sales Rep Driven approach is in the departure of the rep, how does the company continue to develop the reps relationships without notes, emails, shoeboxes of business cards, and verbal conversations had. Capturing it all and having it centrally backed up and protected is key. This Sales Rep Driven wild-west style of selling significantly reduces the intellectual property value of a company and its long term consistent performance.

3. Information Technology Driven

IT departments can have weaknesses to either be drawn to the latest technology like moths to fire or move at a snails pace hesitant to implement new technologies without a lengthy track record. Information Technology driven approaches typically has more to do with budgets and IT technology favoritism, than with what your sales reps truly need.

Pros	Cons
Cool technology	Being limited by your data
	Too far removed from your customers real needs
	Safe too slow to change, internally or by users

Another one of the country’s Top Ten Financial institutions with over 1,000 locations came to us, they liked our concept and purchased but then decided to use their very large technical resources and near limitless budget to implement internally, the result, little success. Several months later they called and said,

"You know that Design Audit Process we skipped over – well, we would now like to do it - Now".

We got them on the right track. We built new innovative sales processes and activity triggers to help them expand, and now they have it on laptops and new mobile PDA’s and BlackBerries.

Your IT department has many roles, but arguably it is the most removed from the frontline sales in your company and what your end customers really need. So IT sales technology decisions are often based on a check list of what will be the coolest, latest and greatest technology or what will require the least time to implement and support and be the safest, neither addresses the real needs of your end customers and therefore it will cost you sales.

Management, marketing and sales reps often are limited by disparate data or waiting for IT resources to get the reports, data and ideas they needed yesterday, implemented. The cost of waiting for IT is

lost opportunities, lost sales and missed accountability which compounds to create communication problems and loss of faith. How often does IT need to professionally shop for sales technology – and can they be expected to know as much experts who have spent over 20 years assessing, diagnosing, prescribing and implementing balanced sales technology to drive the results that your customers, sales and management needs.

4. Design Audit Driven

Pros	Cons
3 rd party balance and buy in of all stakeholders	
Largest time savings with consistent 17% plus increase in profits	
Strategic reporting to smallest detail with highest quality data with integrity	

The three above approaches are the most common reasons why today over 60% of sales management technology and CRM projects fail.

Our QualityIntegrity Design Audits have been proven and improved by thousands of customers from small sales teams to Berkshire Hathaway and Warren Buffet.

Following the QualityIntegrity Design Audit Driven Approach: Warren Buffets Sales team renewed their focus using the new customized CRM system to see what customers had bought and what they needed next, and then penetrated prospects deeper by leveraging contacts to up sell and cross sell every opportunity for increased profit. His marketing had all the data to maximize response and track results. His management deployed a consistent sales methodology and increased close rates, reporting record results and increasing profit by 17% per year for over 3 years straight, in a challenging market. This is what we have done for Warren Buffet’s companies and here are the key ingredients you should include in your Design Audit Driven Approach.

FIRST – Pay for Performance

Return on Investment on every project should always calculated before you invest in sales and management technology. By using an external partner, you can hold QualityIntegrity accountable for your successful solution both in cost control and delivery timelines. If you attempt this internally you often have no control over extended timelines and in fact research shows that you will end up increasing hidden costs of your IT staffing requirements and overhead costs that will never go away, add to this ongoing costs of additional CRM expertise training and beginners mistakes of doing it internally.

SECOND – Improve Sales Processes

By leveraging sales and CRM technologies, you can reduce your people costs, marketing and reporting expenses. Implementing a consistent sales methodology that is well thought out ensures you consistently qualify and close more business faster. In Warren Buffets case we consistently measured the time the sales process took while improving the quality of data and integrity of relationships.

THIRD – Leverage IT Strategically

Just because you can does not mean you should when it comes to technology, knowing just how much or how little technology to apply to a sales force and sales process only comes with many years of direct experience. Integrate data from that back end IT systems that shortens sales cycles and improves client communication or significantly improves sales management visibility. Sales Force Automation (SFA) and Customer Relationship Management (CRM) Salesmen, and on demand hosted Salesmen are paid to lie, fight brand wars, feature wars, price wars and rarely have the experience to achieve managements goals with full user adoption and buy in. Our product neutrality allows us to focus on your unique gains and business wins in designing and implementing a solution for you.

FOURTH – Obtain User Buy-in Early

Listening carefully to sales reps pains, sales management vision and goals, and IT requirements allows you to accurately assess the current situation. Similar to how a doctor would diagnose a patient, experienced QualityIntegrity sales technology experts are uniquely suited to naturally probe for what are the likes and dislikes with the current sales and marketing technology, where is it frustrating, where is time wasted, how are customers and prospects lost, asking the hard questions, where do you feel the pain and then prescribe the correct sales technology. Having an 3rd party expert outside reconcile the disparate sensitive needs of key stakeholders in Sales, Management and IT is essential.

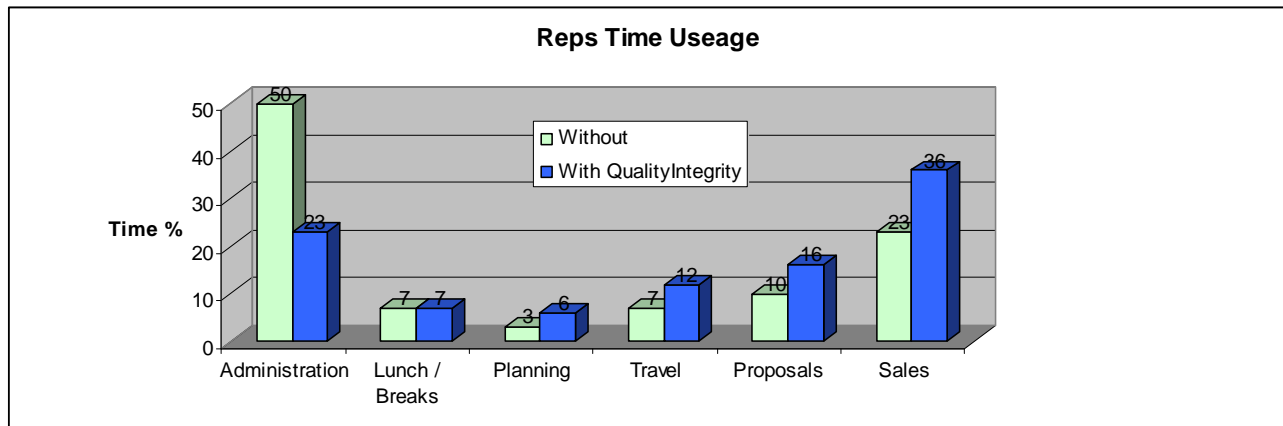
FIFTH – Train One on One

Cost effective functional group training often is the quickest way to implement sales and management technology changes. However we have consistently seen our outstanding 97% user adoption rates when an organization is committed to our ongoing proactive maintenance and highly effective one on one training. This helps every individual in your organization fully utilize technology to reach their potential and ensure compliance. The good will and intellectual property value of organizations increases far in excess of the costs.

SIXTH - Sell More

With strategic sales management systems that reps love to use, building stronger relationships with your customers and prospects will happen faster. Integrate your key business systems with Pocket PC, BlackBerry and mobile devices and empower your sales team to win. Consider investing into your sales reps efficiency automating and perfecting processes, when done right they will consistently exceed your expectations and sell more. Most sales rep who start Monday morning use up all their selling time by Tuesday afternoon. Our time studies have proven often before the Design Audit up to 50% of Sales reps time is spent on non selling activities like handling customer service issues, looking for information, manual processes and follow-up. After experiencing the Design Audit Driven Approach and recommendations see the significantly more selling time.

TIME BEFORE & AFTER THE QUALITYINTEGRITY PROCESS



SEVENTH – Manage Less

If you doubled your sales reps productivity what would it mean to you? The fastest way to-do this is measure and coach with interactive Sales Management Reporting Dashboards. Now because of increased competitive pressures, instant business intelligence is required for both management and sales reps productivity. Imagine if your Sales Management Reports were accurate, on time, integrated, intuitive, interactive and gave you real insight on leads, activities, wins, losses and those things that are important to you. Now they can be.

“If I had only known!” Begin to imagine how technology should support you, save you time, and give you the power to deliver to customers and prospects clear concise consistent communication. For example new Sales Management Report Dashboards allow you to not only see a forecast but simply click on the data to drill down to see the specific customer and opportunity, and proactively coach, assist or step in to the most important deals to win more market share, before it is too late and the business is lost.

Remember the leader’s job is always the riskiest, so let our experience and Design Audit process reduce the risk.

In this economy, "The World is Flat" competitive pressures will force you to improve sales management. To lead you need to know where you are, what sales activities and opportunities your team is working on, know competitors sales reports and positions, and focus your sales on the best most profitable ventures and customers. New sales management tools and dashboards give you the visibility required to make better management decisions with accurate data. Know more and manage less.

Summary

Find out “what’s outside the box” One of the most valuable reasons to use QualityIntegrity, is that we bring 20+ years of experience, from completely diverse industries and situations, and have vertical knowledge to create innovative solutions that meet your needs. This cross-pollination of unique ideas we bring is something that quite simply you cannot do on your own. Wise sales management insures long term success. A great first impression, a great sales team is the face of your business and the source of much of your revenue, invest wisely in them, and you will receive many times your investment in return. It is very important to fully utilize sales and marketing technology with management reporting visibility to motivate sales reps to sell more consistently. However employers should not overpay or put sales reps in a situation where technology is an excuse or steals time from building customer relationships that last. If people and relationships are the most important thing in your business, imagine what improved processes and leveraging Sales Relationship Management Technology will do for you. By fully utilizing sales technology and CRM you will significantly reduce risk and increase profit. In these times of higher sales costs and shortages of experienced top performing reps, organizations should review their sales technology and sales management reporting systems to ensure balance is maintained.

QualityIntegrity provides a free, no obligation assessment of sales technology and sales management reporting systems. Please contact us toll free at 1-800-611-4343 or visit our website at www.QualityIntegrity.com if you require further assistance to assess your existing sales technology CRM or sales management reporting systems.