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CRM

Advanced CRM Solutions

How companies are pushing the envelope to help sales reps work more effectively

– GEOFFREY JAMES

A decade ago, CRM was so new that fully 50 percent of all installations were judged to be failures by the companies that purchased them. Since then, software vendors have focused their software on real-world sales challenges, so that run-of-the-mill CRM success stories are too common to excite much interest. However, there are some examples where companies have pushed so far beyond the limits of “vanilla” CRM that their success is a tribute to their bravery and creativity. Here are six of them.

SUCCESS #1

Honeywell Aerospace consolidates 160 disparate data sources.

Few things can play havoc with CRM more than a merger or an acquisition. At the very least, the combined firm faces a difficult and expensive CRM conversion process. That’s a problem that Honeywell Aerospace, a \$10 billion-a-year global provider of integrated avionics, had in spades. Following a series of mergers and acquisitions, the company’s customer information

was stored in more than 160 disparate systems, spread across 16 separate lines of business. It was not uncommon for several salespeople to contact the same customer during the same week, or even the same day, without knowledge of these other contacts. “Customers were telling us that we were too hard to do business with,” says Darryl Carroll, Honeywell’s senior director of defense and space business operations.

Not surprisingly, the company wanted to consolidate its customer information so that management could find out what was really going on in the field. To accomplish this, Honeywell hired Oracle/Siebel to build a comprehensive CRM capability that could be deployed throughout the entire company.

Since deploying this integrated CRM system, Honeywell Aerospace has improved customer satisfaction by 38 percent, increased its on-time service request closure rate from 45 percent to 83 percent, and improved its sales opportunity win rate. Just as important, the company increased annual after-market spare parts revenue by 100 percent from \$45 million to \$100 million.

SUCCESS #2

Avid Technologies empowers its global sales efforts.

If you've got a sales team that's deployed around the world, it's not good enough to have a system that's only in English and only supports the type of sales model that only works for U.S.-based businesses. That was the problem facing Avid Technologies, a \$775 million-a-year maker of digital editing systems.

Avid employs over 250 sales professionals, dispersed geographically to address local market requirements. The company's CRM capability therefore needs to support not just English but a wide variety of languages, including French, Danish, Arabic, Finnish, German, Mandarin Chinese, Cantonese Chinese, Japanese, Korean, Dutch, Norwegian, Spanish, and Swedish.

Unfortunately, until very recently CRM systems supported multiple languages by having alternative vocabularies "hardcoded" into the basic software. This clunky process made it unusual for a CRM system to support more than a small handful of languages. To make matters worse, the hard-coded nature of multilingual support meant that customizations to the basic system usually couldn't support anything except English, greatly limiting their usefulness.

Fortunately, Avid worked with Sugar-CRM to bring about an in-house implementation of Sugar Professional. This commercial open source solution has a template feature that automatically converts screens to a user-selectable language. Because Sugar Professional has templates for 24 languages, Avid could quickly and easily adapt its customized CRM implementation to the needs of the various regions. "The ability for the system to support multiple languages was a key factor in our buying decision," says Chad Wright, Avid's director of information technology.

SUCCESS #3

First American Equipment Finance turns telesales into relationship building.

Telesales is a cost-effective way to sell, but it sometimes lacks the personal touch that's inherent in face-to-face selling. That can be a real limitation if your business involves

working with small companies that value personal relationships and you don't want to build an expensive regional sales force.

First American Equipment Finance, a privately owned company that provides hardware and software lease financing, uses telesales reps located in New York and California to sell throughout the United States – and is still able to have that personal touch that helps build good relationships. To do this effectively, First American's reps must establish a relationship with each prospect over the phone, and then have a way to maintain a personal connection with each contact – without ever being present at the customer's facility.

Obviously, hiring personable telesales reps was an important part of First American's go-to-market strategy, but they wanted something extra that would help the process along. The company now uses a product called MapView for GoldMine that visually displays the contacts on a map. During a telesales call, a rep can press a button to show current customers and industry references in the surrounding area.”

This creative use of CRM data allows a telesales rep to personalize each call, even though the telesales rep may be thousands of miles away, according to Sean Miller, First American's vice president of information technology. “It's a great tool for the sales reps to be able to reference specific accounts in the same geographical area and be able to talk about the area itself.”

SUCCESS #4

Acclamation Systems offload clerical work.

A common complaint about CRM is that sales reps don't like spending time filling out online forms. Most sales reps are people-oriented and thus would prefer a CRM system that could take care of the details without requiring the sales rep to become a data-entry clerk.

Acclamation Systems, Inc., a privately owned provider of employee benefits management solutions, was determined not to fall into that trap. Rather than going with a traditional CRM provider, Acclamation went with an entirely new product concept, Landslide. In addition to the usual spate of CRM capabilities, Landslide includes access to “VIP assistants,” live personal assistants that the reps can access via phone or email in order to offload the busywork of entering contact management and reporting data. This approach frees the rep to spend more time on selling, increasing both sales effectiveness and job satisfaction.

This was particularly important to Acclamation Systems, because it is in a rapid growth cycle due to the increased automation in our healthcare systems. Because of this, Acclamation needed to ensure that each sales rep remains sharply focused on building the relationships that would continue to fuel market share and revenue growth, according to Mark Brown, Acclamation's vice president of sales. “We recently launched a new

product and were able to get our sales team trained and selling immediately by establishing a guided selling process with Landslide,” he explains.

SUCCESS #5

DTM Systems extends CRM throughout the corporation.

A common use for CRM is the “superpowered contact manager.” Under this popular form of CRM, the system tracks the contact data for each customer, as well as each activity that the sales rep conducts with that customer. This allows the manager to check on the status of the pipeline.

While there’s nothing wrong with using CRM for these relatively simple purposes, simply using CRM to enter customer data doesn’t necessarily result in big productivity gains, according to Tanya Tougas, marketing manager for DTM Solutions Corp., an information technology startup headquartered in Vancouver, BC. She explains that in their original CRM implementation, “each user was essentially creating their own style of data tracking and lookups, so there was no centralized system in place for reporting or for marketing activities. [As a result,] there was duplication of effort and disorganization [while] account managers had customer histories that other DTM staff didn’t know about.”

What DTM needed, according to Tougas, was the ability not just to track the pipeline, but to share critical information among all the different departments in the firm. For example, in addition to interfacing with sales, DTM’s marketing group wanted to run, create, and track mailings to specific groups of customers in support of local trade shows. Similarly, DTM’s accounting group wanted to use the CRM system to obtain accounts receivable history and to track and schedule collection calls. DTM’s service team wanted to use the CRM system to look up customer account standings prior to providing support.

To accomplish this, DTM did something that would once only have been possible inside a much larger firm: It upgraded its existing CRM capability to a full-function system. In DTM’s case, it was Maximizer Enterprise that allowed the company to offer data from the CRM system to other departments in a way that is meaningful. As a result, Tougas says, “We’re seeing results now in increased utilization, and with improved data integrity.”

SUCCESS #6

ThoughtLava transforms email into a prospecting tool.

Email is a common sales tool, but few companies use it to its full potential, according to John-Scott Dixon, president of ThoughtLava, a Phoenix Arizona-based startup that provides Internet marketing and Website design services. As a Web guru himself, Dixon realized that there was more that could be done with the technology, so he acquired a product called Sales-Genius, which can track customer visits to the corporate site when they click on links embedded in an email document.

The minute a prospect opens an email message and visits the ThoughtLava Website, SalesGenius sends the sales rep an alert and then tracks the pages that the customer examines during the visit. This process helps build a profile of that customer's interest level and specific area of interest, which allows ThoughtLava to better target its sales activities. "If we haven't received an inquiry within a day, we send a second email to the interested prospect, tailored to his or her interests based on the content that was perused," explains Dixon. Within the email, the rep can also invite the prospect to take the next step – such as a telephone conversation, a further email exchange, or even a specific proposal.

SalesGenius also keeps a record of how each rep has communicated with each customer so that the reps can hone their ability to cultivate each prospect. As the body of information about each prospect increases, ThoughtLava can use that profile to narrow their prospects and focus on the ones who are most interested, and then provide them with personalized presentations that cater to their actual needs, resulting in more closed deals.