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Automating Your Sales Force

New robots can sell 2000 lives per year, just kidding!

In recent years, we've seen a great deal of attention paid to the efficiency and productivity of "back office" functions such as PEO specific payroll software, HR and benefits management. Now, PEOs are starting to realize that they must rethink and redesign the processes of the "front office" – sales, marketing and service – if they are to achieve revenue gains. Indeed, top PEOs are starting to use new knowledge-intensive technologies to reach out to their customers and develop powerful, lasting relationships.

Automating your sales force means that technology can be used to speed up previously inefficient operations. The Internet and related technology can automate functions such as the recruiting, screening, contact management, proposal and sales process. In researching this topic, the array of products available is mind-boggling. There are also firms available to customize these solutions for your particular situation.

While speaking to PEOs regarding this topic it seems that contact management and getting the proposal process on the web were of utmost importance. An estimated 60% of PEOs currently provide no automation tools to their sales people. That, of course, encompasses the many small PEOs with less than 5 sales representatives.

Let's take a look at what is currently being utilized by PEOs as well as what is available...

Essentials For Sales People

The typical sales process encompasses two pre-approach letters, two pre-appointment phone calls, four on-site meetings two proposals and five follow-up phone calls over a 90 day period. How many prospects are you expected to keep in the pipeline? Simple multiplication will tell you that this process needs automation. Some PEOs prefer to have sales people come in to the office and work from a PC, while others give their sales people the freedom of a laptop. A few larger PEOs are utilizing the intranet for contact management, on-line presentations, proposal process and training.

Essentials for Sales Management

Automation starts from the recruiting process for PEO sales managers, through training and into sales management. Résumé's for potential candidates are now easily accessible through the Internet. Personality profiles are now available via the Internet so that you can test people remotely.

It is essential to purchase the best CRM system that your budget will allow because management needs to have access to sales data. Knowing what's in the pipeline is crucial for forecasting, budgeting and planning.

For high tech training at it's finest, check out <http://www.viewinfo.net/crm/> and play the March 14th Webinar – "From Lead to Loyalty". Not only is this a phenomenal example of how to utilize the Internet as a training tool, the content is about customer relationship management and how Staff Leasing is utilizing Oracle for CRM.

Large PEOs

For the purposes of this article, we will define a large PEO as one having more than 50 captive, internal sales representatives. These companies are either utilizing or contemplating full front office Customer Relationship Management products such as Oracle, Siebel Systems or Trilogy to name a few.

Contact Management systems such as ACT! 2000 give you a rolodex and calendar. The Customer Relationship Management, CRM, products are much more involved and carry the process through the sales and into on-going service. Some of the higher end products even interface with the back office functions.

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Mid-Sized PEOs

Companies with more than 5 but less than 50 sales people utilize a wide array of programs. The most commonly utilized is Goldmine due to its networking capability and sales management reports. Telemagic, Mazimizer and ACT! 2000 are also utilized.

There are some competitors offering web based solutions that have generated interest among PEOs, especially those with sales people in different geographic regions. They include SalesLogix.net, UpShot and salesforce.com. Some of them come in an ASP version which cuts down headaches for your already stretched IT staff.

Small PEOs

The best time to implement sales force automation is during the start up phase of a PEO. Management has to create the corporate culture where there is a desire to capture the data. Sales people need to be trained on the tools available and the expectations have to be set from the beginning.

For companies with less than 5 sales people, the ACT! 2000 program is very popular. Sales people love ACT because of its "out of the box" readiness and usability. Managers tend to complain about lack of sales reporting.

Look Before You Leap

Some PEOs have made attempts to implement sales force automation but have failed. In the past, contact management programs were used to control and monitor the sales people, rather than assist them in the sales process. Today's programs are easier to use and help the sales person become more productive.

Most sales people resist any attempt at automation: they still see it as management wanting to control and monitor. There are several ways to overcome their resistance. The system must be easy to use with intuitive screen layouts that make the system immediately useable and valuable to their needs. Sales people do not have the time or inclination to read manuals (or to even press F1 for help), and get frustrated with poorly designed systems. In addition to ease of use, the system must have depth of features and flexibility. Since sales people are usually very creative and have the ability to see ways of doing things better, a system without depth and flexibility will eventually stop a sales person from getting to the level of performance that he or she may want. With a well-designed system, who knows what they might be able to do.

Final word of caution, a barrier to any technology implementation is the often-overworked IT department. It may be advisable to utilize an outside firm to implement your chosen sales force automation solution.