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Sell Your Salesforce on the Importance of Sharing Information

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It was a cool, crisp New England autumn day when I got word from my client (John, the senior vice president of sales at a midsize professional services company) that he was finally ready to address his underutilized, much maligned $4.8 million sales automation application. I remember the details of the weather so clearly because we had been in an offsite leadership meeting where I was brought in to help the leadership team conceptualize a customer strategy.

We were holding one of our key strategy sessions outside, and the glorious weather really helped spur those creative juices. Plus it helped remind the group that 4Q was rapidly approaching. The team was well beyond the business approach and was, in fact, fully invested in the idea of transforming the company's people, processes and technology to be customer-centric. The group was beginning to brainstorm on some high-level implementation ideas when the participants had a collective "ah ha" moment: The sales reps could be an invaluable source of information for the entire company if they would only use the darned system. Sales forecasting and pipeline management aside (John's reasons for originally implementing the system), the system could provide critical information that customer service and marketing could use to help better engage with and transact to full and service customers. The group finally understood what a common customer "infrastructure" could do. Eureka!

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But there was one small problem: The sales reps absolutely refused to use the system except for what they were incented to do. In this case, John thought he was doing the right thing by building system utilization into his sales incentive programs. He structured the quarterly bonus so that reps could attain full payout only if all their deals were entered correctly into the system by midnight on the last day of each month. John wanted the sales teams to be entering deals all month long so that he and his managers could monitor pipeline progress. However, the sales reps felt the system was managerial overhead that didn't help them spend more time in the field. So they did exactly what the bonus program incented them to do: spend the last day of the month entering all their transactions into the system to meet the bonus requirements. You can imagine how much members of the sales team enjoyed being forced to choose whether to spend the last day of the month locked in their offices pounding their laptops to get a bonus or out closing last minute deals. I can tell you that the decision wasn't always a no-brainer.

Getting serious

So back at the offsite, we all knew that the sales system itself had marketing and customer service functions which could be enabled. So when it because clear that lovely autumn day that the John's system could potentially be a powerful force for good in the company, he knew it was time to get serious about getting his team to really use it.

He faced many challenges along the way, not the least of which was getting his sales reps to actually understand that they didn't own the customer relationships and that they had to share this information for the good of the company. Together we approached this problem from many different angles. Here are just a few areas we covered, but they are important:

- **Align sales compensation with strategic goals.** Variable compensation must be designed to underscore corporate direction and motivate desired behaviors. For example, if a company is attempting to boost sales of a particular product, targets must be specifically assigned and the compensation plan must financially reward sales of that product. The same is true with getting sales reps to use the system regularly: Bonus them for daily use of the system.

- **Create an environment of criticality and extreme visibility.** Sales reps must be prepared to have their pipelines interrogated on a number of levels, including all levels of sales management. The most critical element to system adoption: periodic unexpected phone calls from the executive team to field sales reps and sales management to discuss accounts or express interest in metrics/rankings.

- **Train sales to use system-enabled processes, not the system.** Pure systems training (learning features and keystrokes in a classroom) is fairly useless. Organizations must approach training from a process point of view, where the technology is baked directly into the DNA of the sales process and is just one of several process enablers.

- **Adopt a shared sales methodology.** No SFA/CRM system on the planet can mitigate inconsistent or non-existent sales processes. Sales organizations tend to have too many methodologies or none at all—or a methodology specifying only coarse-grained sales stages, resulting in sales reps having to fend for themselves when it comes to determining how to execute the stage.

- **Implement structured and semi-structured workflows.** There are two big problems that often accompany automating methodology in the field:
    - Overly structured sales stage workflows fail to accommodate differing sales situations and account nuances, causing sales reps to work outside of the system
    - There is no definition of sales stage activity and associated workflow, causing sales reps to create their own ad hoc activity flow, which leads to lost leverage.

The special sauce is structuring sales stages while defining semi-structured sales stage activities using templates. In this way, sales reps can adapt templated, semi-structured workflow to their particular sales scenario, eliminating the ad hoc leverage problem, while the structured sales stage creates a consistent "lens" to assess sales team productivity.

It took a full fiscal year of constant reinforcement for the sales reps to finally consider the system as just another arrow in their quivers. Concurrently, the enterprise was implementing similar programs in marketing and customer service, as well as working tirelessly on a cultural overhaul. By the following autumn's offsite (which featured rainy and cold weather), the executive leadership team was able to assess its progress toward customer-centricity, rather than just dream about it. So although the weather wasn't great, the outlook was sunny.