



Best Practices in

# sales force AUTOMATION



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# CRM: HELPING SALESPEOPLE Sell

There is an odd notion in many IT departments that the salespeople in their organization are all the same.

This thinking is flawed, of course. Yet when IT departments install the organization's sales force automation (SFA) software, they tend to lock the customer data grid into specific categories, which in turn locks the ways the information can be filtered.

The information the salespeople need may be in the system, but it may not be selectable in an efficient manner for the salesperson.

Now imagine if every salesperson had the ability to create a dashboard to suit his or her working style.

This capability is now being offered as part of the next generation of sales force automation in CRM software. It is simplifying the entire sales process, and making sure salespeople have what they need when they need it, even if they didn't need it before.

## IT AND SALES: DIFFERENT CREATURES

IT experts like to have everything planned and plotted long before beginning the work. They want to take the input from multiple resources (including the users), create a scope of work that includes all possible parameters, and then execute against the plan. Once an application is set up, they don't want to go back and keep reworking it, especially if it's only to suit one person at a time.

Salespeople, on the other hand, like to work on the fly. They typically focus on one opportunity at a time, day by day, which means much of the preparation work

for their next sales call is performed at the last minute.

In addition, salespeople generally have little interest in detailed, tedious work. Yet detailed and tedious describes SQL (and other database programming) perfectly. In short, the differences in the way IT and sales work assures that neither department is completely happy.

## UNEASY CUSTOMIZATION

Most CRM software now includes some ability for salespeople to customize the way they retrieve data. Unfortunately, these capabilities tend to be complex and limited.

For example, there are query wizards built into the software. However, wizards tend to be built by software programmers, who think like software programmers not salespeople. They apply a logical approach with steps that may seem straightforward to them but that may still be well outside a salesperson's approach or comfort level.

Sometimes the software includes a set of SFA tools that allow further customization. These tools often seem simple to a programmer, but may be quite foreign to a salesperson. As a result, they still do not give the salespeople what they need to do their jobs the way they want—and need—to do them.

## IMPROVING THE PROCESS

What is really needed is a set of powerful, flexible SFA tools that do all the hard work behind the scenes while users point and click to accomplish what they want. These tools are now becoming available in the latest generation of CRM software. They are giving salespeople the ability to take control over what infor-

mation they store and how they're able to retrieve it. They're helping salespeople automate mundane tasks, taking care of the details so the salespeople can remain focused on the thing they're really paid for—the art of the sale.

On the front end of the sales cycle, opening up the customer data grid without the need for IT intervention allows salespeople to create the exact system they need. It's as easy to use as a spreadsheet.

Where these tools really become time-savers is in the ability to go deeper in the sales cycle than ever before. Previously, SFA tools were limited to setting up macros/quick actions (such as setting a recall date for two days from now) or business rules (such as "call this group of people on these days"). Now, however, they have gone to a third level, becoming a true business process engine that helps automate the entire value chain.

All of these abilities allow salespeople to spend their time focusing on the relationship-building required for success in long sales cycles, and/or to generate steady repeat business in industries with shorter sales cycles, rather than worrying about finishing necessary but distracting tasks.

That's a formula that should keep everyone happy. ■

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