

Increase SFA Adoption With Sales Process Mapping

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Increasing sales force automation adoption begins with institutionalizing sales processes in advance of technology deployment. Sales process mapping identifies the data, actions and output for each role, and the metrics.

WHAT YOU NEED TO KNOW

Sales process adoption is a prerequisite to technology deployment. Sales process adoption occurs when the input, action and output of the process increase performance. Successful sales organizations will model the behaviors of top salespeople, then replicate their success throughout the selling enterprise through defined sales processes. Once processes are institutionalized, SFA technologies can be developed based on the blueprint of a process map. Sales organizations attempting to deploy technology in the absence of institutionalized-process adoption will see failure rates exceeding 80 percent for SFA initiatives (0.8 probability).

STRATEGIC PLANNING ASSUMPTION(S)

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ANALYSIS

Productivity increases related to IT remain elusive for direct sales organizations, primarily because of low adoption rates by salespeople. Field sales, in particular, have rejected sales force automation (SFA) technologies for a variety of reasons, including lack of perceived value and ease of use. No technology will achieve return on investment (ROI) commitments with partial or low adoption by users.

To fully realize the ROI potential of technology investments, direct sales organizations must first be actively engaged in the regular use of their sales processes before the technology is deployed. Committed sales leadership, solid technical deployment and a conscious strategy for change management have proved to be essential in increasing technology adoption, yet they do not guarantee success. To be successful, sales automation technology must replicate, automate, reinforce and communicate the organizationally accepted and practiced sales process. Process drives productivity and technology powers process. Sales process mapping is an exercise to ensure that the technology to be developed matches the business process in practice.

Sales Process Adoption

Core sales processes (see Note 1) are replications of the best, proven selling practices that top salespeople use to manage their territories and opportunities to consistent levels of overachievement (see "Sales Processes — Foundation for Success"). Sales processes also identify how various extended sales resources work together in team selling environments or in conjunction with marketing for content and leads, customer service for support, or finance for pricing.

The challenge is that most sales organizations have poorly defined or informal selling processes for account management, contact management and opportunity management. Processes for managing sales business reporting, such as pipeline management and forecasting, may be more clearly developed, but focused primarily on the collection of numbers rather than the integrity of the sales actions — that is, the execution of the process to generate reliable output. Although business reporting addresses a management need, it provides little value to salespeople. In the absence of process maps, the enterprise, to direct the actions of its selling resources, is depending on the individual salespeople to "figure it out" when markets change, which leads to dependence on individual sales talent. Talent is difficult to replicate and impossible to automate.

Sales Process Mapping

Sales process mapping is a conscious effort to define the data input, actions and output of each sales process. It specifies the roles, their responsibilities and the appropriate metrics. First broken down by individual processes, which are then linked together and integrated, the sales process becomes a road map to achievement for all sales in addition to reducing new-hire startup time. Extended resources like marketing can build their processes to integrate seamlessly into the sales process, promoting collaboration and efficiencies.

A process map defines the data elements from the enterprise, such as name, address, phone number, historical revenue, order status or installed products. It will identify the sequence of actions or activities to be completed and then generate an outcome that will initiate the next event. The output of the process, such as status change in the sales cycle, additional product interest and revenue potential, creates real-time intelligence that is tactically used by the salesperson to advance the opportunity. When captured and shared through technology, it can be leveraged by the enterprise to increase market visibility.

For example, in a simple process to forward leads to sales from marketing, the data required from marketing is the lead name, address and phone number, as well as the area of interest or promotion that attracted the prospects' attention. The steps taken by sales (see Figure 1) are to contact the prospect, confirm interest, identify business opportunity and arrange for the next level of interaction, be that a face-to-face sales call or additional information with agreed-to follow-up steps. The positive outcome of this process is to advance the lead as a qualified opportunity, which results in its entry into the sales cycle, or, negatively, the reason for the dismissal of the lead. Measuring lead conversion rates will identify real customer interest better, focusing future campaigns.

Figure 1. Field Sales Lead Acceptance Process

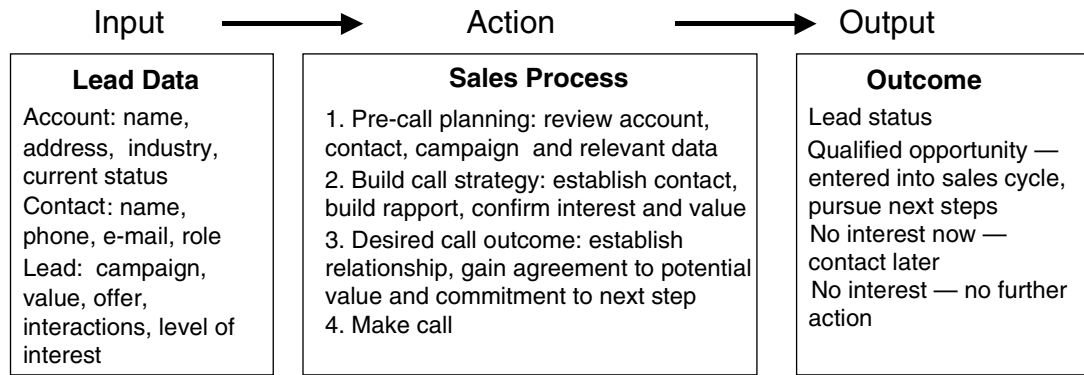
Objective: Provide sales with leads that will create qualified opportunities

Process:

Send lead data to correct salesperson

Sales contacts lead — determines status

Feedback lead outcome and status



Role	Marketing	Sales	Sales
Metrics	Number of leads, complete data, time to sales	Total leads, percentage of leads acted on, time from receipt to action, open leads, number of calls to contact, actual contacts	Lead status, revenue per lead, lead to close, time to close

Source: Gartner Research

Process mapping creates a "playbook" that allows the extended sales team to function collaboratively and efficiently with clear expectations of execution and common goals. Communication, training, coaching, expectation setting and inspection by sales management ensures that each role fulfills its responsibilities. When breakdowns or bottlenecks arise, the process owner can quickly identify the source and get the problem resolved. As business and markets change, the process map can be altered and adjusted to meet the new demands. Process maps become the blueprints for technology development. Technology deployed in support of a functioning process is readily adopted and used by salespeople.

What to Do?

Prior to acquiring technology, direct sales organizations should identify and document the core sales processes they wish to automate. Inspect these processes and confirm that they are used regularly by the targeted sales organization and have sales management support. Then, evaluate a vendor's ability to configure its application to match current process maps. Should customization be required, sales and IT leaders should carefully consider the trade-offs of the technical implications and cost of customized code creation against the behavioral challenges of changing the sales organization's work process to match the technology. In either scenario, the process in use by sales must be matched by the automation deployed for adoption to be ensured.

Key Issues

How will sales organizations use technology to meet the challenges of changing internal and external forces and business and market dynamics?

Note 1

Core Sales Processes

Account Management: Standardized approach to the development, growth and retention of long-term, highly profitable, customer-centric client relationships

Contact Management: Tactics and strategies for developing, maintaining and leveraging executive-level decision-making relationships and successfully planning, preparing and executing the senior-level sales call

Opportunity Management: A structured methodology for identifying, analyzing and closing complex, multi-decision-maker value-driven competitive sales situations as solutions or transactions

Each process is adapted for the unique requirements of the sales tier, sales cycle and vertical market.

Recommended Reading and Related Research

"Re-engineering Lead Management"

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