



Inside Track Research Note

In association with



Taking Sales Performance to the Next Level

The role of effective
enablement and
operations

July 2016

Investments in CRM, modelling and analytics solutions deliver useful benefits, but sales performance can still be lacking.

If you live with issues and frustrations for long enough, you end up accepting them as 'just the way things are'.

If perennial challenges persist then it may be time to look at strengthening your sales enablement and operations capability.

In a nutshell

Many have invested in CRM and performance optimisation on the promise of solving all of their sales enablement problems. The reality is that such solutions only deal with some parts of the equation. The piece that is often missing is a comprehensive platform to enable sales processes at an operational level. Investments in this area have the potential to drive step changes in both efficiency and results-achievement.

Sales performance reality check

So you've invested in CRM, and maybe a set of sophisticated modelling and analytics tools to help you manage sales performance, but you still aren't getting the results you would like, and many of the same old challenges stubbornly persist. If you can relate to this statement, our discussion in this paper is for you.

Not sure whether it applies? Well it could be that you are enabling your sales teams and processes in a highly optimised manner. It may also be, however, that you have lived with some of the perennial issues and frustrations for so long that you have simply come to accept them as normal – 'just the way things are' – possibly to the extent that you have stopped even thinking about whether things could be done any differently. Consider the following frequently encountered challenges, for example:

- It takes a lot of time, effort and money to recruit a new sales person, then a further 3 or 4 months for them to start contributing. Some never make the grade at all, and the ones that do often move on before completing their second year, leaving a relatively short period to get a return on your investment.
- A big gap exists between your top and bottom achievers when it comes to sales performance, even though those you see struggling have often joined you with a good track record. You put this down to intangibles like cultural fit, personality, etc. There might be more to it than that; you just don't know what it is.
- You take care to optimise compensation plans, have good pipeline management discipline, and monitor key metrics, yet you still have limited insights into how deals are run. Sales reps play their cards close to their chest – that's the nature of the beast – and only tell you what they have to. This often catches you out.
- You want to see more face time or more productive conversations with clients, but your sales people tell you there are only so many working hours in a day, and a lot of them are spent preparing for calls and meetings, updating systems, and waiting for key resources such as specialist sales support staff.
- Sales teams complain about the lack of effective collateral, despite cupboards full of unused product literature, and a library of digital assets on your intranet that's rarely accessed. Meanwhile, your best performers are building their own sales tools, and frequently sourcing support material from elsewhere.
- You get information from your CRM and analytics systems, but whether it's for management reporting, feeding back to product marketing, or demonstrating compliance, it's often not in the form and at the level of detail you need. The traditional paper chase therefore remains a weekly, monthly or quarterly ritual.

If you recognise two or more of these challenges, then it may be time to look at strengthening your sales enablement and operations capability.

Back to basics

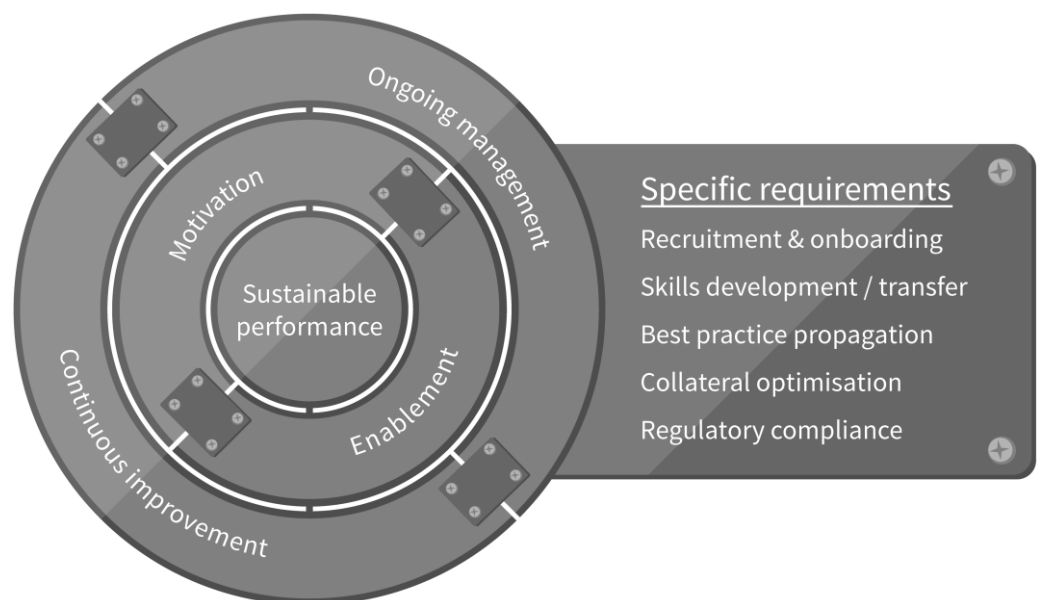
After championing investments in CRM modernisation or sales performance management, stakeholders are often reluctant to admit that key requirements still exist.

The first step towards driving improvement is an open and honest acknowledgement that the issues and frustrations exist. This may sound like an odd thing to say, but if you or another stakeholder have recently championed investment in CRM system modernisation or sales performance management tools, there could be some political barriers. It's easy to fall into the trap of positioning modern CRM, for example, as a magic bullet to vanquish all evil; technology vendors and cloud providers certainly present their offerings in this way. After a strong 'internal sell', it can be hard for sponsors to acknowledge that some needs have still not been fully addressed.

Once you have got past any such hurdles, the next step is to understand the true nature of some of the challenges we have highlighted. The truth is that many of these are actually symptoms of fundamental capabilities being absent or inadequate. We will come to these shortly, but first it's worth quickly standing back and reviewing what's needed to create a sustainable sales performance environment (Figure 1).

Figure 1

Creating a sustainable sales performance environment



Most of what's on this graphic is pretty obvious when you see it laid out like this. At the centre of everything is the principle that in order to perform, salespeople need to be motivated and properly enabled. One without the other doesn't get you very far - you need to deal with both. Ongoing management is then clearly important, as is continuous optimisation, especially when you consider that markets, competitors, customer expectations and your product portfolio don't stand still for long.

Coming at the challenges from the other direction, we can translate them into a number of specific requirements. Getting new recruits up to speed more quickly to accelerate time to value is one of these. Providing sales staff with more of what they need for success thereafter to reduce churn and extend and amplify ROI is another.

In practical terms there's a need for more effective skills development and transfer, and an ability to harvest and propagate best practice from high achievers. The aim is to get relevant knowledge, tricks and tips out of the heads of your best people and embedded into standard methods. The progress of new recruits is accelerated, low achievers can raise their game, and high achievers learn from each other.

At the centre of everything is the principle that salespeople need to be properly enabled as well as motivated.

It's often the 'Enablement' part of the equation that needs to be addressed in order to drive performance improvement.

You can take this further by optimising your collateral and other sales tools based on solid insights into what high achievers are using and how. This will push performance even higher, and potentially reduce marketing spend into the bargain.

With these requirements in mind, it's often the 'Enablement' part of the equation that needs to be addressed in order to drive performance improvement. Better enablement through greater repeatability and automation in a sales context will also help in areas such as compliance reporting, and feeding back to those in product management, marketing, finance, etc, so they can respond accordingly.

Practical approaches to driving improvement

The first thing to emphasise is that we are usually talking about a very real capability gap. Some make the mistake of thinking that they simply need to get sales teams to make better use of CRM. The truth, however, is that despite all of the hype around mobile access, information at your fingertips, and so on, most mainstream solutions and cloud services simply don't cater for the needs of front-line sales staff very well. Potentially useful functionality is there – e.g. to make information, assets and tools available to support the selling process – but the sales person typically has to work too hard to get at what they need, and often what they seek is not there in CRM anyway.

Shake that CRM-centric mind-set, and take an operational view

The trick is to approach the problem in a different way, and this begins with viewing sales activity through an operational lens. Effective selling clearly relies on a range of soft skills, but scalable and sustainable performance is equally if not more dependent on applying proven techniques and processes in a repeatable manner. In this respect, the sales function is no different to many other aspects of the business that have been optimised over the years through various forms of integration and automation.

In the context of a sophisticated sales environment the objective is not to automate sales people out of a job, or turn them into unthinking task workers. It's more about facilities that provide instant and easy access to everything they are likely to need at the time it's needed.

In recognition of this requirement, those with access to the necessary funding and technical resources have often invested in building mobile apps with custom integrations into various back-end systems – CRM, finance and admin, content management, collaboration, and so on. This DIY approach can help to close the enablement gap, but it's expensive and time-consuming, and typically creates a significant ongoing support and maintenance burden. Furthermore, the end result still usually relies on the sales person doing all the running.

A new class of technology solution – the 'sales enablement and operations platform' – has emerged to allow performance to be taken to the next level.

From passive access to proactive digital assistance

Sales enablement and operations platforms are designed with a clear vision of proactive digital assistance in mind. Similar to the primary objective of those taking the DIY approach, this starts with the idea of providing sales people with intuitive software running on their laptop, tablet or smartphone that operates across all relevant systems and resources. The difference, however, is that the software is a lot more proactive. It continually monitors what the sales person is doing, anticipates

The trick is to approach the problem in a different way, and this begins with viewing sales activity through an operational lens.

Sales enablement and operations platforms are designed with a clear vision of proactive digital assistance in mind.

The real productivity and performance benefits arise when everything happens in situ – i.e. while the sales person is sitting with the client.

their needs, and automatically offers (or has ready to serve up) whatever is necessary at a given point in time based on the context.

As a simple example, if the sales rep has just taken the customer through a specific product presentation, the system will proactively offer the opportunity of sending a follow up email with the appropriate literature. Same with the generation of a quote following a pricing discussion, or the suggestion of an alternative product or a potential cross-sell opportunity based on multiple choice answers to a few key qualification questions. And it's not just about the functionality itself; the real productivity and performance benefits arise when everything happens in situ – i.e. while the sales person is sitting with the client.

A kind of magic?

Like all good technology, a properly implemented sales enablement and operations platform can appear a bit 'magical' from the user perspective. Of course a lot needs to happen behind the scenes to facilitate the kind of proactive digital assistance we have described. It's beyond the scope of this paper to go into detail, but suffice it to say that elements of the following are involved:

- Knowledge and content management
- Process control and workflow capability
- Integration with appropriate transaction systems
- Detailed activity monitoring and analysis
- Continuous optimisation facilities

Like all good technology, a properly implemented sales enablement and operations platform can appear a bit 'magical' from the user perspective.

For the technically minded, take a look at Appendix A, which lays out the architecture of a sales enablement and operations platform offered by Prept, the sponsor of this paper. We have provided this not because we recommend or endorse the solution, but to illustrate the composition and scope of the kind of platform we have outlined.

An important point to note is that the word 'platform' means exactly that – it is not the final solution, but the foundation upon which that solution is built. Professional services from the platform vendor or one of its partners are therefore usually required, but unlike the DIY approach, this doesn't mean a lot of software development. All of the core functions are there, so implementation is mostly about configuring the platform to your needs and connecting it into your environment.

Rich data, deep insights, and continuous optimisation

Any form of automation creates detailed event and flow data, and the solutions we have been discussing are no exception. Logs are written every time a sales rep interacts with the system. These can be harvested and used in your performance modelling and analytics environment to create deep insights and drive continuous optimisation. Whether it's the collateral used, the relative time spent on various activities, or how follow-up takes place after a call, the impact of different behaviours on success or failure can be assessed based on objective and accurate data.

The impact of different behaviours on success or failure can be assessed based on objective and accurate data.

If you work in a regulated industry, the other big benefit of a sales enablement and operations platform is the ease with which compliance can be demonstrated. Activity data provides a clear and unambiguous view of whether the sales person followed the mandatory parts of the sales process, such as making the client aware of disclosures and disclaimers, and capturing the necessary acknowledgements.

The bottom line

CRM systems are often not the best place to start when it comes to front-line sales enablement.

Think differently and use the right solution for the right job.

At the time of writing, it is fashionable in both business and IT circles to talk about digital transformation. In the context of online customer engagement this is often enabled by marketing automation technologies that track and guide the customer as they interact with your website and mobile apps. But digital transformation is equally important when considering how you do things internally, and this includes the way in which your sales teams operate.

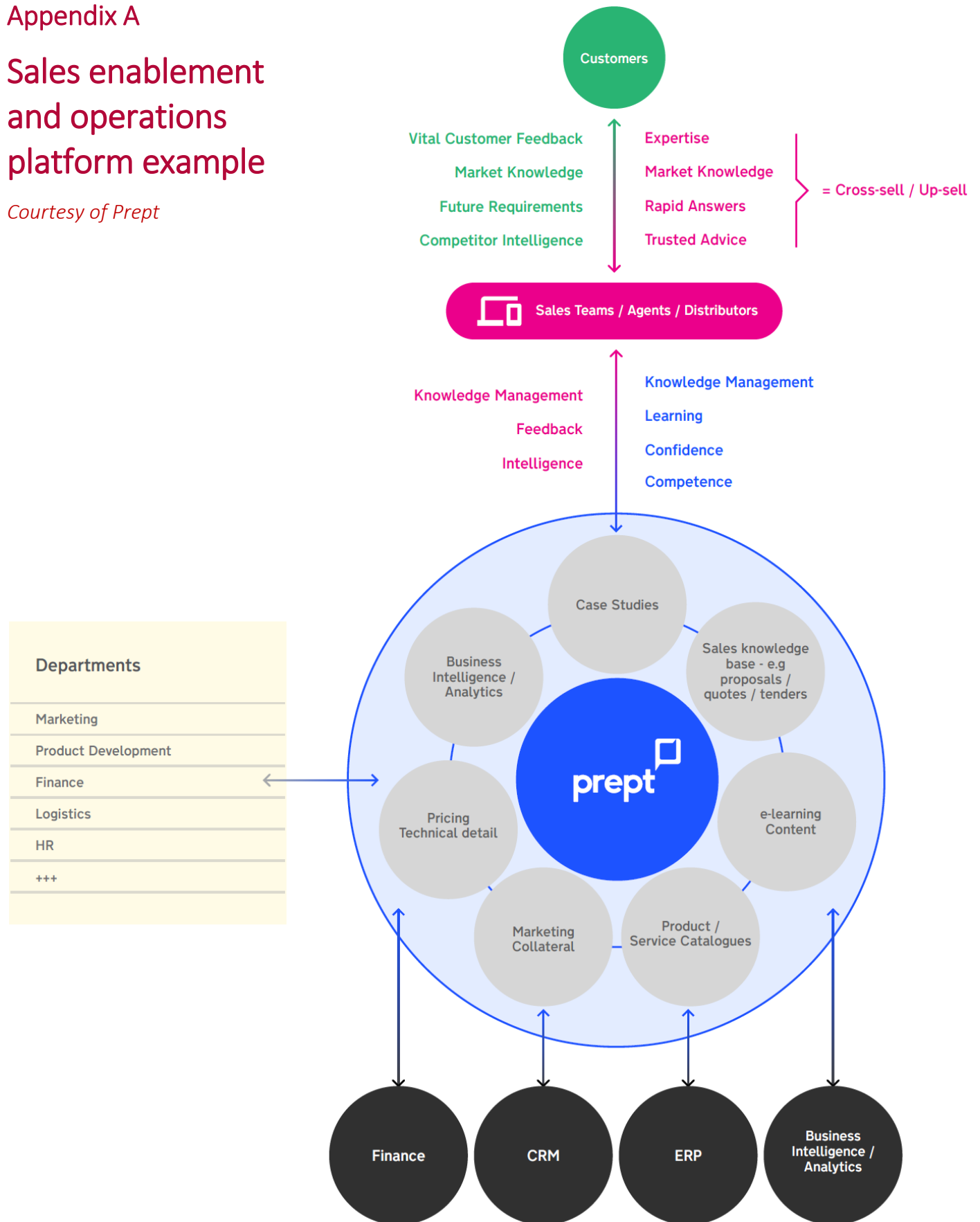
In many respects, a sales enablement and operations platform can be considered as applying the same ideas in a sales force context as you do in relation to online marketing. The principle of using an intelligence-driven approach to automation, assistance and continuous optimisation is very similar, as are the step changes in performance that can be achieved. While CRM systems can deliver significant business benefits in many areas, the reality is that despite supplier claims, they are often not the best place to start when it comes to front-line sales enablement.

With this in mind, we hope our discussion in this paper has helped you to appreciate what can be achieved if you think a little differently and use the right solution for the right job.

Appendix A

Sales enablement and operations platform example

Courtesy of Prept



About Freeform Dynamics

Freeform Dynamics is an IT industry analyst firm. Through our research and insights, we aim to help busy IT and business professionals get up to speed on the latest technology developments, and make better-informed investment decisions.

For more information, and access to our library of free research, please visit www.freeformdynamics.com.

About Prept

Prept provides a set of tools, knowledge and processes that enable a sales team to succeed and then excel. It supports users to increase sales and profit margins by leveraging the power of shared business information and processes.

Prept achieves this through easy to use modular components, helping clients extract the most from their sales resources and providing strategic insight into customer interactions. The platform supports those engaged with clients and prospects by guiding and prompting suitable responses and suggestions, to clients' requirements. Appropriate options are offered and selected based on acquired collective experience and intelligence, reducing the learning curve and making staff more effective and productive in less time.

For more information, please visit www.prept.ai.

Terms of Use

This document is Copyright 2016 Freeform Dynamics Ltd. It may be freely duplicated and distributed in its entirety on an individual one to one basis, either electronically or in hard copy form. It may not, however, be disassembled or modified in any way as part of the duplication process. Hosting of the entire report for download and/or mass distribution by any means is prohibited unless express permission is obtained from Freeform Dynamics Ltd or Prept. The contents contained herein are provided for your general information and use only. Freeform Dynamics Ltd provides no warranty or guarantee as to the suitability of this document for any particular purpose.