Pivotal CRM

WHITE PAPER

CRM Built for Sales

The Executive Guide to Selecting CRM that Meets Sales Needs

Part 1 of the "CRM Built for Me" Series

Executive Summary

Even the best CRM system is only as valuable as the data that goes in it, making user adoption a top consideration in any CRM initiative. But if user adoption is only considered after system selection, it may be too late. The specific requirements of each of a CRM system's diverse user groups must be considered from the outset and used to guide the selection of a CRM system that will best satisfy user needs.

Among all CRM user groups, the sales organization is often the most important—and challenging—to win over. So how can a company ensure selection of a CRM system that will be embraced by sales users? This white paper provides core principles companies can use to help them select a CRM system that each sales user feels was built just for them.

Why Sales Needs CRM that's Built for Them

Perhaps the most important business trend facing companies today is the shift from product-centricity to customer-centricity. Recognizing that loyal, satisfied customers are the true drivers of business success, companies of all sizes across diverse industries are realigning their operations and transforming their work cultures to place customers' needs and preferences at the center of their business.

Making a business more customer-centric is a multi-pronged effort that requires transformations of process, culture, and strategy from the top levels of the company down to every individual employee. In this high-tech age, technology plays a central role in providing the infrastructure and tools to support the transition to customer-centricity. While a customer-centric vision and strategy must always precede the technology, technology tools are critical in implementing this vision and building it into daily processes. As broad-reaching systems that touch countless customer-facing processes, customer relationship management (CRM) systems are typically central to companies' efforts to reinvent the customer experience and embrace customer-centricity.

> AMR Research cites sales-user reluctance as one of the top explanations for CRM failures.

As a consequence, many companies are currently taking a serious look at their customer relationship management strategies and supporting systems. Companies that have gone without a CRM system until now are recognizing that such a solution may be necessary to take them to the next level and align their firm around the customer effectively. And even those firms that have used CRM systems for years are reexamining their strategies and looking at ways they can use their system more effectively or upgrade to a more current, flexible, or suitable system.[1]

The Sales Factor

As companies take a fresh look at CRM tools and strategies, the sales department often has a strong voice in the process—and understandably so. While the best CRM implementations are by nature multi-departmental, touching every facet of the customer experience, the need for sales force automation (SFA) is often one of the primary drivers for a CRM initiative and measures of its success. With the most direct impact on revenues, the sales department is often where companies are looking to find the most compelling ROI metrics from their CRM implementation.

Yet salespeople are notorious for their reluctance to embrace new systems, especially CRM solutions—so much so that AMR Research cites sales-user reluctance as one of the top explanations for CRM failures.[2] Salespeople typically have their own tried-and-true approaches to managing their sales cycles and see little reason to change the way they are doing things, especially if their sales performance is meeting company expectations. CRM initiatives are often viewed by salespeople as a means of management control or oversight, rather than an effort to facilitate the sales process and help sales users be more successful. Winning over the sales team is consequently one of the most challenging and crucial issues in CRM implementation—and a factor that can make or break a CRM initiative.

For this reason, companies evaluating CRM systems need to carefully research and consider a system's suitability for their sales force, ensuring that the CRM project is a true sales initiative, not just an IT project. While this certainly need not entail the exclusion or de-emphasis of the needs of other customer-facing departments, such as marketing and customer service, a CRM system that satisfies a broad but shallow range of requirements across departments may be less successful than one that thoroughly satisfies the needs of a single department, and with the particular difficulties associated with sales adoption, sales-team needs demand special consideration.

So what does the sales department want from a CRM system? First, from the sales executives down through each role on the sales team—inside sales, field sales, sales administrators, and all others—every user needs to see immediate value from using the system. If CRM usage is to be seen as desirable and beneficial, rather than a cumbersome extra administrative layer, each user needs an immediate and compelling answer to the natural question, "What's in it for me?" They need to see a system that sufficiently mirrors their current processes to be comfortable and familiar, rather than arbitrarily forcing change. And where the system does deviate from their current processes, there has to be a clear advantage to doing so. The sales force needs to see a solution that's not just there for their managers' benefit, but for their own. On the flip side, sales managers need to see a solution that's not just a tactical end-user tool but a provider of strategic management insight; it needs to be something they're not just compelling salespeople to use, but desire to use themselves. In other words, each member of the sales team needs to see the CRM solution as a system that's *built for them*.

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1. The CRM market continues to expand, with AMR Research estimating that it will grow from 14 billion in 2007 to 22 billion by 2012. See Lager, Marshall, "Growth Trend Continues for CRM," DestinationCRM.com, July 1, 2008.
2. Bois, Robert. "Sales Force Automation, Part 1: May I Have a Little Bit More Carrot?" AMR Research, June 8, 2006.

What Is "CRM Built for Me"?

The desire to deliver a superior customer experience is a primary driver of customer-centricity, but when it comes to the day-to-day realities of a company's employees, their *own* experiences naturally factor in. For a company to succeed in becoming more customer-centric, it needs to give its employees the tools to deliver a better customer experience, but it's no secret that these tools will be embraced far more enthusiastically if they also make life easier for users. Within the sales department, providing a clear benefit from CRM usage—not just to the customer or the company as a whole, but to the individual user—is the surest way to ensure CRM success.

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For your users to feel that a CRM solution is "built for them," it needs to address tangible pain-points in their daily activities, rather than introduce new ones. These pain-points differ by role. Let's take a closer look.

Sales Force: Help Me Sell

What do salespeople want? Bottom line: to sell more.

The sales process begins with sales leads. Almost every salesperson feels they would benefit from more leads. But they don't just want more leads; they want higher-quality leads as well. A healthy stream of strong sales leads keeps salespeople focused on opportunities with real revenue potential rather than wasting time chasing weak leads.

Even more than leads, however, salespeople want the chance to sell. And they have far less time to do so than you might think. Studies have indicated that salespeople on average spend only 10% of their time actively selling, spending an alarming 31% of their time on administration and a further 14% on problem-solving.[3] This means that reducing the amount of admin time and problem-solving a salesperson has to do can have a dramatic effect on sales, easily tripling or quadrupling the time a salesperson spends doing what they do best—selling. Increasing selling time is thus a goal shared by sales end-users and management, where any inroads make both sides happy.

The Solution? Sales-Centric CRM

For a CRM system to be an effective tool for the sales force, there has to be a clear and direct line between usage and sales success. The CRM system must improve the lead flow going to the sales force, facilitate the deal cycle, and help push deals toward closure. Above all, the CRM system must eliminate or streamline administrative overhead, not add to it.

First, take the issue of sales leads. Is a salesperson's wish for higher-volume and better-quality leads unrealistic? Not if the CRM system offers effective marketing tools. With strong marketing automation and lead management features, a CRM system can be used to generate targeted leads and effectively qualify, rank, and sort them before they reach the sales force, cutting down on wasted time spent on dead-end or incorrectly assigned leads. The automation of lead generation and management can also accelerate the entire lead collection and distribution process, ensuring salespeople get leads while they're still hot and thus improving sales potential.

Increased and improved lead flow from marketing will make salespeople sit up and take notice of a CRM system. But will it make them use it themselves? Not necessarily, unless it helps them manage these opportunities more easily and with better results—and without making them give up the tools and methods with which they're already comfortable.

For example, the CRM system must work well with the tools the salesperson already uses, including programs such as Microsoft® Office and Outlook,® and devices such as the BlackBerry.® Deep integration is best here. If the salesperson is forced to take extra steps or switch back and forth between applications or devices to add communications and data to the CRM system or pull data from it, odds are that they'll stick to the tools they're accustomed to using and the CRM system will be ignored. However, if a CRM system is effectively integrated with their favorite tools and makes it easy to move seamlessly between programs and systems, accessing and adding information a single time in a single location, the salesperson will quickly see the benefits and time-savings and embrace the new solution.

Similarly, if managing a sales opportunity in the CRM system is extra effort, it's unlikely that salespeople will bother. But if it truly helps them manage opportunities more effectively, collaborate with team members centrally, and keep management up to date without added effort, it will save them countless time-consuming calls, meetings, e-mails, and reports. But it still needs to do so in a manner that matches the way they work—salespeople understandably revolt against changing their proven processes just to fit an application's workflow.

To win over salespeople, a CRM system must truly show the value of each piece of information the user puts in, saving them extra effort in communicating the data and making it easy for them and others to quickly find, report on, and apply. It must also save them time—if a CRM system effectively accelerates cumbersome parts of sales cycle, such as quote and contract generation and obtaining management approvals, salespeople won't need much convincing to start using it consistently.

If it has strong sales-oriented tools, a CRM system will sell itself to the sales force, making their lives easier and becoming an indispensable tool they'll wonder how they ever lived without.

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3. Proudfoot Consulting. "Sales Reps spend only 10% of their time selling." 2004.

Sales Management: Give Me Insight

Sales managers have often moved up through the sales ranks themselves, and they don't need to be told how important good information and relationship management tools are to a salesperson's success. But their own high-pressure roles require them to have a constant, thorough understanding of what's going on across their area of responsibility, monitor a large number of moving parts, step in to correct or facilitate as needed, make decisions under pressure, and report results and status to executive management. Just as much as their sales force, sales managers need strong tools to help them manage their time and access the information they need to generate sales success. But their focus and needs are different than the sales force's, and just as much as their teams, they need to feel a CRM system is built with them in mind.

> A CRM system should provide sales management with insight—into the sales pipeline, into their sales team's performance, and into the factors affecting sales outcomes and what they can do to improve them.

To be effective, sales managers need to understand at all times what's happening with their sales force. But achieving this clear picture can be difficult, especially with complex sales cycles and dispersed sales teams. For time-strapped sales managers, clear and easy visibility into the sales pipeline is of paramount importance, and they want it to be pain-free. Chasing down salespeople for updates is time-consuming and inefficient, and it simply contributes to the administrative time-drain on salespeople. Sales managers need to know where each deal stands at all times, but without placing extra administrative burdens on the sales force.

Sales managers also need to manage the sales process, stepping in to facilitate deal progress and resolve issues. But they don't need to micromanage. What they need most is the ability to see when and where their intervention is required so they can spend their time as productively and helpfully as possible. They also need the ability to actively improve sales outcomes by ensuring their salespeople are following best practices and proven sales steps to drive deals reliably toward closure.

In addition, sales managers need to be able to provide sales forecasts with confidence and precision. Basing forecasts on salespeople's subjective evaluations of where deals stand is far too imprecise; managers need a more objective and consistent method for measuring and predicting sales outcomes.

The Solution? CRM Built for Sales Managers, Too

A CRM system that's truly "built for sales" will help sales managers conquer all of these challenges. When a company manages leads, opportunities, deals, and customers within the CRM system, the sales manager gains full visibility into the sales cycle, ensuring a healthy pipeline not just for the immediate fiscal quarter, but for future quarters as well. Sales managers need customized CRM dashboards built with their needs in mind, designed to show them exactly what deals are in the pipeline and where each one stands.

A good CRM system will also enable sales management to implement a proven sales methodology with defined steps and model it within the system to ensure it is consistently followed by all sales reps without the need for micromanagement. Having these defined sales milestones also enables more accurate and objective forecasting, giving a solid sense of deal status and probability to close.

A CRM system should also enable clear identification of deals that are at risk or nearing a stage requiring management intervention, enabling sales managers to become proactive. Strong reporting tools should allow the manager to report on diverse sales metrics and monitor sales performance. Tracking of all sales activity within the system also allows for more management insight into the reasons behind wins and losses, providing valuable information that can be used to strengthen future sales processes. When adjustments are needed, good territory management tools should enable the manager to realign territories according to any desired criteria, even using sophisticated multi-variant models.

Above all, a CRM system should provide sales management with insight—into the sales pipeline, into their sales team's performance, and into the factors affecting sales outcomes and what they can do to improve them. If a CRM system is built with sales manager needs in mind, this insight will be built right in, and sales managers will come to see the CRM system as their window into the sales force.

Core Principles for Sales-Focused CRM

We have examined some of the features a CRM system needs to have to meet the needs of the sales department. But finding the right CRM system for your sales team is not about having a checklist of features; it's about understanding the fundamental attributes that make a system more useful for sales.

The keys to selecting CRM that will work for your sales force can be boiled down into a few core principles. Keeping these in mind when evaluating a CRM system can help a company select a more successful solution.

> With a dashboard that shows the information and tools of their choice, a CRM system can easily become a sales user's one-stop-shop for all daily information and activity.

Need to Know What Sales Wants? Ask Them!

Obvious as it seems, a lot of CRM projects fail to adequately investigate the needs of sales users before embarking on a CRM selection process. Far too often, a list of "standard SFA features" or a set of presumptions about sales needs is used to guide evaluation criteria. To select a CRM system that truly meets sales needs, a company needs to listen to its sales users. It needs to understand how they're spending their time and how a CRM system could help them spend that time more effectively.

Ideally, a CRM selection committee should have solid representation from the sales department, and a focus group made up of a variety of sales users—managers, administrators, inside sales, and field sales—should have a say in the criteria used to evaluate the system. This will not only help ensure the right system is selected, but also obtain early buy-in and understanding from different parts of the sales force. These individuals can later become the key influencers who evangelize the new system to their peers, avoiding the sentiment that a CRM system is being "imposed" upon the sales force by IT or management.

Beyond helping the company make a better CRM selection and obtain user buy-in, involving the sales team in the evaluation process may actually save the company money. By talking to sales users about what's most important and helpful to them, the company may learn that certain cutting-edge SFA features, or even fairly standard ones, are not as important or applicable to their sales users as they might have thought. This can help the company avoid paying for bells and whistles it doesn't need.

Sales Is Not a Cookie-Cutter Process—Your CRM Shouldn't Be Either

No two companies are alike. A company's sales process depends on its methodology, the kinds of products or services it sells, the length and complexity of the sales cycle, and the company culture—just to name a few among myriad factors. For many companies, their sales process is a differentiator and a competitive advantage. For companies looking to become more customer-driven, this is especially true: the sales process is a critical part of the customer experience, the one that makes the prospect decide whether to become a customer in the first place. It must be methodical, consistent, and a reflection of the superior customer experience the company desires to project.

Accordingly, a CRM system has to be a solution that enhances, facilitates, and embeds the company's sales process, rather than dictating it. It needs to have the flexibility to cost-effectively model your company's unique practices and workflows to solidify, rather than neutralize, your company's competitive advantages.

Each Sales User Is an Individual—Let Them Be

In the same way that no two companies are alike, no two sales users are alike. While CRM can help a company ensure thoroughness and implement a consistent methodology, there's no need to force users to give up their individuality. Different tools, information, and workflows apply to different user groups within the sales department. Selecting a system that allows for different role-based views of the system enables the user to navigate straight to the tools and information that are most relevant to their role, saving them time and making the system more usable. Even more than that, giving individual users the ability to personalize their dashboard, create their own saved searches and favorite links, and integrate external data sources into the system enables users to truly make the system their own. With a dashboard that shows the information and tools of their choice—their deals, their contacts, their calendar items, their to-do list, even their preferred external news sources—a CRM system can easily become a sales user's one-stop-shop for all daily information and activity. Strong personalization capabilities help create a CRM system that each user can genuinely feel is "built for them."

Your Sales Users Are On the Move—CRM Must Move with Them

The days of business being anchored to the office are long over. Today's sales professionals are constantly on the move, and they need to be able to do business whenever and wherever the occasion arises, be it at a client's place of business, on a tradeshow floor, in a restaurant, or on a plane. "Let me get back to you once I get back to the office" won't cut it in today's fast-paced business environment; delays kill deals. Your sales users need to be able to access, update, add, and apply prospect, opportunity, and customer data while on the go—where and when this data is fresh and relevant and keeps deals moving forward. But there are many different kinds of mobile CRM, from web access and wireless access to disconnected access and handheld-device-resident CRM, each of which offers different pros and cons to sales users and to the company in terms of flexibility, cost, utility, and security. Finding the right mobile solution or combination of solutions for your sales force is critical to user adoption and CRM success. As with other CRM features, in-depth sales consultation is essential: take the time to understand exactly how and where your sales users are likely to use mobile CRM and what kind of data and access they'll need, rather than assuming that a certain kind of mobile solution will work best. This will ultimately ensure you implement a system positioned for maximum user uptake at the optimal cost.

Business Doesn't Stand Still—CRM Shouldn't Hold You Back

Today's accelerated business pace ensures that one old adage remains truer than ever: the only constant is change. Markets, competitors, technologies, and customer demands are continually evolving, forcing companies to grapple with new business conditions and pressures at an unprecedented frequency. Just as a company's unique processes give it its competitive edge, the speed and efficiency with which it adapts those processes to changing business factors help it maintain and enhance that advantage.

This is exactly where companies' increased reliance on technology can either help or hinder them. Even if a CRM system has been flawlessly customized to model your sales processes and meet the needs of your sales users, how long will it be before these processes and needs change? If the CRM system's underlying technology is rigid and inflexible, making changes will be prohibitively time-consuming and costly, forcing companies to think twice about any change and slowing them down if they do choose to pursue it. For this reason, system flexibility and ease of customization should hold considerable weight in CRM selection. No matter how well the sales team is consulted in requirements-gathering and involved in selection, the fact remains that a company can never fully predict how needs and conditions will evolve over coming months and years—but they can safely assume that they will.

By choosing a CRM solution that is highly flexible and easy to customize and change, an organization not only contributes substantially to its overall business agility and competitiveness, but to its ability to be responsive to ongoing sales input.

By choosing a CRM solution that is highly flexible and easy to customize and change, an organization not only contributes substantially to its overall business agility and competitiveness, but to its ability to be responsive to ongoing sales input. In fact, it is extremely common for successful CRM implementations to generate a wealth of sales feedback about how the system could be made even better and more helpful to them. And as the organization manages sales through the system, it gains more and more valuable information and insight into the factors and approaches that contribute to sales success. As valuable as this insight may be, it is nothing without the ability to respond by implementing enhancements and refinements to sales processes and data.

Finally, any company looking to shift to a more customer-centric business model must bear in mind what this transition implies: not just that they are going to gather more information about customer needs and preferences, but that they are going to react to it. The value of customer-centricity is the ability to get closer to customers and keep a finger on the pulse of their changing needs, aligning the organization to more successfully satisfy them. Becoming more responsive and customer-focused demands not just the cultural, but also the *technological* infrastructure to follow through on adapting to evolving customer expectations.

Pivotal CRM: CRM That's Built for You

Pivotal CRM is the solution of choice for companies seeking customer relationship management software that can fully and cost-effectively satisfy their users' expectations. Built with the user experience in mind, Pivotal CRM offers unparalleled flexibility and customizability, enabling companies to tailor the system precisely to their sales users' needs.

With a clean, Microsoft-style interface, Pivotal CRM is a familiar and comfortable system for sales users accustomed to using other popular Microsoft products, reducing the learning curve and increasing the speed of user adoption. A personalizable dashboard allows the user to create a "home base" that is truly a personal hub, integrating pre-built, custom, or third-party SharePoint® Web Parts to combine their favorite data feeds and applications with personal shortcuts and information such as top contacts, deals in progress, to-do lists, and the Outlook calendar. This dashboard becomes sales users' hub for information and daily activity management.

Pivotal CRM's role- and task-based navigation enables sales users to beeline immediately to the tools that are most relevant to them, bypassing those they don't use and simplifying their experience. Different role-based pages can be developed for any position, enabling the company to create not just a "Sales" area, but an "Inside

Sales" area, a "Field Sales" area, a "Sales Manager" area, a "Sales Operations" area, and so on, further tailoring and streamlining the user experience. Each area can have custom lists of role-specific links, tools, and reports for quick access, saving users time finding the information and tools they need most. Unused areas can be hidden to further simplify the interface, and custom rule-based security ensures users only see the information and tools they're allowed to access—for example, deal poaching can be prevented by only allowing sales users to access their own deal information.

> Pivotal CRM is seamlessly integrated with the programs that form the backbone of sales users' daily activities: Microsoft Outlook, SharePoint, and the Office suite.

Built on the Microsoft .NET Framework, Pivotal CRM is seamlessly integrated with the programs that form the backbone of sales users' daily activities: Microsoft Outlook, SharePoint, and the Office suite. The applications are so closely integrated with Pivotal CRM that they function as though embedded within the system, meaning that sales users don't need to switch back and forth between applications; they need never leave the CRM system to create e-mails, schedule meetings, create documents and spreadsheets, and more, making the CRM system their number-one resource and tool. Similarly, information in Pivotal CRM can be seamlessly looked up and used within Microsoft Office, Outlook, and SharePoint, so it need only be entered once to be used across multiple applications. This makes mail merges, for example, a breeze for sales users to perform. Similarly, quotes and contracts can be generated in a flash, pulling all required data from the opportunity record rather than requiring sales users to look it up and re-enter it.

Pivotal CRM's powerful querying capabilities make it easy for users to find the information they need—quickly. Queries can reference multiple tables in a single search, making complex searches simple. For example, users can easily call up lists of customers in a specific region who have bought a certain product to generate a target list for cross-selling—and then perform a mail-merge to instantly generate sales e-mails, letters, or faxes to the list, within seconds! All search results can be exported into Excel in a click, making it easy to work with data and create charts and graphs.

Pivotal CRM makes it easy for sales managers to track their sales pipelines and generate reliable forecasts, customizing reports to include or exclude deals as appropriate. They can also log into the system at any time to see the status of sales deals and review any updates. Using the system, they can approve or reject quotes and contracts instantly, driving deals forward.

Sales managers can also use Pivotal CRM to precisely model their sales methodology, creating custom workflows and sales milestones that must be met before moving on to the next stage of the sales cycle—and pipeline. They can also maintain multi-currency price-lists within the system for easy access and international usage and automatically assign accounts based on virtually any criteria, making complex territory management simple.

Pivotal CRM supports the mobile CRM needs of diverse organizations with a full range of mobile CRM options, including online access, disconnected access via a laptop, wireless access, and a device-resident version of Pivotal CRM for handheld devices such as the BlackBerry.

Because it leverages and integrates the Microsoft technologies most companies already have, Pivotal CRM extends companies' previous technology investments and provides a lower cost of ownership, in addition to drawing on technology skills already held by many IT teams. The flexibility of the Pivotal CRM platform makes the system faster and easier to integrate and customize than almost any other available CRM system. Beyond that, when companies choose Pivotal CRM, they get the power of the Pivotal CRM platform, a highly flexible and usable application development platform that enables IT users to build out integrated custom applications that extend well beyond the traditional boundaries of CRM—once they discover the flexibility and ease of development on this platform, it's common for Pivotal CRM customers to build out multiple additional applications on the platform, realizing staggering savings by dramatically reducing the cost and complexity of custom development. Even if they don't choose to take advantage of this potential, this same platform and flexibility empowers companies using Pivotal CRM to quickly and easily customize and adapt the system to respond to changing business needs at a low cost.

Conclusion: The Secret to Sales Success

The sales organization plays arguably the most important role in a company's CRM usage, and thus deserves special consideration in CRM selection. And because salespeople are traditionally resistant to new systems and methodologies, factors that can have an impact on sales user adoption should always be front of mind in the selection process.

To ensure that the sales department will embrace a CRM system, a company must take the time to understand how a CRM system can best serve the needs of the various roles within the sales department. By paying special attention to selecting a CRM system that offers strong sales tools, a user-friendly interface, and the flexibility to model the company's unique processes and users' individual preferences, a company can confidently deliver a CRM solution that every sales user feels is built just for them.

The “CRM Built for Me” Series

The “CRM Built for Me” Series addresses the critical importance of customization, configuration, and personalization to the success of any company’s customer relationship management strategy. CRM is first and foremost about creating a customer-centric organization, but the best CRM projects deliver both customer satisfaction and employee enablement. CRM needs and usage vary across departments, but to deliver full value and a truly holistic client view, users across sales, marketing, and customer service—as well as the back-end IT team implementing and maintaining the system—must all be equally well-served by the CRM solution. The white papers, demos, and other components of the “CRM Built for Me” Series reveal why flexible CRM that is tailored to the needs of the company, the department, and the individual user deliver superior results.

Experience CRM That’s Built for You

To learn more about how Pivotal CRM can meet your sales organization’s unique needs, call us at +1-877-PIVOTAL or visit us at www.PivotalCRM.com.