



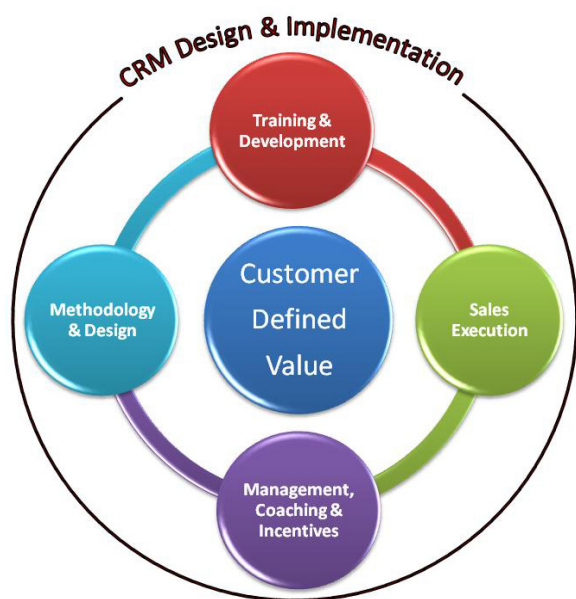
# CRM AND SALES EFFECTIVENESS: A FRAMEWORK FOR SUSTAINABILITY

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*Few would disagree that technology can provide significant benefit in driving sales efficiency and effectiveness. Why then do CRM implementations so often fail to deliver the business value upon which they were justified?*

*Too often, a gap exists between the complex interrelated factors that drive sales effectiveness and the CRM platform's design and implementation. Enabling, executing and coaching an effective sales methodology requires that CRM alignment is integral to the design, development and deployment of any sales transformation initiative. Divergence or blind-spots in CRM capability versus sales methodology design are likely to result in unseen execution gaps.*

*This paper defines four key design considerations relevant to developing and maintaining CRM's alignment within a sales effectiveness framework.*



### 1. Sales Process vs. CRM: First Things First

**M**any complex interrelated factors influence sales effectiveness. One cornerstone is a disciplined sales process uniquely customized for the product, services, competitive and buying environments into which one is selling.

Most would acknowledge that leading a sales effectiveness improvement initiative with a CRM deployment - or designing an initiative around the capabilities of a CRM platform - will likely result in a poor outcome.

Despite such awareness, effectiveness initiatives can be derailed by impatience for quick results. How better to show quick results than from out-of-the-box CRM management insight graphs? Beware! CRM can easily distract and misdirect effectiveness design teams – particularly if those teams lack experience in defining and integrating the complex, interrelated components of a comprehensive sales methodology.

In the early design phase of a sales effectiveness initiative, it is critical to prevent a specific CRM tool’s features and potential capabilities from driving or exerting undue influence on the initiative’s objectives.

### 2. Enabling the Sales Effectiveness Ecosystem

**A** robust, customizable CRM platform is not a discrete component of a sales methodology. Rather it should be the operational foundation upon which every key process is executed and every dimension of sales effectiveness is measured.

Dave Stein, CEO, ES Research Group Inc, summarizes the many dimensions of effective sales methodologies to include: *“processes, tools, messaging, infrastructure, compensation and incentive approaches, measurement systems, learning curriculum, reinforcement mechanisms, delivery systems, technology-enabled learning platforms, and hiring methodologies.”*<sup>1</sup>

Encompassing such a broad array of business disciplines, it is little wonder that “sales effectiveness” is elusive and often perceived as intangible. Yet CRM can and should be the common tool that binds every dimension within the “sales effectiveness ecosystem.”

Integration of the multiple disciplines comprising an effective sales methodology can well be accomplished within today’s agile business process technology architectures. Perhaps the integrated vision could be described as a “Sales Effectiveness Platform” rather than “CRM” due to the historical perception of CRM as inflexible, IT-driven legacy applications that burdened everyone in the customer value creation chain.

Integrating a comprehensive sales methodology on a CRM platform implies a requirement for ongoing customization. Yet one-size-fits-all, off-the-shelf CRM and sales methodology components exist in the market.

- Can off-the-shelf solutions comprehensively support an enterprise’s unique sales, account management and business processes?
- Do off-the-shelf solutions truly enable the competitive differentiation required in today’s complex selling environments?

<sup>1</sup> Stein, D. (2010). Retrieved from: <http://davesteinsblog.esresearch.com/2010/06/08>



### 3. Balanced Simplicity

Successful CRM user adoption is directly related to simplicity/ease-of-use. Conversely, a CRM platform that doesn't provide value to its users will be ignored or, if mandated, may be manipulated by users who fabricate or provide only the minimum required input, thereby resulting in sales effectiveness blind-spots.

The problem is that complex selling is - obviously - "complex" and thus a comprehensive sales methodology is required to align and guide its many components. A challenge arises when attempting to balance two competing tensions: simplicity versus comprehensiveness. CRM is never easy enough to appease busy sales reps, while at the same time robust enough to enable and measure every quantifiable dimension of a comprehensive sales methodology.

Balanced simplicity can be maximized, but never achieved. Keys for optimizing the balance include:

- Actively engaging cross-functional teams in sales methodology design initiatives
- Prototyping and piloting sales methodology components on the CRM platform with real-time input from cross-functional teams
- Incorporating methodology training and help capabilities within the CRM platform itself
- Planning for and enabling the evolution of the CRM platform to continually rebalance to optimize business objectives

### 4. Iterative Flexibility

Acknowledging the necessity of CRM evolution and continual rebalancing implies that a serial or "waterfall" process for CRM design and deployment is not practical. The sales effectiveness ecosystem is far too complex and dynamic. Rather, an iterative development and deployment approach will improve both short-term results and long-term effectiveness from CRM initiatives.

Equally important is the awareness that the benefits of iterative approaches are every bit as necessary in the operational phase as they were in the design phase.

In an agile, iterative CRM deployment environment, those familiar only with maintenance phase support of legacy applications may perceive that sales effectiveness initiatives and CRM are unstable or perpetually immature.

On the contrary, only when iterative flexibility exists will CRM be able to accommodate the frequent adjustments required to continually optimize sales effectiveness due to changes in any component of the complex sales effectiveness ecosystem.

#### CRM Top-5 Self-Check:



- Aligns with and supports sales process design
- Integrates every dimension of a comprehensive, customized sales methodology
- Iteratively designed, prototyped, piloted and put into production with input and buy-in from constituent users, coaches and managers
- Supported by simple change processes that enable continual evolution and encourage frequent updates
- Led by sales/business functions; not IT

**About Performance Methods, Inc:**

Based in Atlanta, GA, PMI provides consulting and training services to assist clients in the design, development and deployment of customer engagement best practices. PMI's unique approach provides clients with customized and integrated solutions consisting of sales processes, best practices and consultative selling skills. PMI has been selected by many of the world's leading corporations as their sales best practices partner and has been widely recognized for the innovation, effectiveness and the strength of its contemporary suite of customized sales performance solutions. PMI creates worldwide client value and coverage through its global partnership with Mercuri International, the world's largest sales training and development consultancy, and is an active participant and sponsor in the Strategic Account Management Association (SAMA), the world's largest non-profit community of sales best practices. For additional information on Performance Methods, please visit [www.performancemethods.com](http://www.performancemethods.com).

**About the Author:**

Joe Vance leads PMI's Sales Enablement/CRM Practice. Joe's background includes a 27-year career in the Technology and Human Capital sectors where he led Consulting, Outsourced Services, Account Management and Sales teams in developing and delivering successful client engagements. Joe's experience includes leading and implementing a cross Business Unit Sales and Strategic Account Management business process and CRM transformation initiative for the world's leading provider of human capital solutions.

Performance Methods, Inc.

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