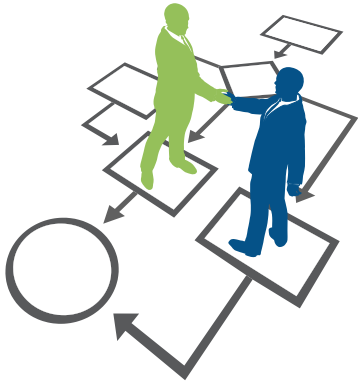


Making Sales Process Management Work

White Paper

A blurred image of a businessman in a dark suit and tie, holding a black pen and pointing at a bar chart. The chart has several green bars of varying heights. A white box with the word "SALES" in green text is connected to one of the bars by a thin white line.

SALES



Salespeople spend less than 45% of their time actually selling; much of the rest of their time goes to administrative tasks.

Hiring top-quality reps isn't enough to build a successful sales operation. You also need a sales process. Maybe the Sandler Sales System. Or SPIN Selling. Or the Miller-Heiman Strategic Selling Method. Whichever process you implement, you need to ensure it is predictable, repeatable and scalable. But even that isn't enough. You must then ensure your reps use and benefit from your sales process. For that you need **effective Sales Process Management**.

Meet Jeremy, a superstar sales representative for a growing medical device maker — growing in no small part due to Jeremy's mind-boggling selling ability. Jeremy finds his own leads and cultivates prospects among the largest hospitals and medical groups in his territory. Then, like clockwork, within 60 days of finding a new opportunity Jeremy closes the deal, usually much larger than the company's average sale. The board of directors calls him "the magician" and the CEO describes his style as "sales art." His success rate is amazing. How does he do it?

Exactly. How does he do it? Jeremy's Sales VP would sure like to know. So would the company's 17 other reps scattered throughout the country — most of whom have no sales methodology and who spend their time cold-calling and asking for meetings.

WHY SETTLE FOR JUST ONE SALES STAR? REPLICATE YOUR TOP SALES REPS' SUCCESS.

When you run a sales organization, you do not want to have to describe your team's successes with terms like "art" or "magic." A naturally gifted salesperson would certainly be a welcome addition to your team, but that method — waiting for a Jeremy to walk through your front door — doesn't scale. The only way to ensure a successful sales organization is to demystify the selling process for your team, to take it from a hit-or-miss effort to a predictable, structured process that any salesperson can use to succeed.

SALES PROCESS MANAGEMENT: WHAT IT IS AND WHY YOU NEED IT.

The Jeremy anecdote illustrates the value of creating a proven, repeatable process for closing a deal — and ensuring every rep uses it. We can define this as **Sales Process Management**. It entails formalizing a step-by-step sales methodology, providing your reps with easy access to it, and tracking the results so you can always modify it based on new input from the field.

There is a lot of confusion between familiar CRM tools and the next generation of Sales Process Management, or “SPM,” solutions. But the two are not the same. A CRM solution helps your reps organize their information about prospects, track progress on all leads in their pipeline, and access company assets such as contracts and marketing collateral. An SPM application then takes this content in your CRM system, and builds a process on top of it – showing each rep exactly what to do next at each stage of the sales cycle.

LEVERAGING “CHEAT CODES.”

Here’s another way to think of SPM. Imagine playing a video game. Your CRM solution acts as your toolset — joystick, buttons — and provides you regular updates on your score and the number of “lives” you have remaining, and reminders about how many levels you have left until you reach the treasure and win the game.

Those tools are all helpful and valuable. But then SPM comes along – and offers you “cheat codes” that actually walk you through the moves that will ensure (or at least vastly boost the odds of) your success. Don’t stand there — it’s a trap door! Grab that rope — it’s a shortcut to the next level! Next thing you know, you’re collecting your treasure.

WHAT SALES TEAMS USE NOW FOR SALES PROCESS MANAGEMENT (IF THEY USE ANYTHING).

When it comes to Sales Process Management, sales organizations can run the gamut. On one end of the spectrum is the sales office depicted in the Broadway play and Hollywood film *Glengarry Glen Ross*. In this office, there is no sales process. The leads are mysteriously delivered on 3x5 cards to the sales manager, who guards them in his office and then distributes them to his reps as he sees fit. Are the leads qualified? Not even close. In fact, the sales manager knows just by looking at one card, for example, that the person “just likes talking to salespeople.” Once they receive a lead, the reps are on their own.

Obviously you don't want to hand your sales reps a stack of unqualified leads and tell them to give it their best shot. You need to develop a process, a step-by-step plan your reps can follow to give themselves the highest possible odds of success with each lead.

But developing a sales process is only part of the formula for your team's success. Assuming the process itself is effective, you then need to make it available to your team in the most effective, intuitive format possible.



If you create a cumbersome process that your reps view as just another task, rather than a tool to help them sell more, you create several problems for your organization:

1. **Your process is so cumbersome that some of your reps won't use it.**

When a sales process requires too much manual input, or appears too time-consuming or intimidating, many reps will simply ignore it and try their own methods. For those reps, all effort put into developing the sales process was wasted.

2. **Your reps waste much of their time on the wrong tasks.**

Sales organizations often require as part of their sales process that their reps prepare lengthy progress reports. While this information might prove useful to the organization — if the right people spend enough time analyzing it — the immediate effect is to pull their reps out of the field for large swaths of time to fill out paperwork instead of selling.

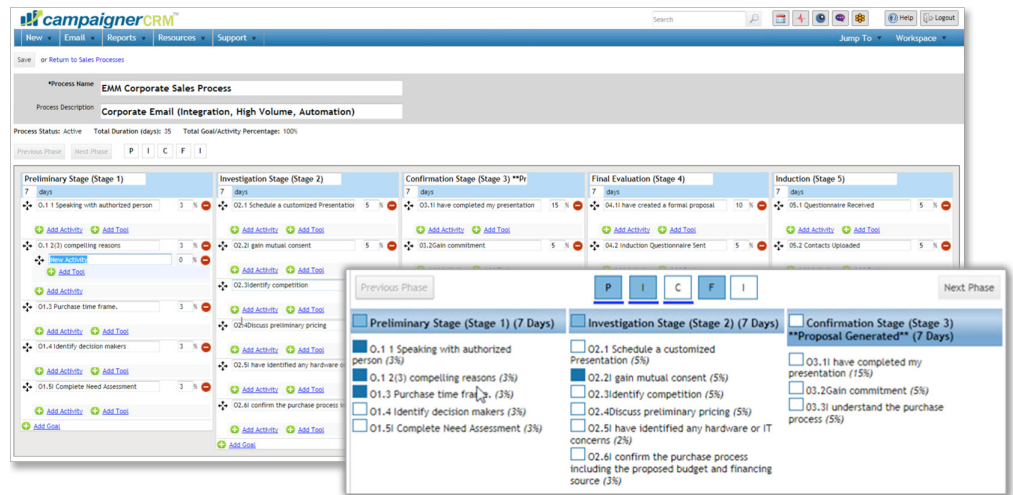
3. **Your process doesn't allow for quick feedback and improvement.**

Sales Process Management should be iterative — it takes time to learn what works and to continually tweak, test and improve the whole system until your sales process is a surefire method for success. But if your process is so clunky that your reps don't want to use it, you will miss out on valuable, real-world feedback that could help improve the sales process for everyone.

WHY THE RIGHT SPM TOOL CAN BE THE DIFFERENCE BETWEEN SUCCESS AND FAILURE.

The ideal SPM solution, then, will allow you to use all of your sales organizations' collective knowledge and wisdom to build step-by-step processes that are intuitive and help your reps organize their selling efforts. Additionally, with the right SPM solution, you will be able to update these processes anytime, instantly, to continually improve the process for your entire team.

What makes such an SPM tool useful is that the format and presentation of the process are straightforward, intuitive and automated. A rep can simply pop open an opportunity in her pipeline, review the steps she's completed, and begin work on the next steps in the process. If the next step is to send a follow-up email (because she hasn't heard from the prospect since delivering her presentation), the rep can choose from one of the email templates in the process — for example, a free white paper from her company with some tested pre-written language in the body of the email — to re-open the dialogue. Then she can check the "completed" box for that step and move on to other leads.



Partial views of sample sales process in CampaignerSPM™

Rather than bogging your reps down with more administrative tasks, this type of intuitive SPM tool actually helps with each stage of the selling cycle. Indeed, your reps will actually want to use this tool, because it removes the guesswork about what to do next at any stage of the cycle.

For sales managers, this type of SPM tool offers many additional benefits:

1. All of your reps can implement sales processes that reflect the best sales knowledge your company has gleaned — from the right language in emails, to the right collateral to send at the right time, to assigning percentage values for each step's importance and contribution to the sale.
2. Because your reps can update their progress quickly and easily at each step in the process, you will receive more feedback from across your team, giving you a clearer picture as to what's working and what isn't throughout your process.
3. Because creating or updating sales processes is so simple with this type of tool (you can do it in minutes), you'll be able to take what you learn viewing your reps' reports and apply it to updating and improving the processes for your team.
4. By creating a step-by-step sales process that reflects the best sales knowledge from across your company, you're creating a "bulletproof" selling method — one that even an average salesperson can follow to generate outstanding results!

A POWERFUL SALES TRAINING AND ON-BOARDING TOOL.

Another advantage of the right SPM tool is that it can serve as a great way to bring new salespeople up to speed. What could be better to show a sales rep new to your organization than a fully formed sales process that your reps in the field are currently having success with?

The right SPM tool will help shorten the learning curve for your new reps, help build their confidence more quickly, get them closing deals sooner — and help you scale your sales organization more effectively.

ALWAYS LEARNING, ALWAYS IMPROVING: HOW SALES MANAGERS CAN USE THE RIGHT SPM TOOL TO CONTINUALLY IMPROVE THEIR SALES PROCESS.

The book *Wikinomics* opens with a story of a struggling gold-mining company, not sure where next to deploy its expensive resources for drilling. The owner tried something perhaps never done before: He posted all of his company's proprietary data on the Internet, asking geologists and other scientists from around the world where they thought he'd have success drilling. And he offered rewards for advice that led to gold. Some of the foremost experts in the world reviewed the data and submitted suggestions — and soon the company's revenue went from \$100 million to more than \$9 billion.

What does this have to do with Sales Process Management? One of the great benefits of our connected era is the ability to share knowledge and expertise across large groups and vast geographical distances instantly.

If your organization is running without an effective sales process — relying, instead, for much of your revenue on a couple of Jeremy-like superstars — you are probably missing an opportunity to take the knowledge that those few top performers have gleaned, and transfer it to the rest of your sales staff.

CONCLUSION: EFFECTIVE SPM IS SALES GOLD!

With the right SPM tool, you can easily view what your top performers are doing, then use that information to build, update or recreate sales processes that turn those “magical” success steps into part of everyone’s process — so your whole sales team can replicate and benefit from them.

In the same vein, if the regular field updates to your SPM tool reveal that a certain step in your process is a sticking point with prospects — which you will see if that step is where an unusually high percentage fall out of the pipeline — you can quickly update your process to fix (or remove) that step.

Having an effective SPM application deployed across your organization, therefore, means you are able to take all of the collective knowledge and lessons learned from your sales reps — and use it to continually improve the sales processes across your entire organization.

No magic required!

COMPANY OVERVIEW



CampaignerCRM™ is part of publicly traded j2 Global, Inc. (NASDAQ: JCOM) — the world’s leading provider of cloud-based, business-critical communications and storage services.

Founded in 1995, j2 Global provides outsourced, value-added messaging and communications services to individuals and businesses around the world. The company offers fax, voicemail and document management solutions, Web-initiated conference calling and unified-messaging and communications services. j2’s Global network spans more than 49 countries on six continents. Serving more than 12 million subscribers worldwide, j2 has offices in nine cities around the world, accepts payment in twelve currencies, and provides customer support in more than seven languages. To learn more about Campaigner and our big-data solution, Campaigner Elements™, please visit us at www.campaigner.com, or contact us at 866-358-6388. To learn more about j2 Global™, please visit www.j2global.com.