MONDAY MOTIVATOR

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Monday Motivator is a weekly business publication aimed at managers. From senior Vice Presidents to Directors, retail managers and supervisors, management is all about purpose, mission, strategy, action, staff guidance, leadership, communication, training, measuring and reporting. But there are a few other issues that make up the position of the manager. Perhaps one of the more important one is that realm of activity tracking and reporting commonly referred to as Sales Force Automation (SFA). Reporting functions of SFA are one of the key features.
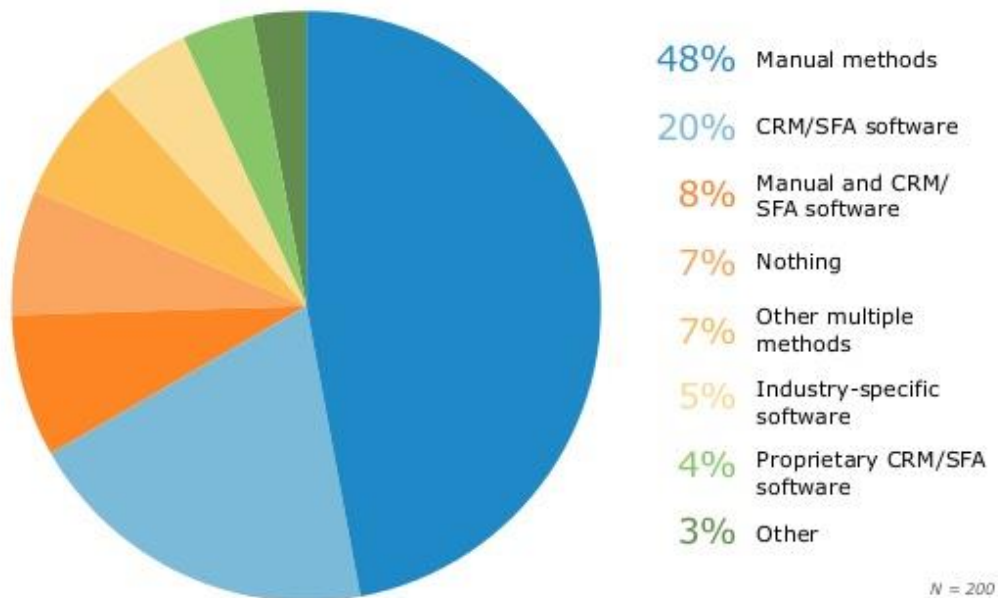

This edition will focus on a light overview of what SFA is and how it differs from CRM (Customer Relationship Management). Let's start with what SFA is. Sales force automation (SFA) software is a type of program that automates business tasks such as inventory control, sales processing, and tracking of customer interactions, as well as analyzing sales forecasts and performance. Businesses may have a custom version developed specifically for their needs, or

choose from among a large array of sales automation software products. Some of the more familiar names include ACT, GoldMine, Pipedrive, Infusion Soft, Team Support, Fresh Desk, Prophet, Net Suite, Spice Works, Plan Plus Online, or Sales Force. And these are just a sampling of the many titles available for any business depending on needs, desires and budgets. You can see demos of all these and more such titles at: http://www.softwareadvice.com/crm/

It's easy to confuse SFA software with what is sometimes called customer relations management (CRM) software. CRM software consolidates customer information and documents into a single CRM database so business users can more easily access and manage it. The other main functions of such software include recording various customer interactions (over email, phone calls, social media or other channels, depending on system capabilities), automating various workflow processes such as tasks, calendars and alerts, and giving managers the ability to track performance and productivity based on information logged within the system. CRM is more widely seen in call centers where inbound calls arrive from customers seeking support for a product or service they have purchased.

SFA software does pretty much the same with a few important exceptions. Here are the high points of what companies operating in the U.S.A. report when shopping for an SFA solution.

Many Still Use Manual Methods

48%	Manual methods
20%	CRM/SFA software
8%	Manual and CRM/SFA software
7%	Nothing
7%	Other multiple methods
5%	Industry-specific software
4%	Proprietary CRM/SFA software
3%	Other

N = 200

While a third of buyers are currently using a CRM or SFA system, nearly half of buyers still rely on manual methods to manage their sales activities.

So what key metrics do we see when senior management considers investing in a comprehensive measuring, tracking and reporting system?

- They want activity entry functions that sum up departments or sales territories / regions and report on such activities.

- They also want to see summaries of the various steps of customer interaction to show the success rates that point to conversions to sales, expansion of sales or customer retention.

- Most companies want real time reporting that allows more accurate forecasting of various metrics that show competitive positioning.

- Finally, all companies looking at SFA / CRM software solutions want to know where they need to make corrections, implement training or consider staffing changes as a result of the reports.
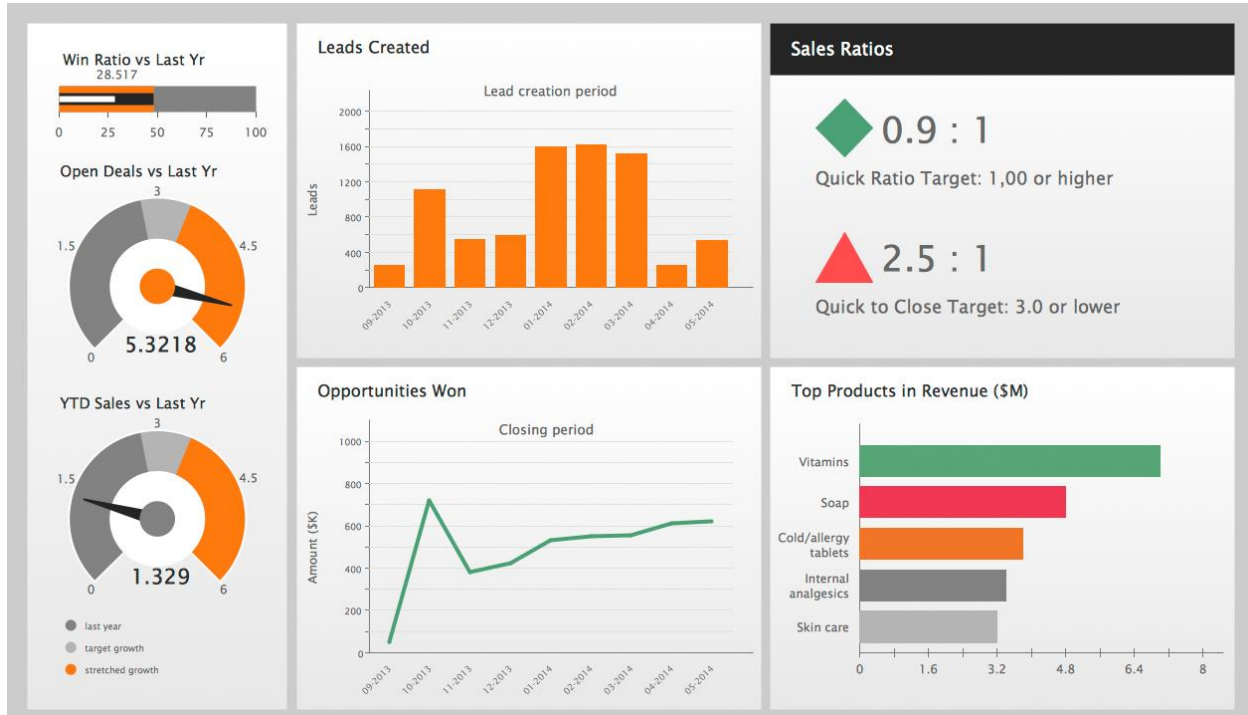
Sales force automation software is meant to help sales teams close more deals and reduce the number of time-consuming tasks associated with selling. Savvy businesses recognize its value for streamlining the sales process, gaining visibility into the sales pipeline and providing real-time data to help sales managers quickly make informed decisions. SFA software can also help companies maximize profits by using fewer people to get more done in less time.

However, SFA is just one part of the greater customer relationship management (CRM) software market. There are many products available, which can make purchase decisions quite complex.

This is particularly true for small-business buyers, who may have different needs than buyers from larger organizations. Within sales teams, there are often systemic issues that make using such software—and getting sales reps to use it—even more challenging.

There are two considerations to take into account once the decision has been made to utilize SFA and or CRM packages enterprise wide:

A. Make the use of such tools mandatory. Do not allow it to be optional. Every sales manager up and down the org chart must sign on to make the corporate investment do its job.
B. Training is absolutely essential. SFA / CRM apps are not that simple to use. Our firm has delivered training programs on ACT, Goldmine, Sales Force and a few others. To say the least, such programs require dozens of hours of classroom time with online coaching and webinar support to keep the initial adoption rate and day to day utilization moving forward. This is all focused on getting the whole retail enterprise on board, no matter whether the company value proposition is products, services, or both.

There are basically four key benefits of a well-designed SFA / CRM program.

Ease of Use – It stands to reason that one of the single most important elements of any software program is its ease of use, this is particularly true considering that most CRM programs are targeted to a broad range of companies and business, many of whom may not have a background in tech and software. For the CRM to reach its full potential it must be easy for even novice users to work with.

Good Functionality – A good program must deliver an outstanding system of integration and functionality. The CRM provides the backbone service needed to allow easy data collaboration between multiple departments, centralized customer information, an array of reports and statistical options, and the ability to run on any browser, tablet, desktop, or mobile device.

Flexibility and Customization – A good SFA / CRM program should have broad applicability for a wide range of different companies and businesses. The key to this successful approach is in its flexibility and customization potential.

Additional User Resources – Nearly every company benefits when resources beyond an owner's manual are available through consulting firms, coaching specialists and online content that supports the adoption and use of such important software solutions. Most of the big names in the SFA / CRM space can confidently boast of such support because it exists.

Until next time I'm Will Robertson sending you good wishes from all of us here at Performance Strategies, Inc. / Management Consulting Group.

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