

## **Improving Your Sales Force's Effectiveness through Automation**

Many smaller businesses have advanced beyond back office automation using PCs and client-server IS platforms. More owners are looking at advanced sales automation software as a way of improving the productivity of their sales force as well as customer satisfaction.

Salespeople are often more resistant to using PCs compared with those working in finance, logistics, materials management and other functions. Thus, business owners need to sell the benefits of automation to both their sales managers and reps. Sales has long been considered more of an art than a science, which explains part of the resistance. Also, some businesses find themselves with older reps who, though they have critical industry knowledge, did not grow up with computers.

You *could* just load up each rep with a laptop and all the accoutrements:

- sales management software, including automated fax and e-mail capabilities
- groupware for proposal and contact information sharing
- templates for contact reports and follow-up letters
- product, price and delivery information that can be called up via an intranet link.

Why not let them discover the value for themselves?

There's a good reason: Throwing sales automation software at the reps is no guarantee it will be used.

Sales automation software has been growing of late, with close to \$300 million a year in revenues. There's a reason: improved functionality and user-friendly features geared to what the reps consider *their* priority needs are the reasons behind the recent spurt in sales.

Before pushing sales automation on your reps and territory managers, conduct an audit within the company. Here are some key steps to take:

- Ask your reps what they consider to be their three priority tasks in the field. Ask for their recommendations on how to improve their productivity. For example, which tasks are taking longer than they would like, or what are the bottlenecks they face in getting prompt and accurate information to prospective as well as current customers.
- Involve all of your key functional managers in a discussion of the order management and order fulfillment processes. Although sales force automation can begin with discrete tools such as contact management software, your business may really need a more integrated and more robust information systems architecture that will improve the *entire* order-to-delivery process chain in the company.
- Decide whether you should try to improve sales productivity as a single function or carry out a more extensive overhaul of your business' IS platform.
- When you survey vendor offerings, involve end-users in the discussion and trial testing of the software. Many off-the-shelf products allow sufficient customization for your needs. Some of the tools have more open-ended integration capabilities with other IS tools, and it is important to know how much integration is possible. You want to avoid investing in another legacy system that could end up walling sales off from other business functions.

Finally, even when software tools and other IS enhancements are the *right* solution for boosting sales productivity and customer satisfaction, that is no guarantee you will get buy-in from the sales force. You need to motivate use and experimentation.

Besides involving end-users in the discussion and evaluation of software choices before you commit to a vendor, there are three other steps you can take to assure that your reps accept the new system:

1. Assure the sales force that the time required for getting up to speed on the software will not reduce their income if they fail to make their sales numbers at the customary level. However, set a fixed period of time for the conversion to the new system.
2. Monitor the productivity payoff among the committed users, with before and after comparisons of their sales productivity. Productivity measures should not just focus on goods or services sold but include discrete task productivity, at least initially. For example, the time it takes to get letters written, or get correct pricing information out to customers. Then, communicate the benefits throughout the sales organization.
3. Go with a software vendor or systems integrator that will stay on board well beyond the installation to provide additional customization of the tool and training if needed.

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