

Sales Software - How To Determine If It's Pushing You Forward Or Holding You Back

By Patrick Cahill

Professional service providers can now use sales technology (such as Salesforce.com) to become lead generating and nurturing machines. Automated timed e-mails, the distribution of new leads to the proper sales professionals, follow-up reminders, and the recording of e-mail communication with leads are just some examples of how the right sales software can help business developers sell more.

Unfortunately, some service firms I have worked with look at their sales technology as a hindrance or as something to train for when one "has the time." If the talk around your company's water cooler touches upon such things, it's time to take a step back and think: Do people like to complain or is our sales technology slowing business down?

How do you begin to answer this question? Let's evaluate your sales technology with some key questions and decide if you've got a bunch of complainers or legitimately frustrated business developers.

The key aspects:

- Ease of Use
- Time
- Integration
- Accessibility
- Scalability

Before we delve into these topics, note that some issues may not require new software. You might simply need to train your people or optimize your software.

Ease of Use

Question: Do the professionals using the sales software understand how to use it?

An organization should use its sales software at all stages of its sales cycle. The ease of use directly correlates with the frequency records are updated and the likelihood users will adopt it across an organization. Is one record crossing over a series of professionals within an organization? If so, each professional needs to know how to access and update a record.

As organizations grow larger and number of users that must access records increases, so does the likelihood that mistakes will be made and data will be entered incorrectly or misplaced. Your sales software should capture all information that is required while still maintaining a simple, logical structure that can be followed after basic training.

Bottom Line: Each person who touches a lead should know how to use your sales software due to established training as well as a simple and logical approach to collecting required information.

Question: Do we have someone, internal or external, who is an advanced user/trouble shooter?

Advanced users are resources for your professionals and should lead your professionals' training sessions.

Additionally, technology occasionally goes awry once in a while and you'll need someone to address those issues. Whether it's an internal resource (ideally) or a fast responding external resource, you should know who can help with quick fixes to limit the frustration (loss of revenue) caused by "down time."

Bottom Line: Your company needs an advanced user to train others, share expertise, and maintain and improve your sales software.

Time

Question: How much time is being spent entering and accessing record data?

Your professionals are busy. Having a system that allows them to enter, lookup, and edit information quickly is vital to their adoption and the overall integrity of your data.

It is important to create time efficient processes for entering data that all professionals understand. This will help avoid inconsistencies, incomplete entries, and confusion. One short-cut/workaround can lead to real headaches down the road. It is important that efficient, agreed upon, and understood universal processes are adopted to minimize the development of efficient, understood, and not so agreed upon short-cuts. Universal company processes will save time and, if properly developed, make the sales software easier to use.

Bottom Line: It is in the company's best interest to create systems that allow users to quickly add data. The faster data is entered, the more likely users will take the time to do it right.

Integration

Question: Is the sales software a true part of the current sales process?

The sales software should be an active part of your sales process and not used for the sake of recording names. Successful adoption requires that the software become an integral part of the sales process. It is the resource your professionals access for current, relevant, and helpful information regarding leads.

Developing the sales software into an active and integral part of your sales culture can be difficult for some organizations. Think of the fax machine, one fax machine by

itself is worthless. When you have a second, things start to get a little more interesting. When you have 1,000 fax machines, its value starts to become pretty apparent. Integrating your sales software can be similar. If one person feels he is the only one entering information, there is little value in running reports, checking if someone has already spoken to a lead, and setting up reminders for peers. If he knows that there are another three or twenty people using the software and he often finds notes about a lead, direct phone number, old e-mails, or even a proposal from a couple for years back – he's going to check it each time before he makes a call. And he'll update it after the call as well.

You can help jump start this process of adoption by using the software to drive the reports during pipeline meetings, create monthly lead and client reports, and to monitor (and perhaps, reward for) the amount of sales activity being recorded within the software. Utilizing the software to drive reports and as a resource during meetings, professionals will realize the commitment of firm leadership to using it to develop greater sales intelligence and the power of the software to do so.

To avoid revamping your current, successful sales model, your software must mold itself to the sales process and not visa versa. Small changes are expected to meet the needs of the software's architecture, but make sure the software does not change the very nature of your successful sales culture. A properly integrated system will naturally flow with the sales process and, as a result, it will take less time to navigate and input information.

Bottom Line: Sales software needs to mold itself to and become part of the sales process in order to experience its value and importance.

Accessibility

Question: Can my business developer access the software when they need it?

Professionals will need to access information and create new records easily, whether they are using a WiFi network in Hong Kong or sitting at their desk. Many business developers travel and they need access to the sales software wherever they go. A system that does not provide remote access is not molding itself to the sales process and will not be adopted whole heartedly by your sales team. They won't be able to afford to.

Bottom Line: Sales professionals need to access their sales software anywhere, anytime.

Scalability

Question: Does my sales software fit our current size? Will it in the future?

The successful implementation and utilization of software will lead to better sales, stronger growth, which will eventually create a need for a more robust system.

Sometimes the complexity of your company's needs (e.g. workflows, marketing tracking, and amount of information required) makes it necessary to upgrade. A careful evaluation of your company's current (and projected) situation will help determine what you need to do to successfully integrate your company's sales software. If you choose not to upgrade, you may let a simple piece of software stagnate your growth and profitability.

Having those "expert" users can help adjust your software to accommodate growth changes as well as evaluate new software when the situation requires.

Bottom Line: There is a variety of sales software to choose from. Make sure you have the one made for your size and set of needs.

Bottom Line - It's a Process

It is essential to that you take a step back and determine if you need to improve or replace your sales software. Properly implemented and utilized sales software can increase your profitability, increase your company intelligence, and decrease the number of complaints around the water cooler (Well, at least about your software. Now let's do something about those chairs...).

About the Author

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