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SALES FORCE AUTOMATION - COMMON MYTHS

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1 THE COMMON MYTHS ABOUT SALES FORCE AUTOMATION AND CRM.

Run a web search for the term sales force automation (SFA) and you will get a raft of results within a split second. It's a well-known concept, often joined at the hip with CRM, and the benefits it can bring are clearly documented and well debated.

While the end-to-end scope of sales force automation is broad, the bare bones of its attraction, for most organizations, lie in the promise of being able to get their hands on accurate sales forecasts, meaningful pipeline data and real insights into sales deals. But for many who come to SFA with such hopes there is often disappointment. In our experience, there are three common myths that are to blame.

2 MYTH 1 – The Sales Force will Love it!

Here's a blunt fact – for most sales people, CRM and sales force automation systems bring little value. For them, these systems are nothing more than a way for management to get the reports they want but they bring little value when it comes closing deals and winning business. In fact, most sales people believe that such solutions detract from their day-to-day job, making them data entry clerks not deal makers!

Brutal but true – traditional CRM and SFA solutions bring little to the table when it comes to “what's in it for me” for the sales team - which means, sales people don't like them and don't use them.

3 MYTH 2- FORECASTS WILL BE GREAT – WELL ACCURATE AT LEAST!

It's a vicious circle –if the sales force doesn't use it and don't like it then the likelihood of accurate forecasts and meaningful pipeline data from a CRM or SFA system is just about nil. If you think differently we challenge you to look at your CRM

data today and see how many deals have a forecasted close date that has passed or look to see the last time a deal forecasted to close next quarter was updated!

And, even if a sales person diligently does put the data in, it usually gets manipulated along the chain of management until it bears only a fleeting resemblance to the information entered. The usual sequence of sales forecasting events can look something like this;

- the sales rep provides the forecast,
- the sales manager adjusts it,
- the sales operation manager re-adjusts it,
- the director of finance does his own!

4 MYTH 3 – THERE’S AN APP FOR THAT

In today’s world of “there’s an app for that” it’s easy to think that technology has got so smart that it can solve problems alone. Surely if we put in the right CRM or SFA technology our problems will be solved?

Not so – not yesterday, not today, and not tomorrow. Good technology will aide and enhance CRM and SFA projects but as standalone solutions, not augmented by change management, process improvement, engagement and leadership, they become nothing more than data capture tools that will quickly become redundant.

5 SO WHY BOTHER?

Would it not just be best to forget about the glory and Promised Land of accurate forecasts, meaningful pipeline data and real insights into sales deals? No, because in reality this sort of information is not optional when it comes to running a successful business.

But take heart – just as there are common myths there are also clear solutions and here is what they are:-

6 MAKE IT MATTER

Address the “what’s in it for me” issue. If you want your sales force to live and breathe your SFA or CRM system then you have to ensure it enhances not detracts from their job.

How do you do this? A well proven approach is to embed intelligent sales methodology and sales process best practice into your CRM and SFA solutions. In short tools that really help the sales team navigate through the sales process and guide them to win the deal. Tools that are mapped to the customer buying process and use embedded methodology and smart reasoning to help sales people gain control of the sale and build an opportunity plan to win.

Time and time again, embedding intelligent sales methodology into CRM solutions has proven to deliver value in the eyes of the sales person answering the “what’s in it for me” catch cry. The result is high solution adoption and real accurate information that can reliably be used to run the business.

7 MAKE IT MODERN, MAKE IT MOBILE

Fact – if I can’t access and update it in the normal course of my every day work life then I simply am not going to use it. If you think this is true then ask yourself this - where to sales people spend most of their time? Answer, on the road of course. It might sound like a no brainer but if your CRM or SFA system doesn’t work on the road it won’t be used. Mobile access from modern interfaces such as Ipad and

tablets is mandatory. If people can use the solutions in the environments they work, and with their tools of choice, they are must more likely to embrace them.

8 MAKE IT WORK – FOR ME

If you want people to adopt a new solution it's really helpful if it seems familiar and easy to use. Look and feel, navigation and simple things like standard buttons for key actions like, save, close, cancel, make a difference to how quickly people adjust to a new solution – and the quicker they adjust the faster it becomes embedded in their work processes. Don't under estimate the importance of familiar user interfaces when trying to drive adoption – especially with sales teams.

Secondly, the more you can make the solution a single port of call for your sales teams' informational needs the quicker they will embrace it. From calendar, to contacts, to contract if it's all integrated with and accessed from your CRM or SFA solution the more value it brings.

Simple things that speed adoption, make the solution sticky and leave the team free to sell!.

9 IN CLOSING

While the road of CRM and SFA is well trodden there are many that never reached their desired destination and in nearly every case one or more of the three common myths are to blame.

Here at Storm have hard won experience and expertise in helping companies tackle these issues head on. We work with organization across the nation helping design and implement CRM and SFA strategies that work. We are proud to be Ireland's only company to integrate the Microsoft Dynamics CRM solution with the Dealmaker®

sales effectiveness solution - bringing to market a solution that successfully challenges and overcomes each of the mis-perceptions that have traditionally thwarted successful projects.

Interested? – Then we'd like to hear from you. Email or call me direct on 01 416 1226 or rohalloran@storm.ie.