

"Cool Tools" for Successful Implementations

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So, you're considering a sales process or have already taken the plunge. Far too many training initiatives wind up being an event, or a "program du jour", and they die on the vine. To avoid this, companies that have achieved a significant return on their investment in a standardized sales process **prepared for what needed to happen AFTER the training session**. Let's focus on what is needed to ensure that your **process is successfully implemented and reinforced**. I've also come across a few "cool tools" to simplify your efforts.

Begin with the End in Mind

One of Steven Covey's seven habits for highly effective people is to, "Begin with the end in mind." Few would argue that a winning sales team is a critical component of successful companies. **Winning sales teams don't just happen. They must be developed.** Yet, many companies are in a fog as to how to do this. So, let's visualize what a winning team looks like, then figure out how to successfully navigate our way there. I've even come across a couple of "cool tools" that can make this journey a lot easier.

It's relatively easy to visualize a winning football team. You i) start with talented athletes (ability), ii) provide the playbook (process), gear (tools), and coaching, iii) track and analyze their performance, and iv) refine the process to develop each player beyond their individual abilities. Make sense? Now let's look at a winning sales team. **I assume that most companies try to hire talented salespeople. But then what?** Are you providing a sales process and sales tools to help them perform? Are you able to coach them based on their individual needs? Can you accurately predict your team's results? If not, read on.

According to the 2004 Sales Effectiveness Survey from CSO Insights, 58% of companies do not have a standardized sales process in place. Perhaps that's why **more than 50% of salespeople didn't make quota in 2004**, which is the poorest performance in 10 years. You wouldn't take a group of talented athletes, throw them out onto the field, and simply tell them to "get out there and win!" So why do so many companies take a group of salespeople, even experienced ones, throw them out into the field, and simply tell them to "get out there and sell!"

So, **what's involved in applying a process to the role of selling, and how can you ensure that the implementation is successful?** The sales process isn't about sales training, i.e. an event. It's all about a disciplined approach, or process change, that leads to more predictable results. Visualize that the sales process defines the steps in the process (what to do) along with the corresponding skills and tools required to perform each step (how to do it).

Recommendations for Success

As I work with companies that are considering the CustomerCentric Selling® sales process, **I recommend the following for successful implementations**. I want them to "begin with the end in mind" and make sure they know what to do following the actual training.

- **Lead by Example.** How likely is it that a new product will get launched, or new people hired, or a new process adopted without executive-level endorsement? Not likely at all. Similarly, **successful (and sustainable) adoption of the CCS sales process requires the involvement of executives and sales management**. They must learn the process, incorporate the process into their daily business activities, manage and coach people to the process, and track results and refine the process over time. This sounds daunting, but we work with clients to make this as painless as possible. Executives attend a CustomerCentric Selling® workshop, typically in advance of their salespeople. They then

have the option to attend a 2-day session (click [here](#) for details) focused on how to analyze pipeline reports, and manage and develop people using the process. Finally, on a quarterly basis, they meet with the CCS consultant to review key success metrics to ensure that the process is leading to the desired results.

- **Assign a Head Coach.** Many executives and sales managers have too much on their plates to oversee the CCS implementation. We recommend that you assign an internal champion to do this for you in the initial stages of the implementation. **This is your go-to person** to make sure that the salespeople, your Marketing staff, the CCS consultant, and possibly even your CRM consultant are all working in tandem.
- **Fill the Locker with Gear.** There's a big difference between education and training. You can become educated about golf, for example, but will never be proficient without hands-on training. Similarly, **salespeople must be given the appropriate tools to become proficient.** During the CCS workshop, the salespeople will have **skill practice sessions** (aka role-plays) that help them try out new behaviors. Another key component is the CCS **Sales Ready Messaging® tools**, tailored to your actual customers and offerings, that are used during and following the workshops. One example is a prompter that can be used during sales calls to help the reps ask diagnostic questions about the prospect's business issues, and corresponding questions to pose your offerings in a way that addresses these issues. **Think about how much easier it would be for salespeople to call at the executive level if they knew what to ask or say when they got there.** Other tools include success stories, cost/benefit templates, and follow-up letter templates. Following the workshops, salespeople are hungry for SRM tools because they help them consistently apply the process to enhance their performance. These tools are typically created by Marketing and distributed to Sales via email, or their Intranet, or their CRM application. **One of the "cool tools" I stumbled upon recently is an application called TagTeam® offered by Longwood Software.** TagTeam® is a web-based solution for managing and distributing all of your marketing materials to the field. Think of it as a searchable on-line library and the one-stop-shopping resource for salespeople and sales channels in the field. It's easy to use, very affordable, and can be up-and-running in a matter of hours instead of days, weeks or months.
- **Pump Up the Team.** Not many salespeople, particularly experienced ones, look forward to 3.5 days of sales training. I believe that **how the process is described and positioned can go a long way towards helping salespeople open their minds to learning something new.** First, CCS is not about teaching people how to sell. If reps didn't already know how to sell, they wouldn't have been hired. Instead, CCS is a comprehensive sales process —developed for how today's buyers want to buy—that addresses the entire sell cycle. Position CCS as a "best practices" process change and an investment in the development of the team.
- **Check the Score Board.** Two components of Six Sigma - leading indicators, lagging indicators -- truly reveal the value of pipeline reporting. Lagging indicators are metrics that have already occurred, e.g. sales revenue, cost of sales, quota attainment, and you can't really do anything about the past. Leading indicators are factors that lead to, or are predictive of, results, e.g. # of qualified opportunities in the pipeline, # of opportunities at various phases in the pipeline, historical close ratios at each phase. **If you can monitor pipeline activity in advance of the actual result, then you have the opportunity to detect problems and take action.**

Another recommendation, therefore, is to develop a pipeline reporting system. This can be as simplistic as an Excel spreadsheet or as elaborate as a CRM application, e.g. Salesnet, Salesforce.com, ACCPAC. Keep in mind, however, that **a CRM without a standard sales process in place may be doomed for failure.** As Mike Bosworth

states, "If you automate chaos, it just speeds up the mess." You want to grade each opportunity in the pipeline based upon an objective, and auditable, process.

We also recognize that **populating or updating a CRM system can be tedious. I came across another "cool tool" recently that helps with this.** eGrabber allows salespeople to point-and-click on contact information from various sources such as emails, websites, on-line yellow pages, address lists, and have this information ported directly to the CRM system. This minimizes the number of keystrokes (and errors) to enter names, addresses, phone numbers. It's a simple product, very easy to use, and helps save a lot of time.

- ***Stay in the Game.*** While implementing any process change takes effort, it's worth it if you do it well. Earlier I shared the pitiful sales results documented in CSO Insight's 2004 Sales Effectiveness Report. On the **top of their list of recommendations to improve the results was the implementation of a sales process.** CCS consultants will work with you to ensure a successful implementation.