



The Velos Newsletter -- September 2006 Vol. 2 - No. 6

[Newsletter forwarded to you? Click here To Join mailing list.](#)

Increasing SFA/CRM Software Adoption Among Your Sales Force

Prospective clients often ask us “. . .Even though we have the Sales Force Automation (SFA) or Customer Relationship Management (CRM) software in place, the sales force isn't using it. What can I do?”

To support this even further, in the Sales Lead Management survey we conduct, one of the main concerns we hear from business owners is that their SFA/CRM software is ineffective; they are not receiving the advantages and ROI from their original investment.



(NOTE: Please take a minute to fill out our survey if you haven't already done so — just click on this link: <http://www.zoomerang.com/survey.cgi?p=WEB225N26WKD3Q>. All results are anonymous and will help us support your needs in this critical business area even better. Thank you for your time.)

Below are three tips we strongly recommend to encourage a sales force to want to use the software and provides business owners all the benefits of the software they envisioned when they purchased it in the first place.

1. Understand that successful SFA/CRM implementations involve more bottoms-up than top-down planning.

The software must be geared towards making the sales rep more successful and also easy to use. Many less than optimal implementations were driven by a top-down approach where the owner or other management outlined what they wanted the software to accomplish without input from the user community, in this case, sales reps. The resulting software was geared towards heavy data collection and lots of reports.

Planned well, the resulting SFA/CRM software will be customized to take advantage of the company's unique sales approach, marketplace and data collection needs. The software will be relatively intuitive to use and the sales reps will be comfortable evaluating it, as well as using it.

By no means does this suggest that management requirements are not taken into account. We're recommending that these requirements should be well analyzed and prioritized. Then, additional thought should be given to which organization(s) should be required to provide the information. In many cases, marketing can provide much of the information through skillful mining of the company's Enterprise Resource Planning (ERP) or Accounting software, as well as, general third-party databases, such as Dun & Bradstreet, InfoUSA, or other specialized databases, such as the Harte-Hanks Technology Database. An added benefit is that as the company's sales inquiries are qualified, marketing can capture valuable account profile information in the database.

2. WIIFM.

Good sales people have an old term they use; WIIFM, “What's In It For Me?” Which, from the buyer's point of view — means the seller has to provide a compelling reason why the buyer should be interested in what they are selling.

Wiifm?

When designing a new SFA/CRM program and looking for maximum sales adoption, management must answer the “What's In It For Me” questions presented from the sales reps' perspective. A well designed and implemented SFA/CRM program should:

- Help the sales rep close more business and make more money
- Make it easier for the sales rep to become more productive
- Reduce the unproductive paperwork that a sales rep dreads filling out and decrease the number of calls from management about account status.

In order to make this a reality, several very important requirements must be met:

1. All qualified leads sent to sales must be delivered in the SFA/CRM software. Although notification that a sales rep has a new lead may take place via other methods: FAX, Phone or Email, the rep must log into the software to retrieve the actual detailed information about the new lead.
2. All forecast information from sales must be accomplished in the SFA/CRM software. Under no circumstances should the management accept a forecast report outside of the SFA/CRM software; i.e. in Excel or via an email. There are two key reasons

For this: First, it improves the accuracy and productivity of the forecast reporting process. Second, when Excel is used, for instance, an administrative-level resource is often required to compile the various sales reps' information into one report. This is unproductive and time consuming.

- 3. The software should incorporate automated processes to ensure that no accounts "fall through the cracks." For instance, once a sales inquiry has been qualified and sent to sales, a task to call the prospect can be automatically set for the assigned sales rep for one day after assignment. Or, after a sales demo, the software can initiate a literature request and schedule a follow-up call.
- 4. Whenever possible, incorporate required call activity and/or account activity reporting into the software instead of demanding separate reporting. Both Sales and Marketing can use this information to become more successful. Marketing must use the SFA/CRM information to create more qualified leads for sales. Using the information from the account profile information and forecast reporting (primarily account status information), marketing can more easily track which programs are working best to generate the most and best leads for sales. The outcome is that sales increase, and marketing programs become more successful and efficient.

3. Management gets what it INspects, not what it EXpects



It's one thing to set up the software correctly to accomplish desired objectives from using SFA/CRM software. If, however, the company's management does not monitor the use of the software's and hold both marketing and sales accountable for its use and standards of accuracy in the software, the project is doomed to fail. In a recent Harvard Business review article, it highlighted a case where sales people were not paid commissions if the SFA software was not updated and used properly. Has there ever been a better incentive for sales to use it!

If the sales people see a consistent management commitment to the software and the results, as well as the reporting it generates, they'll be much more motivated to use it. And, of course, if they see increased sales and commissions that are attributable to the software, they'll be delighted to adopt it and make sure they recommend ways to make it even better.

For more information on how to increase the value of your company, please contact The Velos Group today at 714-544-1003 or mark@velosgroup.com.

email: mark@velosgroup.com
phone: 714-544-1003
web: <http://www.velosgroup.com>


Identify Your
Ideal Prospects!

- Half-hour 'Ideal Prospect' identification session
- 100 free prospect records
- Call us NOW for Details: (714) 544-1003
- *Company must have at least five (5) sales reps.

[Visit our Website...](#)

Offer Expires: October 31, 2006

Forward email

 **SafeUnsubscribe™**
This email was sent to mark@velosgroup.com, by mark@velosgroup.com
[Update Profile/Email Address](#) | Instant removal with [SafeUnsubscribe™](#) | [Privacy Policy](#).



The Velos Group, Inc. | 13562 Epping Way | Tustin | CA | 92780