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Salesforce.com: A Punch List for Your Sales VPs After Rollout

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You were one of the business-side executives who championed a new CRM system for the company. Now you've won the battle. Your company's new CRM system is turned on. What should your initial priorities be as a sales team?

Where will your sales team need to spend the most time? How will you measure success? Where will the quick wins come from? Here are some guidelines for sales VPs for the first few months of Salesforce.com usage. Much of this article applies to any modern CRM system, though we've focused on the specifics of Salesforce.com.

1. Value usage over raw functionality

The fanciest features in the world won't make any difference to your business if they're based on garbage data. You want to start the virtuous cycle early: more users leads to more data, leading to better credibility, leading to increased business value, leading to more usage. So make it really easy for sales users to begin using SFDC: provide easy on-ramps rather than trying to ram big changes down the organization's throat.

SFDC's applications are developed using agile methodologies, and I recommend that customers use an incremental approach for system extension and deployment. I recommend on-boarding new user groups every few weeks, and adding complexity only when (1) your system's data is sufficiently complete and credible to support it, and (2) the new feature will provide a meaningful benefit to the users.

2. Show that YOU use and value the system

Since your first CRM objective is to make sure that users adopt the system, communicate verbally and through behavior that you will be relying on the system to make management decisions—and that you expect people at every level to do the same. A key success factor for your SFDC implementation will be the way employees perceive how you use the system and value its data. If they sense you don't care about it or don't believe in it, neither will they.

Make SFDC your preferred medium for communication about prospects, opportunities, and customers, so that the system becomes an information kiosk for all things relevant to deals in progress. Make it clear that it's a real pain for you to look outside of SFDC for information about people, accounts, or deals. You'll be using the system to drive the boat. It's how you'll do account reviews, pre-call briefings, and the weekly forecast meeting. Inform reps that you'll give higher priority to requests made via SFDC than those that come through e-mails and voicemails.



E-mails and voicemails are fine for *alerting* people to change, but all the substantive information should be in the deal "war room" that is provided by SFDC. If users complain, you might buy them a new toy: a new iPhone or Blackberry and Salesforce's Mobile edition, so that they have all the information they need at their fingertips.

3. Read my lips: No new taxes

If your reps view the system as merely an administrative burden or a tool for you but not for them, they will view the CRM system as nothing more than a tax.

Before you ask sales reps to enter any new data (which they'll view as an overly taxing burden and an intrusion), figure out what you would do if you already had the report based on those data in front of you. Which decision would you actually make differently? If you're "just curious," don't ask the reps to enter anything new.

Always give the reps something that is intrinsically valuable—something that saves them time on the job or makes them look smarter—before you ask them to put additional effort into the system. If sales folks don't get anything directly in return, usage of the system will wither and the quality of the data in the system will decline.

Through automation and better collaboration, SFDC can be a liberation from data reentry and forgotten action items. Tell the salespeople to use the Outlook or Notes connector to their email client, so there's less to type. Consider using InvisibleCRM if your sales reps live in Outlook. If you have really ornery reps, hire a temporary administrator (with a dedicated phone line and voicemail box) to do the reps' data entry for the first few months. Remove all excuses for not using the system.

4. Don't use CRM to spy on the reps

Salesforce is not a spying machine. It's not a micromanagement tool. Do not use it that way, and make it clear to your sales managers that you won't support their using it that way either.

Instead, communicate that SFDC is there to enable individual reps to manage their time more effectively. Field reps should see themselves as business people who have been given an exclusive franchise to sell your company's product in a territory. As CEOs of their own businesses, they need to manage their time wisely above all else. SFDC will be the way they access the resources that they need to close deals. It will be optimized for them to increase their leverage, so they avoid the duds and close more real deals.

5. Straighten out the process details

Implementing any SFA system will expose weak links in your sales and marketing processes. So members of your team will need to iron out the inconsistencies that have crept in to such areas as:

--Semantics regarding "what's a lead?" "what are our qualifying questions?" "what are our sales stages, and what are the trigger events that move a deal along?"

--Territory definitions, including overlays, national accounts, and partner territories. You need to have really clear rules of engagement regarding partner lead routing, opportunity management, splits, and double-comping.

--Price lists and SKUs, which can be a surprising mess even in small companies. You need to systematize the way you talk about, sell, and price your products.

Don't leave these tasks to marketing -- get someone from your sales team involved.

6. Keep playing like a champion

The Sales VP may not be the formal "owner" of SFDC, but you must be the driver. To really have control, this means you need a budget for consultants, expansion licenses, and add-on products. But there's another side of your championship role: boosterism.

A sales VP's decisions, personal behavior, and word choices make a big difference here. Your team knows you, and they can read what you think from your tone of voice and facial expressions. A few of

the wrong words carelessly thrown around when you're stressed out at the end of the quarter can set adoption back by months.

You must act consistently about relying on SFDC's data and reports to run management meetings. Get a dashboard named after you, and have that dashboard appear on the home screen of the sales team.

Create a sequence of milestones for meetings that will depend on data and reports. For example, if the system will initially go live in January, you might ask that all lead reports at executive staff be based on the system by March, that all opportunity lists be driven off the system by April, and that all forecasting and pipeline reports be based only on SFDC data by May.

7. Figure out where the quick wins will be

The first quick wins for sales will come from things that didn't fall through the cracks. A customer follow-up that wasn't forgotten. A task that was properly handed off. A forecast that didn't blow up. A deal that was saved.

In the long run, you'll get collaboration, management by exception, and systematic improvements to sales, marketing, and customer service productivity.

But don't set expectations there yet. In the short run, it'll be crises avoided and a few easier deal-wins. So watch for the signs of "whew, that was a close one."

8. Publicize the good news

Early on, much of SFDC's credibility will depend on the experience of users. Word needs to get around about how the system helped Sally close a deal faster or prevented Joe from forgetting a customer request. These stories are an important part of system folklore, and they need to be encouraged.

Identify a few situations where something great happened as a consequence of using the system and "promote" them. For example, if a customer support rep is able to convert an irate customer into a happy one thanks to SFDC, send a congratulatory e-mail across the sales organization highlighting the "win." These emails need to be written subtly—avoid sounding like crass boosterism or a bad newsletter, because, well, sales reps know a bad pitch when they hear it.

The most effective e-mails will be about a "sales hero," a rep who closed a bigger deal or did a better upsell, with a "secret to success" that most reps don't know about. News of their special technique (involving, of course, SFDC) needs to come directly from that rep—not from management—almost in the form of bragging. All of this subterfuge may seem contrived, but sales reps really listen to other sales reps who look more successful than they are.

David Taber is the author of the new Prentice Hall book, "[Salesforce.com Secrets of Success](#)" and is the CEO of [SalesLogistix](#), a certified Salesforce.com consultancy focused on business process improvement through use of CRM systems. SalesLogistix clients are in North America, Europe, Israel, and India, and David has over 25 years experience in high tech, including 10 years at the VP level or above.

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