

Introduction to CRM Sales Force Automation

Salesboom.com

Salesboom CRM system is the vehicle for sales force automation. By investing in an online CRM system, you can bring your sales, marketing, support and even back-end business lines under one umbrella.



Table of Contents

- 1.0 SALES METHODOLOGY..... 3
- 2.0 CASE FOR SALES FORCE AUTOMATION..... 4
- 3.0 FLEXIBILITY OF ON-DEMAND CRM..... 5
- 4.0 SOLUTION SELLING IN ONLINE CRM SYSTEMS 6
- 5.0 FRONT AND BACK END CRM SOLUTIONS..... 7
- 6.0 CONTACT US..... 8
- 7.0 MORE INFORMATION 8

1.0 SALES METHODOLOGY

CRM system is the vehicle for sales force automation. By investing in an online CRM system, you can bring your sales, marketing, support and even back-end business lines under one umbrella with Top Sales Force Automation Systems.

As an enterprise business solution, on-demand CRM is cost efficient, and requires reasonable investment in terms of training to upgrade to an automated sales force. This is good news for any business looking to adopt and evolve business intelligence using CRM software systems.

All sales components have some kind of formalized sales process in place which provides a common language and terms of reference within which to work. These processes may be very simple, or can be very complex, or direct, fast moving, lengthy, sophisticated, whatever it takes to sell your product or service. This process, or Sales Methodology, is the backbone of the company's finances and future. In acknowledgment of the importance of correctly identifying the sales process, much time is spent in massaging marketing and sales activities to convert leads into sales. When you take the time to study and document your marketing and sales activities, you are developing your Sales Methodology. Because the sales approach in a CRM Software is tailored to each individual business product or service, there is no one size fits all standard Sales Methodology.

There are, however, a number of best practices in developing a Sales Methodology that are acknowledged in the marketing and sales world as business solutions. Some of these accepted practices can include any or all of the following activities.

- Clearly defining and promoting your product or service value proposition to potential buyers. (Your value proposition must clearly state the benefits your customer will receive from becoming one of your valued clients. This statement or proposition should be specific and clear to you, your team and your customers.)
- Developing a sales plan that your team can reasonably implement. This means correctly identifying your market segment and defining realistic sales goals for you or your team to shoot for.
- Identifying, reinforcing and reviewing your sales priorities and objectives on a regular basis to channel sales efforts properly and efficiently.
- Having a process to define, review and acknowledge achievements.
- Identifying roles and responsibilities clearly for your team.
- Facilitate business intelligence strategies to enhance customer retention and identify market competition/opportunities.

Each aspect of your Sales Methodology approach can now be layered with the details specific to your industry or service. Customization of the Sales Methodology is also standard practice and is as individual as you and your product or service can possibly be. Some of the reasons to undertake this initiative are:

- To improve qualification and sales effectiveness
- Identify and customize sales functions and to facilitate uptake of the sales functions in change scenarios
- To offer standards in the sales process to identify correct steps in sales activities and to generate a common language amongst team members to promote clarity in communications.
- To further develop and leverage your service value proposition(s).
- To develop a means to capture information to enable you to see your track record, do forecasting, look at other processes that need alignment or reworking.

2.0 CASE FOR SALES FORCE AUTOMATION

This is also the phase where the process can run into significant trouble and expense due to a number of reasons, some of which may be:

- Inadequate qualification
- Despite developing your Sales Methodology, the process is inefficient and under productive because real decision makers are not properly identified and brought into the process early enough.
- The team is uncoordinated and sales efforts diminished as a result.

Even when you take the time to identify and develop a Sales Methodology, and still have disappointing results, it is not actually all that uncommon and further steps can be taken. One of the options you may wish to explore is to automate your Sales Methodology within a CRM software application. Customer Relationship Software systems are becoming fairly standard business practice in today's customer centric organizations. The benefits of Sales Process Automation in a CRM could include:

- Having a mechanism by which to assess your current marketing and sales effectiveness
- You would be better able to identify buying processes
- You could embed steps in the process to ensure appropriate help is available at any time to support the qualification and sales efforts
- You can develop a library of information that identifies a customer's needs, preferences and behaviour to assist in developing your value added service for each customer

- To have capacity to pull metrics from the system to aid in making and refining decisions
- To identify steps, roles and responsibilities in the sales process that encourage inclusion of all the sales team members at appropriate times
- You can appropriately identify training needs and sales excellence at any point in the process

A responsive on-demand CRM system can automate and enhance business processes, sales activities and analysis, and decision making processes for businesses quickly and efficiently. This capacity places powerful tools in the hands of the company decision makers and constitutes a significant savings potential and increased efficiency.

3.0 FLEXIBILITY OF ON-DEMAND CRM

The latest on demand CRM systems have improved security that guarantees data integrity. The newer systems offer functionality that enables you to refine access to information in your organization on a 'need to know' basis. It allows you to define reporting structures, integrate permissions based on function, respond to and adjust access requests quickly and efficiently. There are no data leaks as a result, and there are migration options should you decide to exit the system.

You should look for Audit Trail functionality that provides real time reporting that details transactions and transaction owner for any object item in the system. This provides a means to identify and correct any unwanted activities in the system, and thereby aids in supporting your security audits.

If you choose to maintain external information systems and want to link your on demand CRM system to existing holdings, you can explore the possibilities of API integrations. For instance, you might want to integrate CRM services with your Blackberry units out in the field. This can be done securely and efficiently with appropriate due diligence and consultation. The best deployment of on demand systems though, are situations where the Sales Methodologies are clearly defined, there is a commitment to map these processes into the CRM system, there is a commitment to manage change and training issues, and intention to use the on demand system as an end-to-end solution where this functionality is offered in on-demand CRM systems.

To automate your Sales Methodology, you will require access to a system that has integrated Project Management tools. The tools should facilitate collaboration, help you to align your resources and manage your sales goals. Optimally, you would also have access within the tools set to workflow functionality and good reporting and tracking functions as well.

4.0 SOLUTION SELLING IN ONLINE CRM SYSTEMS

If you have identified Solution Selling as one of your company's goals, an automated system with the functionality described above, would compliment your efforts greatly. Solution Selling is a sales methodology that systematizes processes that help members of your sales team collaborate and operate more as trusted advisors to your customers, in advancing solutions, making recommendations and enhancing sales campaigns and outcomes. Solution Selling fosters an environment that encourages consultation between you and your customer to discover solutions in mutually productive projects and an integrated on-demand system would be an optimal environment in which to foster this approach.

To manage Solution Selling and the activities that come under this umbrella, it is important to look at the Project Management Tools that an on demand CRM system must offer to support these types of sales initiatives.

First off, it is imperative for any Automated Sales Process to incorporate a set of flexible Project Management tools. In advancing Automated Sales Processes and Solution Selling within your organization, there will be change and uptake issues that can be compounded by inefficient and/or overly complicated tools and interfaces. It is important to take the time to explore the flexibility and adaptability of the PM tools offered, and to assess the interface for usability within your sales team.

The component behind the PM tools is workflow. Workflow is the platform behind the interface that maps your business process, including your sales methodologies, into the CRM System. When you set up your business process (BP), you incorporate all aspects of the sales process for automation. You are essentially building a framework in which your team will work, according to rules you have developed with the help of accepted best practices and your own experience. The workflow engine in the CRM system must accommodate your current activities and provide flexibility that can incorporate changes and enhancements to BP in the case of growth, refinement of BP and user requests.

Without workflow capacity, it is virtually impossible for a CRM system to advance automated Sales and Team Selling. The workflow process can capture each step, plan for exceptions, accommodate process change and foster team interaction by giving the user control over his or her sales environment. The workflow process incorporates Project Management tools that enable capacity for managing the information coming in from the front line sales force in the context of marketing efforts, and where possible, inventory and billing activities.

On undertaking Sales force Automation you acquire a single holding for information coming into the system. This avoids the creation of information silos and necessity of bridging various systems to acquire accurate metrics for your sales and business activities. Your CRM has not only automated your Sales Processes, it has captured all information in one place where it can be extracted in various forms in support of decision making, forecasting, reporting, projections and so forth.

5.0 FRONT AND BACK END CRM SOLUTIONS

With the acquisition of a CRM system, you have acquired tools for your workforce that integrates information sources from Marketing and Sales efforts and optimally can provide integrated back end capacity for rich accounting and inventory management services from within the system. The excellence in going to an on demand system is that it facilitates an organization's ability to be able to:

- Ride out resource change over
- Accommodate expanding and contracting workforce based on campaign
- Circumnavigate bottlenecks
- Foster teamwork
- Attend business, sales, inventory and administration activities, all from within one system.

In choosing an on demand CRM system that is flexible and can grow, you have the advantage to build information holdings, train your sales team in an efficient and productive environment, acquire a set of sophisticated PM tools, and grow your CRM capacity as needed. An on demand CRM system can be as robust as you and your team need in the time frames you need. This translates easily into savings all the way from acquisition, to training, to improved efficiency and accuracy, to growth initiatives. It is a matter of taking the time to do the numbers, factor in your business activities and assess the possibilities for BP streamlining and operational savings.

6.0 CONTACT US

Salesboom.com

sales@salesboom.com

617-600-7989

7.0 MORE INFORMATION

For more information regarding our products and services please visit our site at:

<http://www.salesboom.com>