SalesLogix

Customer Relationship Management

Sales Enablement:
User Acceptance Means More Sales

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Sales Enablement: User Acceptance Means More Sales

To achieve the increases in productivity that lead to rising revenues, sales force acceptance and usage of the sales component of a CRM system is crucial.

Salespeople are the heart of any company. More significantly, productive salespeople are often the difference between company success and failure. Sales force automation has been used to drive sales force 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, focused instead on optimizing the productive interaction between the salesperson and the customer. This sales enablement addresses what is often a thin line between business success and failure, the difference being sometimes 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.

Sales enablement is targeted to meet not just the needs of senior management, but also the salesperson. This paper will outline 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 sales 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 the efficiencies of sales management. That meant features like solid forecasting and tools that made the pipeline easy to see and administer were paramount. Other less important features were included such as a few usable screens for salespeople and automation of as many processes as possible. Attempts were made to reduce the time a salesperson 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, salespeople universally resisted the change. They didn't see using sales force automation as much more than allowing their senior management visibility into what they were doing. What was great for their executive staff hardly seemed to be a productivity benefit for the salespeople. While this perception was not entirely true, it had some merit. The tools that sales force automation provided, while valuable to the sales teams, were not salesperson friendly. Therefore acceptance by sales personnel was less universal than desired.

User acceptance issues were also different from market segment to market segment. For example, the small- to mid-sized business (SMB) segment needed to be addressed as a separate market from the enterprise segment. Just transposing sales force automation from the larger enterprise to the SMB didn't work. The features and applications to make the sales teams productive in a $7 billion company were considerably different than for the $10 million or $250 million company.

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

Usability vs. Functionality: First Things First

Inclusion of hundreds of functions without regard to their overall or individual value does not produce a more powerful or productive CRM experience.

There has been an ongoing discussion about CRM usability versus functionality. Functionality is defined as the feature set of any given application. Yet, a function or feature, in and of itself, has no real value for a user. Inclusion of hundreds of functions without regard to their overall or individual value does not produce a more powerful or productive CRM experience.

Reality Is Different

What makes a CRM application viable is the usability of important features. This is far more important than the total possible functions available in the application. 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 positioned 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?

User Self-Interest Drives Sustainable Sales Performance

If the individual receives value from the CRM system then they will use it.

There are two ways to differentiate functionality versus usability in the world of sales enablement. First, recognize that the cardinal principle of salesperson acceptance is embedded in individual self-interest. That does not mean corporate self-interest, departmental self-interest, or sales force interest. It means that which makes a single person a supportive participant. If the individual receives 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 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 spreadsheets 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 catalyze the relationship between the account owner and the account, then the CRM system has value to the company.

Understanding Customer Relationships: A Change Will Do You Good

Good salespeople 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 inquiry, then an opportunity. And, most organizations find relationships considerably more profitable after the initial sale.

This is leading to a change in sales force automation and leading us toward sales enablement. Traditional sales force automation has been aimed at the vice president of sales or sales directors or those who are interested in pipeline management. Of course, there has been substantial functionality that is aimed at the salesperson, 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 salesperson. The sales force automation focus on sales management is shifting to the sales enablement focus on the customer relationship.

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User Acceptance and Usability

What are these changes that have to be made to sales force automation to make it useable for salespeople? There are functions and then there are usable features. Usable features are those functions that are likely to be regularly used by a majority of the users and are in their self-interest to use. Below 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 usable. 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 application more of a pleasure than a chore. If it is not only easy to use, but visually appealing and uncluttered then 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 all that frequently used. Yet, it is useful and actually can make a salesperson more effective to have easy lookups on all the fields of an application. Ultimately, a salesperson 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 outlook and Lotus Notes

This is a mission critical feature. There are over 150 million people who are using Outlook and Lotus Notes combined. There is no company that uses these mission critical e-mail applications that would be willing to stop using them for the benefit of the CRM package. That is no option. That means seamless, easy integration between these applications and the customer-facing CRM application – it is something that is extremely important to the sales team members.

Seamless Integration with Back Office

Access to back office information needs to be transparent to the salesperson, not requiring them to leave the familiar environment of the sales automation application.

For salespeople 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, catalog look-ups and product inventory status. This access to back office information needs to be transparent to the salesperson, not requiring them to leave the familiar environment of the sales automation application. Seamless integration is a critical factor in improving salesperson effectiveness. The less time a salesperson 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.

The sales application must be designed to provide seamless integration with the organization’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 Processes 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 practices and sustainable business processes are going to be embedded in any CRM application. That is part of the functionality. An extremely important part of making the salesperson comfortable is a CRM system that is adaptable to those unique business processes. What makes the system usable is the degree of flexibility to

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mold to the organization'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 organization grows and acquires new processes.

Tools That Enhance Interactions with the Customers

These are essential sales productivity tools. For example, having access to your prospects and customers with multiple communications channels (Web, phone, e-mail, 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 salesperson, 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 customers and prospects is very valuable to an organization's sales people, especially those that deal with hundreds or thousands of prospects a year.

High Level of Personalization So That the Individual Salespeople Can Have a System That Is "Theirs"

Each human has a personality that is unique. This means that each human is comfortable doing that which does not necessarily make another person comfortable. On the other hand, in a corporation, it is clear that there needs to be universal business procedures (best practices) that govern the general method of doing corporate business. Custom configuration, or personalization, is the answer. It means that the individual salesperson 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, sales letters, and even screen colors that fit their own productivity style; not a rigid application that enforces its own concept of efficiency. (Note: this is not customization, which is traditionally not done by the end user but rather by the IT department.)

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. Corporations spend thousands of dollars to train their sales personnel in Solution Selling or Miller Heiman or other prominent methodologies. Many companies even develop their own unique selling methodologies developed over the years of selling in a particular industry. A good sales automation application will embed the best and most widely accepted sales methodologies or allow new ones to be easily created. The application should give the sales person the means to either access or ignore these methodologies. For the new salesperson, 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 PDAs, Tablet PCs and laptops.

An effective CRM application will provide today's highly mobile workforce access in both a connected or disconnected environment with PDAs, Tablet PCs and laptops. Mobile salespeople 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 synchronization.

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

The judgment as to which synchronization system best meets a particular company's needs is, of course, a business decision. It must support the overall goals of an organization, including providing salespeople with more time to sell and real-time access to customer information, fostering a more efficient sales process, and yielding up-to-the-minute and accurate forecasts. The synchronization system that best meets these needs best serves its users and owners.

The process of synchronization should be simple and fast. Users should have the choice to synchronize with the click of a toolbar button, or to automatically detect an Internet or network connection and synchronize in the background without any user intervention.

Conclusion

First salespeople accept the system; then, sales force productivity increases. Finally, sales force productivity drives sustainable sales performance.

Automating the sales organization is almost always the first task of any CRM initiative in the small and mid-sized business segment. Nearly 90 percent of all successful CRM implementations have sales automation installed. Over 90 percent of the CRM users in the small to mid-sized segment are sales users. Therefore, sales force enablement is a critical outcome to any CRM effort. The sales enablement value chain works like this: First salespeople accept the system; then, sales force productivity increases. Finally, sales force productivity drives sustainable sales performance.

Deliver a tool that provides your salespeople value and usability. In return, you will have a system that people actually use, and that is what ultimately benefits the entire organization. If a CRM solution is on the radar screen of your small to mid-sized company, then emphasize sales enablement. It is never too early to improve your revenue.

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