Chapter 14

# Sales-force automation

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# Chapter objectives

**By the end of this chapter you will understand:**

1. **what is meant by sales-force automation (SFA)**
2. **the members of the SFA ecosystem**
3. **the benefits derived from SFA**
4. **the functionality that is available in SFA software applications**
5. **what needs to be done to encourage salespeople to adopt SFA.**

# Introduction

This is the first of three chapters that look at CRM technologies. This chapter is about technologies used by salespeople and their managers. Subsequent chapters review marketing automation and service automation.

Sales-force automation (SFA) has offered technological support to sales people and managers since the beginning of the 1990s. SFA is now so widely adopted in business-to-business environments that it is seen as a 'competitive imperative'[1] that offers 'competitive parity'.[2] In other words, SFA is just a regular feature of the selling landscape.

Salespeople are found in a wide variety of contexts: in the field calling on business and institutional customers, in offices, contact centres and call centres receiving incoming orders and making outbound sales calls, in retail business-to-customer settings, in the street selling door-to-door, and even in the home where party planners sell a variety of merchandise ranging from adult sex aids to cleaning products. All these sales contexts deploy SFA in some form or other.

The SFA ecosystem is made up of three components: SFA solutions providers, hardware and infrastructure vendors, and associated service providers. The technology enables companies to collect, store, analyse, distribute and use customer-related data for sales purposes. Customer-related data like this is the key to customer orientation[3] and the development of long-term mutually beneficial relationships with customers.[4] SFA software from solutions providers enables sales representatives and their managers to manage sales pipelines, track contacts and configure products, among many other things. SFA software also provides reports for sales representatives and managers. This chapter starts by defining the field and identifying members of the SFA ecosystem.

# What is SFA?

The term sales-force automation (SFA) can be defined as:

> Sales-force automation is the application of computerized technologies to support salespeople and sales management in the achievement of their work-related objectives.

Hardware and software are the key technological elements of SFA. Hardware includes desktop, laptop and handheld devices and contact or call centre telephony technology. Software comprises both 'point' solutions that are designed to assist in a single area of selling or sales management, and integrated solutions that offer a range of functionality. The integrated packages can be dedicated to sales-force applications only, or can be incorporated into comprehensive CRM suites that operate over the three front-office areas of marketing, service and sales.

All SFA software is designed so that pertinent customer-related data can be captured, stored, analysed and distributed to sales people and sales managers in order for them to become more effective or efficient in the pursuit of their objectives.

# The SFA ecosystem

The SFA ecosystem consists of SFA solutions providers, hardware and infrastructure vendors, and service providers.

## SFA solutions providers

SFA solutions providers can be classified in a number of ways. Some are SFA specialists. They compete against enterprise and mid-market CRM suites that include SFA modules, and enterprise suite vendors that offer a full range of IT solutions to support business, including supply chain management (SCM), enterprise resource planning (ERP) and customer relationship management (CRM). A number of illustrative examples are listed in Table 14.1.

| SFA specialists | SFA as part of CRM suite | SFA as part of Enterprise suite |
|---|---|---|
| Selectica | Onyx | Oracle (including PeopleSoft and Siebel suites) |
| EzRoute | Pivotal | SAP |
| Salesnet | Salesforce.com | Epicor |
| CallWizard | SalesLogix | Deltek |
| Selltech | ACCPAC | Fourth Shift |
| CyberForms | NetCRM | Intentia |

**Table 14.1**
Classification of SFA vendors

Some SFA specialists focus on particular areas of functionality within SFA. Selectica, for example, builds customized configurators. A configurator is a software-based application engine that allows companies to configure complex products and services based on predefined rules. Sometimes, customers interact directly with configurators. For example, the Dell Computer website allows customers to build their own personal computers (PCs). Configurators guide users through the buying and specification process, offering only valid options and features at each step. This can deliver benefits to customers, salespeople and management. Customers can define and build their preferred customized solutions, reducing cost and meeting specifications. Salespeople no longer need to master comprehensive product or service technical data, because these are built into the engine. Training costs for salespeople are therefore reduced. The potential for incorrectly specifying a solution for a customer is decreased. Configurators enable mass customization (see Case 14.1).

## Case 14.1

### Product configuration at General Motors

Lou Adler is responsible for helping car dealers configure, order and price cars. For more than 15 years he lugged three binders between dealerships. One binder listed current models. Another listed available options. The third listed price information. It took Adler 20 minutes to configure each vehicle. Some dealerships asked him to configure 300 vehicles per sales call. It took a long time, and ultimately about 25 per cent of orders were rejected by the factory as impossible to build. Today, Adler takes two minutes to configure, price and order each car. He uses a product configurator called GM PROSPEC which has virtually eliminated factory rejection.

Many of the vendors offering SFA as part of broader CRM suites started out as SFA specialists, for example Siebel and salesforce.com. These brands now offer a wide range of marketing, service and sales automation.

## Hardware and infrastructure vendors

The performance requirements of SFA applications can create significant challenges for both hardware and technology infrastructure. Whereas office-bound salespeople and sales managers might be happy to use desktop or laptop computers, field sales representatives often want lighter, handheld devices, such as Microsoft-based Windows Pocket PC, Palm Pilot or Blackberry. Where companies have geographically dispersed external salespeople, SFA systems must be able to operate out of the office and over the web. Mobile or wireless solutions are necessary, as the data held on portable devices must be regularly synchronized with the central database. SFA applications often need to integrate with a number of communication channels which use different technologies (e.g. web, e-mail or telephone). In growing industries and companies, SFA applications must be supported by hardware and infrastructure that can sustain increased numbers of users.

### Services

The services component of the SFA ecosystem is very diverse. When a sales-force automation project is undertaken, service costs may significantly add to overall project expenditure. SFA project leaders might buy services from providers that re-engineer selling processes, manage projects, train salespeople, consult on organizational structure or conduct customer portfolio analysis. Service providers can contribute significantly both to SFA project costs and to the probability of success.

The hardware and software for a sales-force automation project may account for between 10 and 50 per cent of the overall costs. The balance is made up of service costs. Although some software vendor case studies suggest that payback is achievable within days, many projects take between 12 and 24 months to implement, let alone to yield a return. It has been suggested that the average implementation period is 21 months[5] and that users need over 100 hours experience with the systems before they could claim to have mastered it.[6]

## SFA software functionality

SFA applications offer a range of functionality, as listed in Table 14.2. Not all solutions provide the full complement of sales-related functionality. In the next few paragraphs, we'll describe this functionality in more detail.

| | |
|---|---|
| account management | pipeline management |
| activity management | product encyclopaedias |
| contact management | product configuration |
| contract management | product visualization |
| document management | proposal generation |
| event management | quotation management |
| incentive management | sales forecasting |
| lead management | territory management |
| opportunity management | workflow engineering |
| order management | |

**Table 14.2** Functionality offered by SFA software

## Account management

Account management offers sales representatives and managers a complete view of the customer relationship including contacts, contact history, completed transactions, current orders, shipments, enquiries, service history, opportunities and quotations. This allows sales representatives and account managers to keep track of all their obligations in respect of every account for which they are responsible, whether this is an opportunity to be closed, an order or a service enquiry. Figure 14.1 is an account management screenshot from CRM vendor salesforce.com. You will see that it shows account details, contacts, opportunities, activities and service cases that are unresolved.

## Activity management

Activity management keeps sales representatives and managers aware of all activities, whether complete or pending, related to an account, contact or opportunity, by establishing to-do lists, setting priorities, monitoring progress and programming alerts. Activities include, for example, preparation of quotations, scheduling of sales calls and following up enquiries.

## Contact management

Contact management functionality includes tools for building, sharing and updating contact lists, making appointments, time setting, and task, event and contact tracking. Contact list data includes names, phone numbers, addresses, preference data and e-mail addresses for people and companies, as well as a history of inbound and outbound communications. Figure 14.2 is an illustration of a contact management page from a CRM vendor.

## Contract management

Contract management functionality enables representatives and managers to create, track, progress, accelerate, monitor and control contracts with customers. Contract management helps manage a contract's lifespan by shortening approval cycles for contracts, renewing contracts sooner and reducing administrative costs. The software may use security controls to ensure only approved people have access to contracts.

## Document management

Companies generate and use many documents as they sell to customers, for example brochures, product specifications, price lists, competitive comparisons and templates for preparing quotations. Document management software allows companies to manage these documents, keep them current and ensure that they are available to representatives and managers when needed. Some systems allow all documents to be 'attached' to the account or contact, thus facilitating faster and fuller recall of past interactions.

## Event management software

This software enables representatives and managers to plan, implement, control and evaluate events such as conferences, seminars, trade shows,

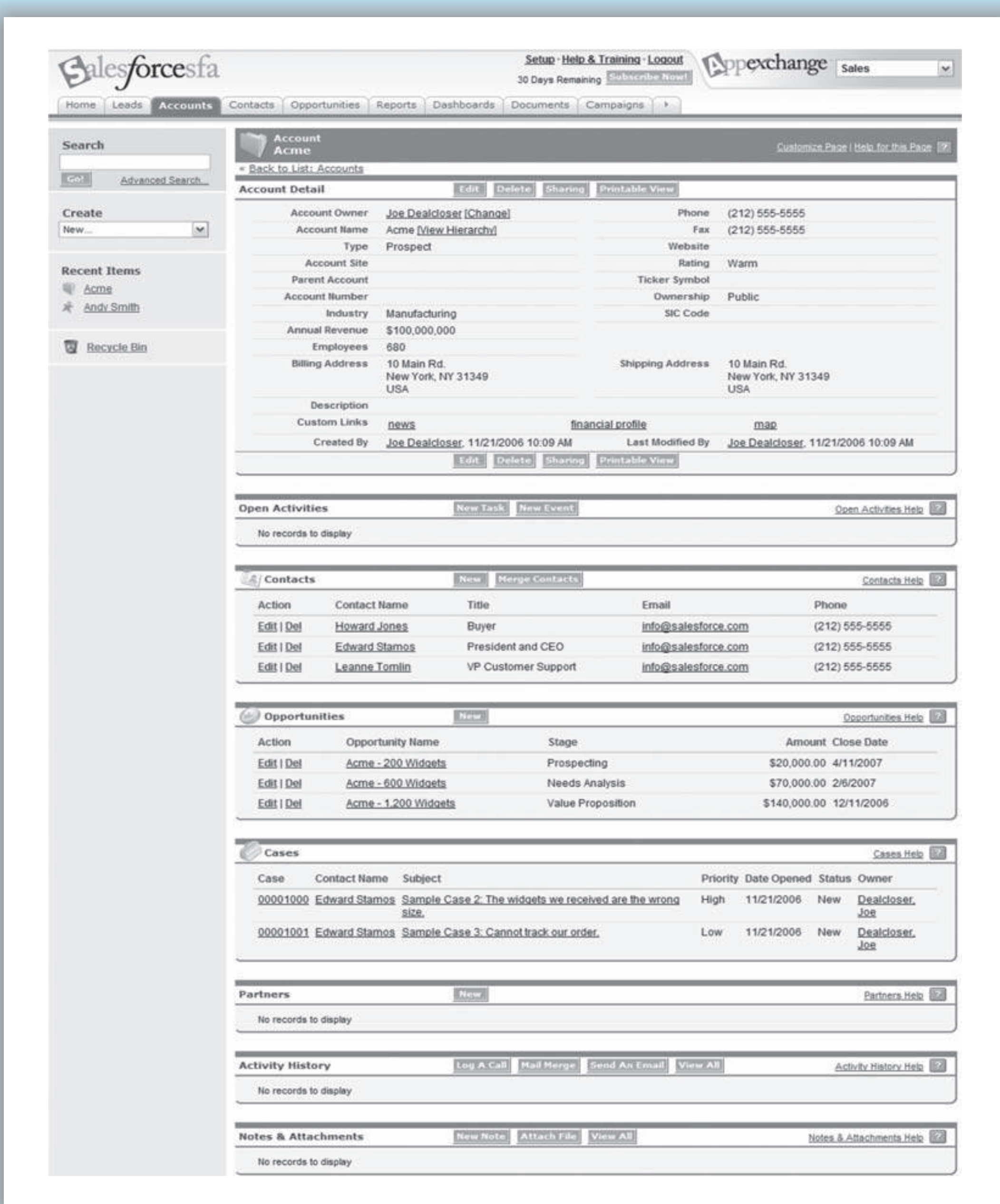


**Figure 14.1** Account management screenshot[7]

exhibitions and webinars, whether run solo or jointly with customers or other partners. Some events, such as conferences, can be very complex and involve many stakeholders, such as sponsors, exhibitors, security partners, police, accommodation partners, travel partners, catering

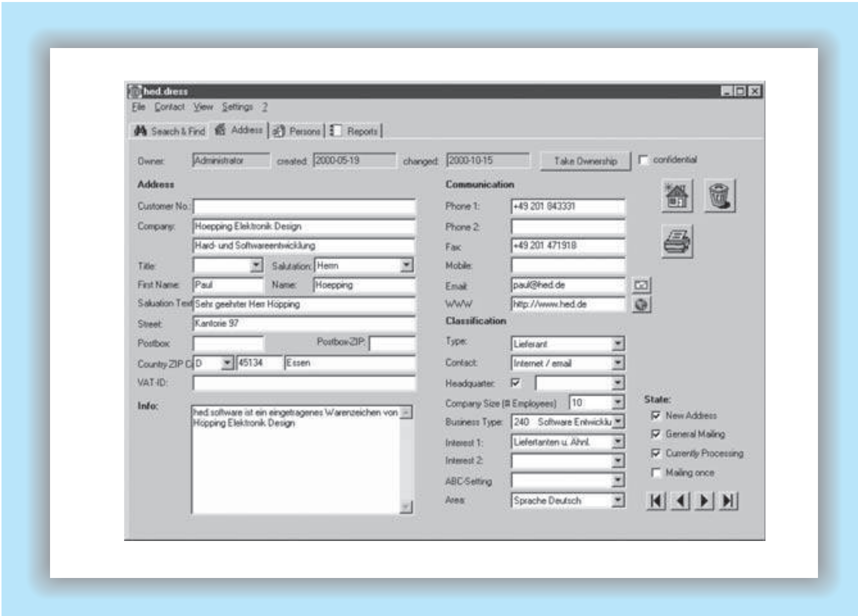


**Figure 14.2**
Contact management screenshot

partners, lighting and sound contractors, speakers, invitees and the general public. Indeed, some major events are planned many years in advance; you only need to consider the Olympics or FIFA World Cup to appreciate the grand scale of some major events. Few, if any, sales-related events reach a comparable level of complexity, but events to which customers and key partners are invited must run smoothly or the company risks being regarded as unprofessional.

Event management software contains a range of tools that can be useful to sales managers and others organizing events. These include an event calendar, online registration, partner management tools, event reports and analytics, attendee communication and management tools, badge creation, activity lists for exhibitors and venue management tools. Figure 14.3 is an illustrative event management screenshot from PCGuild.

## Incentive management

Incentive management is an issue for sales managers who use commissions to lift, direct and reward sales representatives' efforts. In many companies, commissions are calculated using standalone spreadsheets. When part of a sales-force automation solution, incentive management eliminates the need to re-enter or transfer data from spreadsheets, leading to better visibility, accuracy and higher efficiency. Incentive management applications can be linked into back-office payroll applications that automate payment.

## Lead management

Lead management allows companies to create, assign and track sales leads. Leads either expire or convert into qualified opportunities. User-defined rules allow leads to be allocated to representatives and account managers on the basis of role, territory, product expertise or

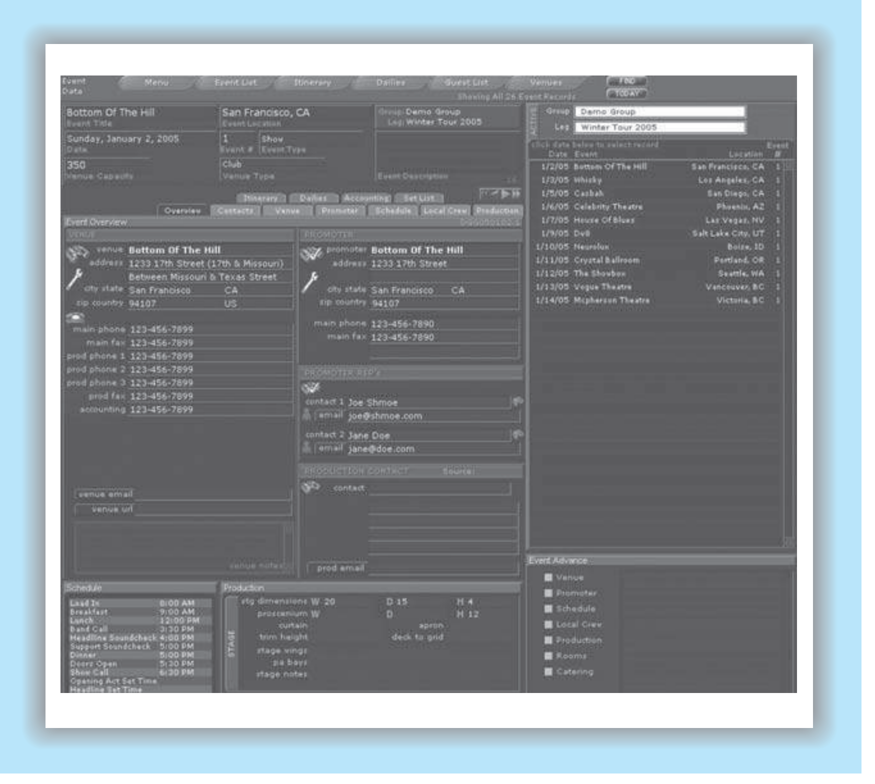


**Figure 14.3** Event management screenshot[8]

other variables. Lead management allows for more equitable workload distribution across a sales team, and uses security controls to ensure that representatives can only access their own leads.

## Opportunity management

An opportunity is a record of a potential sale or any other type of revenue generation. Opportunity management software enables representatives and managers to create an opportunity record in the database and monitor progress against a predefined selling methodology. Salespeople follow the steps as if following a checklist, ensuring that all opportunities are handled consistently. Sales representatives can view their own opportunities linked to additional information such as contacts, activities, products, proposals, projects, presentations, quotations, competitors, estimated revenue, cost of sales, probability of closure, sales stage and so on. Opportunity management functionality allows representatives to estimate their future bonuses or commissions. Managers can then receive reports on the progress of opportunities as they move towards closure, broken down by salesperson, territory, type, date or other criteria. Figure 14.5 shows an opportunity management report. Note the selling model in the window on the left, at the bottom of the screen, and the probability of closing the opportunity at the top of the screen.

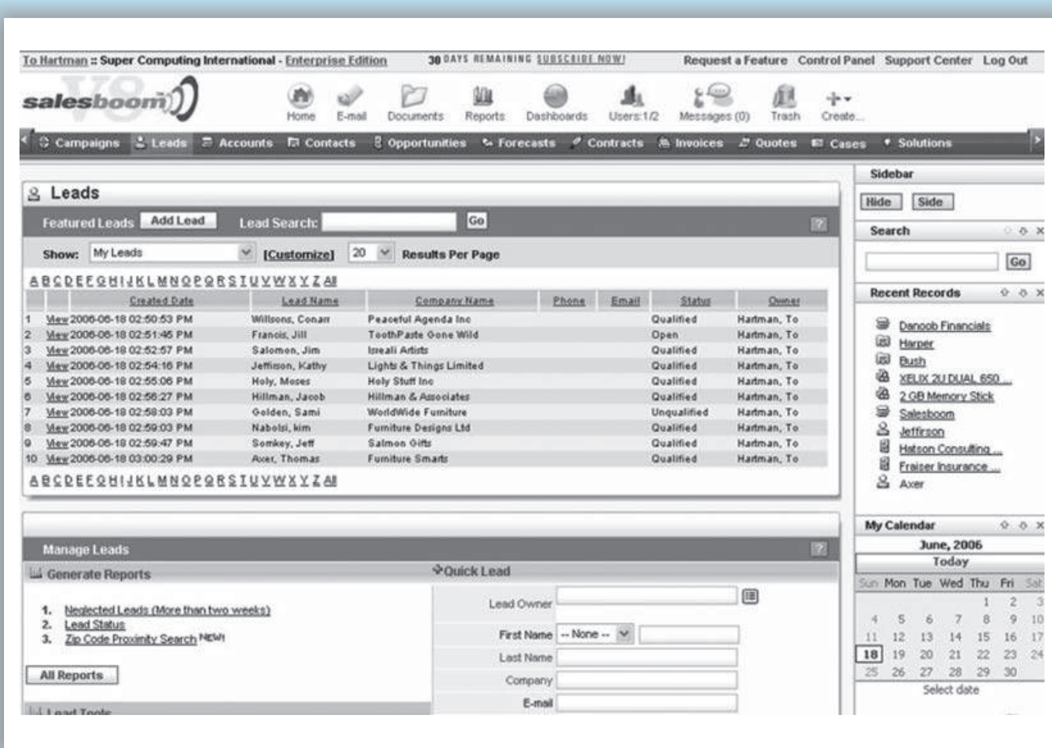


**Figure 14.4**
Lead management screenshot[9]

## Order management

Order management functionality allows representatives to convert quotations and estimates into correctly priced orders once a customer has agreed to buy. If this is done in front of a customer, the order can be loaded into production or picked from a warehouse more quickly. Order management software may include a quotation engine, a pricing module and a product configurator. With visibility through a portal, the customer, representative and manager have access to the same, up to date, order information.

## Pipeline management

Pipeline management is the process of managing the entire sales cycle, from identifying prospects, estimating sales potential, managing leads, forecasting sales, initiating and maintaining customer relationships, right through to closure. It relies on accurate, up-to-date opportunity information, such as the potential size and close date for each opportunity.


**Figure 14.5**
Opportunity management report[10]

A well-defined sales pipeline helps minimize lost opportunities and breakdowns in the sales process.

## Product encyclopaedias

A product encyclopaedia is a searchable electronic product catalogue that generally contains product names, stock numbers, images and specifications. These can be stored on representatives' computers and/or made available to customers online.

## Product configuration

Product configuration applications enable salespeople, or customers themselves, automatically to design and price customized products, services or solutions. Configurators are useful when the product is particularly complex or when customization is an important part of the value proposition.

## Product visualization

Product visualization software enables sales representatives and customers to produce realistic images of products before they are manufactured. This is a useful application when linked to a product configurator. The image can take the form of a simulated photograph, three-dimensional model or technical drawing, and can include other related documentation such as specifications or prices.

## Proposal generation

This allows users to create customized proposals for customers. Users draw from a database of information to create proposals which, typically, are composed of several parts, some of which are customized, including cover page and letter, introduction, objectives, products, product features, services, prices, specifications, pictures, drawings, people, experience, resumes, references, approach, schedule, organization, scope of work and appendices.

## Quotation management

Quotation management software allows representatives and managers to quote for opportunities. This may be part of a broader order management capability. The software allows users to create, edit, approve and produce costed, customized, proposals quickly and reliably. Some vendors enable users to create multimedia proposals with audio, animation and video. One survey suggests that proposals produced with software have a much higher win rate (46 per cent) than proposals produced manually (26 per cent).[11]

## Sales forecasting

Sales forecasting applications offer sales representatives and managers a number of qualitative and quantitative processes to help forecast sales revenues and close rates. Among the qualitative methods are sales team estimates, and among the quantitative methods are time-series analysis and regression models (covered in Chapter 5). Accurate sales forecasts help resource allocation throughout the business.

## Territory management

Territory management software allows sales managers to create, adjust and balance sales territories, so that sales representatives have equivalent workloads and/or opportunities. Some territory management applications come with a territory management methodology which users can follow when establishing sales territories.[12] Some applications link to geographic mapping or geodemographic software. The software enables companies to match sales coverage to market opportunity, create sales territory hierarchies (e.g. cities, states, regions) and reduce the cost of selling by reducing travel time. Call cycle scheduling, calendaring and lead management is often enabled by the software.

## Workflow engineering

Workflow engineering software is useful for designing sales-related processes, such as the lead management process and the event management process. It can even be used to design the selling process itself – the series of steps that a sales representative must follow in shifting a prospect from initial awareness to closing the deal.

Although we have thus far discussed a generic set of sales-related functionality, SFA software is also designed for context-specific applications. For example, sales representatives selling liquor to a retail store might employ software that recommends planograms, optimizes the allocation of retail display space, audits inventory levels, recommends prices and controls cooperative promotional support. In some contexts graphics, video and sound support is important. Some SFA vendors offer functionality designed for salespeople in particular industries. Siebel, for example, offers customized solutions for over a dozen different industries ranging from aerospace and defence to transportation. SAP have pre-configured applications for over two dozen industry contexts.

Most SFA applications can generate a wide range of standard and customized reports which are useful to salespeople, sales managers and executive management, as shown in Table 14.3. Salesforce.com, for example, offers over 50 standard reports and also enables users to construct their own customized reports using wizards. These deliver charts, tables, text and other graphics to receivers' devices. Dashboards deliver real-time sales data to executives that can be refreshed at a single click. Customized dashboards ensure that people receive reports matched to their roles and responsibilities. Drill down capabilities mean that users can thoroughly investigate the reasons behind results in dashboard reports. Furthermore, dashboards can be integrated with third-party analytics to deliver deeper analysis of sales performance and problems.

**Table 14.3** Examples of reports available from SFA software

| | |
|---|---|
| cost-to-serve | sales cycles |
| customer profitability | share of market |
| lead conversion | share of wallet |
| pipeline progress | sales person productivity |
| quotation performance | win–loss rates |

# SFA adoption

Generally, a company's determination to adopt SFA follows a two-step process. First senior management decides to invest in SFA and, secondly, sales representatives and their managers decide to use SFA. Both groups, senior managers and users, will anticipate benefits from SFA and unless those benefits are delivered SFA may be abandoned.[13]

## Benefits from SFA

Vendors and consultants claim a number of benefits from SFA implementation, including accelerated cashflow, shorter sales cycles leading to faster inventory turnover, improved customer relations, improved salesperson productivity, increased sales revenue, market share growth, higher win rates, reduced cost of sales, more closing opportunities and improved profitability. These benefits appeal to differing SFA stakeholders:

- **sales people**: shorter sales cycles, more closing opportunities, higher win rates
- **sales managers**: improved salesperson productivity, improved customer relations, accurate reporting, reduced cost of sales
- **senior management**: accelerated cashflow, increased sales revenue, market share growth, improved profitability.

In addition to these measurable outcomes, there may be additional benefits such as less rework, more timely information and better quality management reports. Software vendor case histories of SFA implementations offer testimonials to SFAs impacts (see Case 14.2 Freight Traders).

Independent research, summarized in Table 14.4, suggests that the primary motivation for implementing SFA is improved efficiency, although not every SFA implementation has specified formal goals.[14]

| Motivation | % of sample reporting |
| --- | --- |
| Improve efficiencies | 72 |
| Improve customer contact | 44 |
| Increase sales | 33 |
| Reduce costs | 26 |
| Improve accuracy | 21 |

**Table 14.4** Motivations for implementing SFA[15]

## Case 14.2

### Freight Traders enjoys benefits from SFA

Freight Traders, a subsidiary of global food manufacturer Mars Incorporated, is a web-based logistics consultancy that connects shippers to carriers. The company facilitates the transit of cargo between the two parties. Customers include Kellogg's, Lever Faberge and Sainsbury's Supermarket Group. Garry Mansell is Managing Director.

'We had the system up and running in three days', says Mansell. 'Within eight days the whole company was using it across multiple countries. Ease of use and speed of implementation were everything I expected of a web-based solution'. Major benefits include far greater customer, lead and prospect visibility. 'We operate dispersed account teams and they now have a single view of customers and prospects'. Another major benefit is accessibility. 'Regardless of where I am in the world, I only have to log on to see how our business is doing', he says. 'The reporting tools are really useful to our business', continues Mansell, 'we don't need to waste time chasing sales teams for reports. Once we input the information, reports are automated and can be tailored to our requirements'. Mansell finds these reports a valuable tool to the running of the business. It helps the company focus on maximizing resources by identifying where and when the best sales opportunities arise and responding to them. Freight Traders uses salesforce.com to communicate best practices across the organization. 'Because the system is so transparent we can show clearly what works best with a particular company, country or industry and share that vital intelligence across the organization. All the information is contained in our salesforce.com account'.

Source: Salesforce.com[16]

# How SFA changes sales performance

There have been a number of independent assessments of the effects of SFA on sales performance.[17] One empirical investigation of a pharmaceutical company's operations in three countries finds a clear relationship between SFA adoption and salesperson performance. The researchers conclude: 'Does the use of sales-force automation really contribute to higher sales performance? With overall sales growing and with 16.4 per cent of the variance in sales explained by the use of sales-force automation systems, this study suggests the answer is 'yes'.'[18] Another investigation found that use of SFA was associated with improvements in sales representatives' selling skills, knowledge and performance. This research found positive correlations between SFA implementation and sales representatives' market knowledge, technical knowledge, targeting skills, adaptive selling and call productivity. Essentially sales representatives with SFA support became more adaptable and productive. Sales representatives' use of SFA accounted for a small, yet significant, portion (7 per cent) of their sales performance.[19] However, not all research indicates positive outcomes from the implementation of SFA.[20] It seems likely that SFA will have more impact on sales performance when a number of conditions are met.[21] These include:

1. salespeople find that SFA is easy to use
2. salespeople find the technology useful because it fits their roles well
3. availability of appropriate-to-task SFA training
4. users have accurate expectations about what SFA will deliver
5. users have a positive attitude towards innovation
6. users have a positive attitude towards technology

7. availability of user support after roll-out, for example, a helpdesk
8. involvement of user groups, including sales representatives and managers, during project planning and technology selection
9. deployment of a multidisciplinary team in the project planning phases
10. senior management support for SFA.

It is SFA users, not technology firms, who decide what is easy to use. Some ease-of-use considerations include screen design, the use of a graphical user interface (GUI), system navigation, online help, user documentation, data synchronization and system support. Screen layouts that are clean, bright, appear uncluttered and are easy to navigate are appreciated. User interfaces are best if purpose-built for a particular screen layout. For example, it is not acceptable to take a PC screen design and merely cut it to size to fit a PDA screen. A graphical user interface essentially involves the use of a pointing device and graphical icons to control a computer. The most common GUI is the Microsoft Windows system, which is deployed throughout the Microsoft Office suite and related products. The basic components of a GUI are a pointer on the screen, a pointing device such as a mouse, graphical icons that represent commands, files or windows, a desktop where these icons are assembled, windows which divide a computer screen allowing several files or programmes to be run simultaneously, and menus which allow users to execute commands. System navigation is good if users can move from field to field, screen to screen, and function to function with no difficulty. Online help that is available at field-level, as well as screen-level, is valued by users because it means they can resolve questions quickly. User documentation that includes screenshots and textual explanation is appreciated, as is simple, fast, data synchronization and general system support through training and a helpdesk.

# Summary

Sales-force automation is a competitive necessity which involves the application of technology to support salespeople and their managers. Broadly, SFA enables members of sales teams to become more efficient and effective in their job roles. The SFA ecosystem includes a wide range of software, hardware, infrastructure and service organizations. SFA software offers an enormous range of functionality, including account management, activity management, contact management, contract management, document management, event management, incentive management, lead management, opportunity management, order management, pipeline management, product encyclopaedias, product configuration, product visualization, proposal generation, quotation management, sales forecasting, territory management and workflow engineering.

Three stakeholder groups – salespeople, sales mangers, and senior management – have a particular interest in generating benefits from SFA adoption and each may have a different take on success. For a salesperson, success might mean 'increased commission' or 'more time released from administrative tasks for selling'. For a sales manager, success might be 'better management of underperforming reps'. For senior management, success might be 'improved market share and reduced cost-to-serve'.

None of these benefits are likely to be delivered if salespeople fail to adopt the technology. Adoption is more likely if salespeople find the technology is useful, easy to use and they receive appropriate training.

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