Issue #3 - May 3, 2018

Go With the Flow Newsletter

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Editor-in-Chief
Linda Kronberg

A Message from the Editor-in-Chief, Linda Kronberg

It's hard to believe that another week has passed and we are already publishing our third issue of the BPE *Go With the Flow* Salesforce Newsletter. The goal for our newsletter is to communicate useful information related to our transition to Salesforce as well as Burt Process Equipment's business processes.

Additionally, the Solution Pioneers Team members are contributing weekly articles, which provide a combination of personal management tools and Salesforce-specific process updates. Jonathan Dearborne has contributed a wonderful article this week about things you can do on your own to improve productivity especially when learning a new system such as Salesforce.

We also have BPE managers contributing articles highlighting proven ways in which BPE can sustain increased sales by focusing on increased customer attention and support. Dave Carson has provided a recap of Burt Process Equipment's Account Definition & Classification evolution and significance while Stacey Smart has contributed an article focused on the importance of follow-up to making a sale.

Employee photos in Salesforce

As part of BPE's initial Salesforce set-up, we have loaded all of the employee photos from the Company Directory into Salesforce.

For those employees who have not signed a waiver for their photo to be used (as well as temporary employees), we have excluded the photos from Salesforce.

We are mandating that business professional images be used and we prefer to use employee photos taken by Bill Elliott as he is the official BPE photographer and there are no copyright issues with using the photos that Bill takes.

We are requesting that Salesforce Users do not change their photos as displayed in Salesforce on their own and we would like anyone who has concerns regarding his or her Salesforce photo to contact the Salesforce Team (Stacey, Linda and Miles).

Did you know...Salesforce can be used to track all kinds of key metrics...

AND SO MUCH MORE......

Motto — **If it's not in *Salesforce*, it doesn't exist!**

Salesforce tidbits brought to you by the **Solution Pioneers Team**

Your Advocates...

The Solution Pioneers Team

Caitlyn Allgaier
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Jonathan Dearborne
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Jennifer Harriss
Inside Sales

Kathy Kelsey
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Editor in Chief Newsletter

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Facilitator

Personal Productivity
and How Salesforce will Help

Contributed by...Jonathan Dearborne

Do you find yourself constantly “swamped” in day-to-day work? You are not the only one. I am sure I’m not speaking for just myself when I say that the day-to-day hustle and bustle can tend to be overwhelming at times and can leave you feeling like you are in a hole that you can’t crawl out of. However, you can control it! Below are a few tips and tricks you can use to make the most of your time.

First off, don’t let your day run you. Rather than trying to tackle everything at once, make a list of no more than 3 tasks at a time to accomplish and focus on the hardest one first. Having a “plan of attack” for the day will provide you a sense of accomplishment and relief as you check off the items on this list as you progress through your day. Keep in mind that Salesforce is a great tool to use for this!

Second, manage your energy instead of your time. The workplace schedule can take a toll on us and has a negative impact on our physical, mental and emotional well-being. By taking care of yourself (better sleeping habits, better nutrition) we can increase our energy levels and improve not only our performance but also our personal well-being.

My final tip is focus, focus, focus! One of the most crucial things we need to do to remain productive is stay focused on the tasks ahead. All throughout the day, we are bombarded with multiple distractions (phone calls, social media, side conversations with co-workers, etc) 95% of people say they have trouble focusing throughout the day, and there are some easy ways we can ensure that we remain as focused as possible. We can make sure we have a clean desk (clutter can provide us with a sense of confusion and dis-orientation), turn off all devices we do not need to use for our day to day tasks, keep our to do lists short, and sometimes simply putting on a pair of headphones and listening to some music can help the brain focus on one thing at a time and can assist us closing all eternal distractions.

All in all, everyone has their own ways of staying on task but it never hurts to try new things and add more tools to your repertoire. Ultimately if it helps you focus and stay productive than that is what is important. Also keep in mind that as we move into using Salesforce, these exact tips and tools will be extremely helpful to new Salesforce users and will allow us to stay on task and to remain focused on learning and using the new system.

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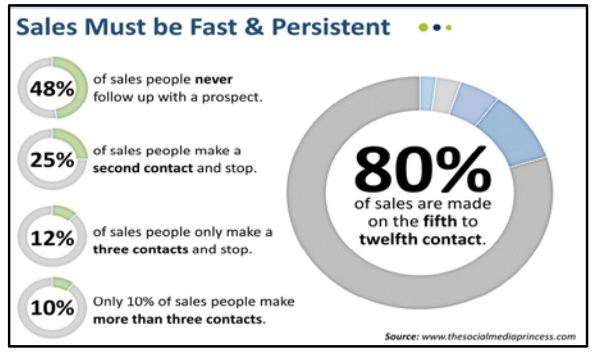
Follow-Up is the Key to Making the Sale

Contributed by...Stacey Smart



1) **Ask for guidance on the best way to follow up with them while adding value without being annoying:**
    a. Focus on adding value, is there specific information that might interest them about the industry, their role and your solution. Do your research.
    b. Document your research information and enter it into Salesforce by using one of the following:
        i. Additional Information
        ii. Notes & Attachments
        iii. Product Opportunity Specifications

2) **Ask them what their preferred form of communication is?**
    a. If they say email, ask how your email can stand out as they are probably getting hundreds of emails per day? Is there something that you can add to the subject line to call attention to the email
    b. Ask for their normal response time: "*What should I expect for a response timeline for emails that I send to you. I will commit that I will respond to you within 24 hours of any email that I send you, is it realistic to ask the same of you?*"
    c. Log the activity that you used for the above communication into Salesforce, by choosing:
        i. "Log a Call"
        ii. "Send Letter"
        iii. "Other"
            1. In the Comment Section add the information that you received from above. This will provide you with information for your next contact point.

3) **Make sure you always end each conversation with a clearly defined next step**
    a. Add this as a task in Salesforce
    b. Include the Due Date and the time you would like to receive the Reminder

4) **Send a summary email of your conversation, what you talked about and next steps.**
    a. This allows you to summarize that you heard their needs
    b. Holds your prospect accountable for what they told you in a professional way
    c. Send the email via Salesforce and request a confirmation – emails will be logged in your Salesforce Activity

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Account Definitions & Classifications

Contributed by...Dave Carson

Account definition and classification has been a proven strategy for sales management for decades. Applied correctly, a sales individual will be positioned better to manage his or her territory. The benefits include increased time management, focused geographical account development and ultimately an increase in proactive sales activity. All of which should position us to increase sales and by promoting more meaningful use of your time. That being said, time is our greatest non-renewable resource, so spend it wisely!

The account definition & classification was originally launched at Burt Process in 2008 along with a rotating calendar. The activity was heavily manual and unsustainable without the uses of technology. Today these decades old philosophies are a common cornerstone for customer relationship management (CRM) systems.

ABCD Classification

A - Premium (High Profit/ Revenues)	**B – Premium (High Profit/Revenues)**
Sales Handling: • Supported by Inside and Outside Sales • Key and Target Key Accounts Assigned w/ Planned Account Development (Inside/Outside) • Future activity always scheduled in Sales Force • Must have a physical touch e-mail/phone/visit bi-monthly at min.) • Account Visit (Outside) • Opportunities Followed (Inside/Outside) • Pricing determined by pricing matrix or special negotiation • Contacts connected via Linked-In (Outside/Inside) • Targeted Marketing • Receives personal follow up upon discretion • Receives General and Targeted Campaign E-mails	Sales Handling: • Supported primarily by Inside Sales • Key Accounts Assigned (Inside Sales) with/ Planned Account Development (Inside) • Future activity always scheduled in Sales Force (Must have a physical touch e-mail/phone/visit quarterly at min.) (• Account Visits as needed (Outside) • Opportunities Followed (Inside) • Pricing determined by pricing matrix or special negotiation • Contacts connected via Linked-In (Inside) • Tageted Marketing • Receives personal follow up upon discretion • Receives General and Targeted Campaign E-mails
C – Low Profit, High Revenue Description: Low potential. No opportunity to produce significant growth. Sales Handling: • Opportunities followed (Inside Sales) • Line Card Provided with initial quote • Pricing determined by price matrix • Quote Follow Up by CS or Automation • Data collected for future marketing • Account Retention Handling (Customer Service).	**D – Low Profit, Low Revenue** Description: No Potential. No Opportunity to produce significant growth. Sales Handling: • Data collected for future marketing • Account Retention Handling (Customer Service) • Pricing determined by price matrix

Our customer account definitions include **Prospect**, **Key**, **Target** & **Strategic**. Outside of Prospect, all types would have a level of identification that has determined these clients require a level of importance and priority on how we handle and support the account. It's theses account definitions that allow us to view account management beyond just selling equipment. Focused energy on account management opens up our ability to expand account penetration and/or insulates us from the competition. Couple our account definition with classification provides the steps to preplan actions and completing a major step in relationship management.

Our ABCD classification is used to govern physical (site visit) or non-physical (email or phone call) touch points allowing for account management to be supported with proactive activities. Since activities are preplanned clarity is provided to all sales personnel on their time commitment to these primary accounts. Thus, allowing sales to schedule other development work necessary for continued growth.

Here is a breakdown of both our account definitions and ABCD classification strategy for Burt Process.

Account Definitions:
Prospect – New account with potential needs, however formal account identification has not been completed.
Key – Mature accounts generating revenue core to the success of a given territory.
Target – Account identified as having increased potential not yet maximized by the sales team
Strategic – Accounts identified as having potential but will require special handling or long term strategic planning to capture business.
**Key, Target or Strategic accounts are predetermined to be slated as a Premium (A or B) account in our classification (see chart above).*

By taking these strategies and supporting it with technology "Salesforce" provides us a powerful leap forward. Following this process will maximize our time while building our relationships with our beloved customers.

I remember years ago Steve Burt asked me "does your team know what they need to do when they wake up?" Implemented correctly, the answer is an easy "Yes". Waking up knowing the direction your going is powerful and positions us to follow the yellow brick road of success.

Preplan to win, respect your time and be vigilant to overcome barriers. All ingredients needed to be successful in the field or in life.

Motto

If it's not in *Salesforce*, it doesn't exist!