



MONDAY MOTIVATOR

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Sales Force Automation

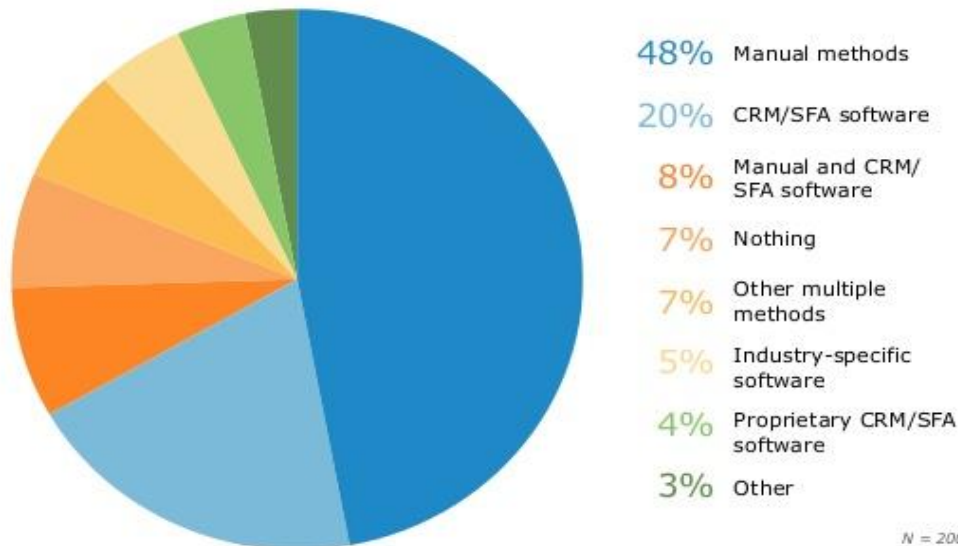
Monday Motivator is a weekly business journal aimed at senior managers. From CEOs to senior Vice Presidents, Directors, retail managers and supervisors, management is all about purpose, mission, strategy, action, staff guidance, leadership, communication, training, measuring and reporting. There are a few other issues that define the position of the sales manager. Perhaps one of the more important ones is that realm of activity tracking and reporting commonly referred to as Sales Force Automation (SFA). Reporting functions of SFA are one of the key features.



This edition will focus on a light overview of what SFA is and how it differs from CRM (Customer Relationship Management). Let's start with what SFA is. Sales force automation (SFA) software is a type of program that automates business tasks such as inventory control, sales processing, and tracking of customer interactions, as well as analyzing sales forecasts and performance. Businesses may have a custom version developed specifically for their needs, or choose from among a large array of sales automation software products. Some of the more familiar names include ACT, GoldMine, Pipedrive, Infusion Soft, Team Support, Fresh Desk, Prophet, Net Suite, Spice Works, Plan Plus Online, or Sales Force. And these are just a sampling of the many titles available for any business depending on needs, desires and budgets. You can see demos of all these and more such titles at: <http://www.softwareadvice.com/crm/>

It's easy to confuse SFA software with what is sometimes called customer relations management (CRM) software. CRM software consolidates customer information and documents into a single CRM database so business users can more easily access and manage it. The other main functions of such software include recording various customer interactions (over email, phone calls, social media or other channels, depending on system capabilities), automating various workflow processes such as tasks, calendars and alerts, and giving managers the ability to track performance and productivity based on information logged within the system. CRM is more widely seen in call centers where inbound calls arrive from customers seeking support for a product or service they have purchased.

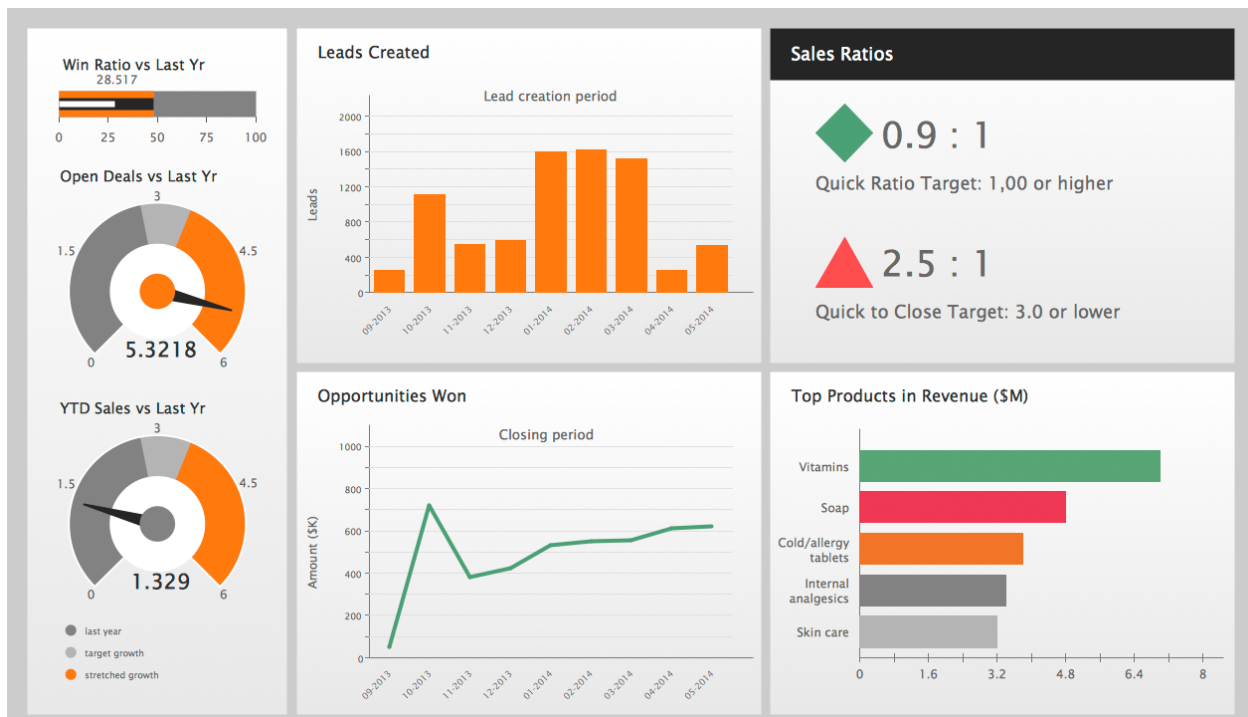
Many Still Use Manual Methods



While a third of buyers are currently using a CRM or SFA system, nearly half of buyers still rely on manual methods to manage their sales activities.

SFA software does pretty much the same with a few important exceptions. Here are the high points of what companies operating in the U.S.A. report when shopping for an SFA solution. So what key metrics do we see when senior management considers investing in a comprehensive measuring, tracking and reporting system?

- They want activity entry functions that sum up departments or sales territories / regions and report on such activities.
- They also want to see summaries of the various steps of customer interaction to show the success rates that point to conversions to sales, expansion of sales or customer retention.
- Most companies want real time reporting that allows more accurate forecasting of various metrics that show competitive positioning.
- Finally, all companies looking at SFA / CRM software solutions want to know where they need to make corrections, implement training or consider staffing changes as a result of the reports.



Sales force automation software is meant to help sales teams close more deals and reduce the number of time-consuming tasks associated with selling. Savvy businesses recognize its value for streamlining the sales process, gaining visibility into the sales pipeline and providing real-time data to help sales managers quickly make informed decisions. SFA software can also help companies maximize profits by using fewer people to get more done in less time.

However, SFA is just one part of the greater customer relationship management (CRM) software market. There are many products available, which can make purchase decisions quite complex.

This is particularly true for small-business buyers, who may have different needs than buyers from larger organizations. Within sales teams, there are often systemic issues that make using such software—and getting sales reps to use it—even more challenging.

There are two considerations to take into account once the decision has been made to utilize SFA and or CRM packages enterprise wide:

- A. Make the use of such tools mandatory. Do not allow it to be optional. Every sales manager up and down the org chart must sign on to make the corporate investment do its job.
- B. Training is absolutely essential. SFA / CRM apps are not that simple to use. Our firm has delivered training programs on ACT, Goldmine, Sales Force and a few others. To say the least, such programs require dozens of hours of classroom time with online coaching and webinar support to keep the initial adoption rate and day to day utilization moving forward. This is all focused on getting the whole retail enterprise on board, no matter whether the company value proposition is products, services, or both.

In summary, there are basically four key benefits of a well-designed SFA / CRM program. Ease of Use, Good Functionality, Flexibility and Customization and Additional User Resources.

Until next week, if you know of any business that would benefit with a little coaching in the areas of organization, time and task management, social media, sales, marketing, customer service, operations, HR, leadership or team-building, have them give us a call at 562-577-7000 or send us an email. We will keep you in the loop on how it's going.

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Our consulting and coaching focus supports management, sales, customer service and operations. Included are sales and management assessment surveys as well as leadership, teambuilding, sales operations efficiency and online tracking projects. Our other team members bring additional disciplines as well. We will showcase them in future editions of this business journal. We are all committed to driving the results you want.