Helping Remote Sales Teams Increase Sales

Freeing Up Administrative Burdens and Using the time for Strategic Sales Efforts

"…Our top level sales managers spent almost 20% of their time administering information for their remote sales team. Now, these very effective and experienced people can spend that time developing strategic sales strategies and our remote sales teams have much better information…"
Sales Executive

Situation

The customer had over twenty field sales teams, scattered across the USA, working with a diversified array of clients. To manage the sales teams and provide them with the best information to support their selling efforts, the customer manually consolidated information from disparate sources, including dozens of spreadsheets that were difficult to maintain.

Unfortunately, sales management had to spend at least four days a month, almost 20% of their time in administrative efforts. It also meant finding the time to come out of the field and into the office to do the work so it wasn't always completed in a timely manner.

Information that finally reached the field sales force was often late and incomplete so they struggled to learn what their customers' buying patterns were. They had to manually gather and sort whatever data they had. Many times they went on sales calls with little or no information. They wanted to offer special incentives to the customer with supplies, services and special deals, but without the purchase history they found it difficult to build the value of the sale.

The customer was missing new market opportunities because they had little time to evaluate new market potential. Cost versus benefit analysis of the incentives programs were left unevaluated. Sales management needed to improve visibility so management could develop a better sales strategy to increase revenue.

The customer needed a faster and more effective way to collect, analyze, report, and disseminate sales information to corporate sales management and the remote sales team so they could apply the time to more productive activities and the sales force could have the tools they needed to increase sales.

User Concerns

The customer knew that there were several risk factors:

- Distraction of the managers from important business issues if detailed scripting of IT personnel were to be required

- Disruption of up and downstream business processes if unintended consequences were to occur

- Dissipation of scarce budget resources if the improvements were to not be captured

The customer wanted to automate the process but had great anxiety about accomplishing this without disruption to the entire sales team. The business users knew what needed improvement, but, they required IT support to implement the process improvements. Internal IT departments are very talented in managing the corporate data and associated platforms; however, they are often too busy to become familiar with each departmental process and the associated business rules. Therefore, departmental managers must spend valuable time scripting each step to avoid the risk factors listed above.

Companies with remote sales teams must spend valuable time assembling admistrative data to support their remote sales teams. Companies need to find a way to reduce the admistrative effort and apply the time to achieving a competitive selling advantage while improving the quality and timeliness of the information the sales force needs.

Solution

The customer brought in AccessIG, Inc., a Microsoft Certified Partner, as a member of the team to help mitigate the risks and to accelerate the capturing of the benefits. Because AccessIG had extensive experience the customer did not have to script each step. AccessIG not only demonstrated a quick understanding of the business processes, but also those processes that would be affected up and down stream. And, based on their extensive experience, they brought valuable "best practices" experience that they customer could draw upon. As a result, the customer gains faster benefits at a lower cost due to:

- the acceleration of the process improvements/prototyping phase
- the acceleration of the identification of the cost/benefit
- the acceleration of the identification of avoidable risk

AccessIG used SQL Server 2000, SQL Reporting Services, SQL Server Integration Services, and a BI-DataMall ® to replace the manual prepared spreadsheets.

AccessIG first developed a report using SQL Reporting Services so the customer could participate in the Imagineering process, which greatly reduced the time the customer had to spend to participate and reduced the risk of commercial and professional failure. Once the customer saw the first report they were able to quickly imagine what they wanted and accurately communicate the needs to AccessIG.

AccessIG set up automatic data extractions to lift the sales information from the existing ERP system into the BI-DataMall® removing the effort to rekey the information and at the same time, eliminating data entry errors and ensuring valid data. Using SQL Reporting Services, automated reports were generated on a schedule to disseminate sales information to the remote sales force and to provide corporate management with sales and financial data. AccessIG also used Excel Direct Connect (SQL Server) so those managers who like to work in Excel could continue to do so. SQL Reporting Services also allowed sales management to distribute the reports in various formats, including PDF, Excel, comma delimited, etc., depending on who was receiving the information

The solution was first tested at corporate to exercise the solution in order to fine tune the application for maximum ease of use and benefit for the users. Suggestions were evaluated and either eliminated, implemented or considered for future implementation. Now the sales force had the information they needed to build the value of each sale and sales management used the time they saved to focus on strategic selling efforts.

Benefits

- Reduced sales administrative efforts from 4 days per month to 15 minutes per month.
- 20% of their time was freed up to pursue strategic selling efforts
- Remote sales teams received more accurate information, earlier allowing faster action in capturing opportunities
- Management has more time to devote to:
    - Meeting with the most important customers
    - Developing new sales strategies
    - Analyzing sales by products, industries, salespersons and other trends
- Gathering and completing the information has been pushed down from corporate to the automated systems
- Users were able to continue using the desktop tools with which they were already familiar ; i.e., Microsoft Office
- The process was completed without any disruption to the sales force

Benefits Update

After the system had been in use for over 9 months, the customer reported these additional benefits that validated the methodology and solution:

- Using the improved sales performance visibility, generated by the new solution, the customer was able reach new heights of effectiveness with their sales promotion activities by focusing on the most promising territories, products, and customers
- More accurate promotions allowed customer to maximize results while minimizing resource expenditures
- Sales teams had better information and more time to develop the relationships they needed to improve the chances for capturing more business resulting in better brand awareness.
- Customer increased the winning of additional business both within their existing customer base, as well as new accounts
- Established a partnership with AccessIG to continue to leverage new technologies without having the cost of keeping full Microsoft expertise in house