

# PEO Network Articles Archive 1997 (January thru June)

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## Getting Your “ACT!” Together

*Top PEO producers need to keep their business lives organized to stay on top. One of the hottest programs on the market for this is ACT! from Symantec.*

As the nominees pour in for the “Selection Criteria” article, one characteristic of top PEO producers is resoundingly clear- **they are organized**. At least 90 percent of the nominees utilize a contact manager software program and 85 percent of those utilize ACT! by Symantec. In addition, six months ago, I polled 75 PEO sales people and 95 percent of those that used a computer program also used ACT!. When questioned directly, those using Goldmine or Maximizer did so because it was what their company offered. Some also mentioned that they would really prefer ACT!, while others noted that they had no exposure to ACT!.

Consultant Rick Duris of Business Technology Group says, “I have implemented all three programs, ACT! is geared for the sales person and the other two provide better statistical and tracking information for Sales Management.” ACT!’s set-up is such that it offers all the features of the other two programs combined.

### **Why Automate the Sales Process?**

In today’s information age, you can’t afford not to get your sales force on computer. This is a lengthy sales process and follow-up is paramount. The average PEO sale encompasses two pre-approach letters, two pre-appointment phone calls, four on-site meetings, two proposals and five follow-up phone calls over a minimum four-month time frame. A productive sales representative should have at least 27 qualified prospects in the sales pipeline at any given time. Simple multiplication will give you a clue as to why things fall through the cracks.

Certified ACT! Consultant Alan Kelley says, “ACT! is great for relationship selling because today’s business owners are very busy, and if you mail them a huge marketing packet, they will never read it. However, if you mail several pre-approach letters, fax a recent article about you or your industry, e-mail something interesting about their company or industry.... They feel like they know you when you call to set up the initial interview.”

### **From a Sales Perspective**

Sales people often call me complaining that the PEO they represent won’t purchase laptops for the sales force and that there is only one clunky old 386 in the office for 10 sales people to share. My advice is, “Sell your car, buy a laptop!” Think of yourself as a self-employed business owner because, in essence, you are. Invest in yourself and watch your productivity rise. As a commissioned sales representative, your raise becomes effective when you do. Imagine inputting a contact one time, and with the press of a button or two, the following functions can be performed: a pre-approach letter and envelope zip out of the printer, the follow-up phone call is logged into your activity for next week, the phone dialer automatically dials the prospect, a fax zips across the wires with a confirmation of your sales appointment at midnight while you are sleeping, the information gathered at the initial meeting is downloaded and will produce a proposal by transferring information to an Excel spreadsheet, final changes are made at the closing meeting and printed out onsite, information is transferred to the orientation team and your boss knows about the whole process with your automatic sales call report!

### **From a Management Perspective**

Successful PEOs have three common characteristics: first, a Shared Vision (vs. a Mission Statement with dust on it), equity spread among key employees, and a high level of computer literacy. Automating your sales force can be very expensive initially because of the capital investments as well as software and training. You won’t begin to see a return on the investment for more than a year, but, like the pebble in the pond, the positive effects ripple forward for years. Imagine having a computerized record of every qualified prospect that was called on since you started in business? Statistics show that people don’t buy until they have seen something three times. What would happen to sales productivity if every new sales representative was handed a laptop pre-loaded with 500 prospects to call on who had already heard about the concept once or twice?

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## Getting Started

The following is a scenario of a PEO that is automating their sales division. PEO Services, Inc. is a PEO with corporate headquarters located in the Southeast, has 5,000 worksite employees, two regional offices and four remote sales offices. All 20 sales representatives report to the Vice President of Sales at the corporate office.

**Step One:** The first and most important step in any process is to determine the outcome. In this case, the company's ultimate outcome is to go public within a two-year time frame and the sub-outcome of this sales automation process is two-fold: First, there needs to be a more accurate tracking of the sales process. Also, the sales team needs to be upgraded to be of a more consultative, trusted business advisor genre.

**Step Two:** research at least three options for sales automation before determining a budget. Due to time and budget constraints, PEO Services has determined to go with a shelf product versus a custom package. They decided on ACT! 3.0 by Symantec and searched the Internet Website to find a Certified ACT! Consultant.

**Step Three:** Immediate action is imperative any time you set a goal. Therefore, PEO Services purchased a 40-user network version of ACT! 3.0, WinFax PRO 7.5, LapLink and 20 laptop computers. The consultant integrated the whole project with the existing computer systems.

**Step Four:** Integration of this project into the corporate culture was accomplished by extensive training of the sales division and communication with the rest of the company. In this case study, PEO Services' marketing department created a Website and downloaded leads to the sales representatives during the weekly "synchronization" process. They marketed their Website through D&B MarketPlace contacts.

**Shortcuts:** For local sales people who have access to desktop computers at the office, you can purchase Hewlett Packard Palmtops for about \$1,000. A successful laptop option is to have sales people purchase the computers through payroll deduction. This is a win/win scenario because you can purchase top quality and get bulk purchasing discounts plus the sales people will take better care of the equipment and be more likely to use it. Lastly, ACT! and EXCEL training can be done at the local computer store; however, the downside is that it is not customized training specific to your industry.

## Closing Thoughts

Automating your sales division alone will not guarantee success; automation is just a step in the process. A common phrase that we have all heard is that we are "fragmented" as an industry. What does that mean? The dictionary says, "disorganized or disunited." Could that be why, after 20 years, we only have a three percent market penetration? Hmmmm.....something to think about!

If you are contemplating an automation implementation or upgrade, first determine your target market or markets. Make sure they are in alignment with your mission statement, strategic plan, competitive advantage, HR-vendor-sales competencies and financial plan. Utilize the automation process as a tool to build relationships with your target market and as a feedback tool to determine if you and your people are on the right track. More on target marketing in a future issue of *The ProEmp Journal!*

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