



# Top tips for effective selling

Includes powerful tools  
and exercises to drive  
fresh thinking

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# Introduction

The objective of this eBook is to provide an insight into how sales managers and owners of small and medium sized businesses can sell more. We also aim to share practical advice from seasoned sales professionals and provide access to a library of sales best practices.

We want you to consider the tools you need to build upon your sales success; in particular how a Customer Relationship Management (CRM) solution could help you save time, reduce paperwork, and provide you with greater visibility and control over sales results. Most importantly, we want you to think about how a CRM solution could help you track key sales priorities and boost sales.

Please don't get hung up on the term 'CRM'.

It is not a matter of IT and hardware or software and it is not a technology decision. It is about helping you to sell more effectively and grow your revenues. This eBook contains little, if any, reference to computer software or the cloud; rather the focus is on the practical challenges you face in sales and how these can be addressed.

Our perspectives and techniques are designed to boost sales. They address different aspects of the sale—from generating leads to forecasting - and the objective is to help you focus on areas that matter most.

You can read this eBook from cover to cover, or you can dip in and out of the areas of most interest to you. This eBook is designed to be practical, and each tip contains a checklist, prompt or tool that you can apply to your business.

Enjoy the eBook and happy selling!

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“Lead generation is the Cinderella of sales and marketing, but without the glass slipper. It does not get the attention that it deserves in most organisations and... there is a price to be paid in terms of lost sales.”  
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# Chapter 1: Sales leads: the surprising potential to boost your sales

## Could you sell more if you had more high-quality sales leads?

If you answered yes to the above question, you are in good company because 4 out of 5 managers say they could sell more if they had more high-quality leads.

In this chapter, we share some good news: even a small improvement in your company's approach to lead generation could significantly boost sales.

## Why lead generation deserves your attention

You may share the view of many sales managers who argue lead generation is necessary but not very exciting. Or you may believe lead generation is reliant on marketing and outside your direct control.

However, lead generation deserves your attention because of the rewards it can offer.

*“Lead generation is the **Cinderella of sales and marketing**, but without the glass slipper. It does not get the attention that it deserves in most organizations and... there is a **price to be paid** in terms of lost sales.”*

*Sales consultant*

## The good news about leads

The formula for finding new customers used to be simple. To boost sales, you made more calls, sent more emails, and posted more direct mail. In today's market conditions, once successful lead generation campaigns are struggling, and conversion rates are at an all-time low.

*“For many, lead generation is a no-man's-land - it neither fully belongs to sales or to marketing. One side blames the other and it is not clear who is responsible for fixing the problems.”*

*Sales consultant*

Many sales managers complain about the quality or quantity of leads. This is because lead generation has struggled more than any other aspect of sales and marketing over the past 5 years.

However, great companies are not fatalistic about lead generation and its potential to deliver sales growth. They know something others don't.

Even a modest improvement in a company's approach to lead generation can dramatically boost sales.

## Put this tip into action



**How happy are you with lead generation? List 5 way you could generate more high-quality sales leads.**

### Leads —the surprising payback

Salespeople often say they could sell more if they had more or better sales leads. They sometimes blame their woes on poor lead generation. However, a good salesperson isn't held hostage by poor-quality sales leads.

*“If I get in the door to meet a qualified prospect, then I have a real chance of **winning the sale**. The problem is that I don't have enough qualified prospects to meet. The leads provided by marketing suck!”*

*Salesperson*

Most sales managers don't realize how much even a small improvement in lead generation could boost sales. This kind of effort can deliver a payback ahead of most other sales or marketing initiatives.

Managers who have worked on improving lead generation are boosting their sales revenues by anywhere between 5 and 35 percent. This is one of the most powerful secrets of sales.

*“When we analyzed a lot of the key challenges we faced in sales, we were able to trace their origins back to the way we handled lead generation in our business. Moreover, we realized that **improving the quality of leads was essential to improving win rates.**”*

## Put this tip into action



**Do you know how many leads it takes to generate one sale in your business? This ratio of leads to sales gives you much of the information you need to boost your sales and marketing efforts.**

*Sales manager*

### What could improving leads do for you?

Few companies fail to reap the rewards of improved lead generation (i.e. a major boost in sales). The question is how can you uncover the extent to which your business could benefit?

## Put this tip into action



**The potential of a business to drive sales is proportionate to the business's scope for improvement.**

**Here is a checklist to help you quickly gauge the effectiveness and sophistication of your lead generation efforts.**

### Lead generation checklist

For this exercise, put a check mark beside efforts present in your business:

1. Sales leads appear as much by accident as by design, leaving the company vulnerable to a slowdown in inquiries or the loss of a major customer. Where there is active prospecting it is sporadic or triggered by an imminent sales need or crisis.
2. Salespeople regularly complain about the shortage of leads and time spent cold calling.
3. Salespeople waste a lot of time on poor-quality leads. There are regular complaints about tire kickers and a desire to only meet people who are ready to buy.
4. Teams are regularly surprised by sales setbacks. At the root of this problem is patchy information, which results in over-optimistic sales forecasts.
5. The names on prospect lists or sales pipelines roll over from month to month, with little cleansing of old names or elimination of cold leads.
6. If a salesperson leaves, their prospects and leads disappear. This means the remaining sales staff rely on inquiries, personal contacts, or one or two primary lead sources.
7. There is an overreliance on cold calling, which salespeople complain about struggling to find time for.
8. There is friction between sales and marketing regarding leads. Leads may not be seen as a job for marketing staff. As a result, the prospecting of sales teams and the discrete and sporadic activities of marketing staff (trade shows, ad campaigns, etc.) are separated.
9. A contacts management or CRM tool (such as Sage CRM) is underused, resulting in poor metrics regarding lead quality, cost, and conversion rates. This means leads are inevitably lost.

## Understanding your score

The checklist is a measure of fit between your organization's lead generation and your sales targets and aspirations.

Here is a guide to understanding your score:

**7-9 check marks:** Lead generation is likely to hinder your sales success. It is time to apply the same sophistication to lead generation as to other aspects of sales.

**4-6 check marks:** There is significant room for improvement in your organization's approach to lead generation. Remember, even a modest improvement can impact significantly on sales.

**1-3 check marks:** Well done, you are in the top league of lead generation. However, there may be room for improvement.

*"If your lead generation is broken, take heart. Fixing it could give your sales the greatest boost you could possibly imagine!"*

*Sales consultant*

Remember leads can and should be a good news story. Don't worry if there are problems with your organization's approach to lead generation — this means there is a greater potential to drive sales.

## The role of CRM in lead generation

It is difficult for any organization (big or small) to drive lead generation improvements without an effective CRM tool.

Here are some of the implications of not having a tool for managing lead generation:

1. Leads exist in different places —e.g. spreadsheets, business card holders.
2. There is no central repository meaning time is wasted searching for names and other information.
3. Leads are not followed up while others go missing or fall through the cracks.
4. The target lists are of poor-quality and go out of date. Or there is a reliance on bought in lists.
5. A followed-up lead may be discarded unless the customer is ready to buy. Similarly, customers who ask for call backs don't receive them.
6. It is difficult to track where leads come from, and therefore to measure the effectiveness of different sources like the web, trade shows, etc.
7. Managers without access to immediate conversion rate figures don't know how many leads their business needs.
8. Leads generate extra work that a tool could automate. This includes capturing email inquiries directly from the company website and the sending of email newsletters.

You cannot manage lead generation through the use of spreadsheets, mailings lists or business card holders. Organizations without a working tool are paying a penalty in terms of lost leads and ultimately lost sales.

## Conclusion

Now you know the importance of paying attention to lead generation and the importance of improving the ratio of leads to orders.

Working on lead generation could deliver a 15 to 35 percent increase in sales. However, you need the help of a CRM tool if you want to take lead generation to the next level.

### What's next?



**In the next chapter, we explain 3 strategies for boosting lead generation. We also reveal a secret of lead generation that can increase sales by anywhere between 5 percent and 35 percent.**



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Sales managers can double the effectiveness of lead generation by adopting a contact-nurturing mindset. And they can potentially increase sales by anywhere between 5 percent and 35 percent.  
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# Chapter 2: Sales leads: adopting a contact nurturing mindset

## Are you ready to take lead generation to the next level?

In the last chapter, we revealed how improving your approach to lead generation impacts on sales. Now, we examine how to achieve payback.

### The fundamental ingredient of success

The list of ways to improve lead generation is almost endless. Examples include: new sources like social media; new techniques for generating demand; and new ways of communicating your message.

No matter what strategies or techniques you employ, there is one fundamental ingredient of success: you must adopt a contact-nurturing mindset and manage your leads like contacts.

### A new mind-set

Managing your leads like contacts sounds like a play on words, but it is not. The table below explains the differences.

Why leads are out	Why contacts are in
Leads are generated and prequalified	Contacts are nurtured
Leads require a campaign	Contacts require a conversation
Leads are often cold	Contacts are often warm
Lead generation is often sporadic	The nurturing of contacts is on-going
Leads are short-term in focus	Contacts require a long-term view
The objective is a meeting/sale	The objective is to build a relationship/dialogue
Leads go stale	Contacts can last forever
Leads are found in many places	Contacts live in a database/CRM tool

Why contacts are in and leads are out, Collis & O' Gorman, 2010, The B2B Sales Revolution, page 118.

To sum up these differences: it costs money to generate leads (often with a questionable return) whereas nurturing contacts is an investment in tomorrow's sales.

Our research tells us sales managers can double the effectiveness of lead generation by adopting a contact -nurturing mindset. And they can potentially increase sales by anywhere between 5 percent and 35 percent.

### What is your business mindset?

What happens in your company when you receive a lead or when a salesperson hangs up the phone? Is there a system to ensure the next contact takes place on time or as agreed? If not, your company can quickly slip from a prospect's mind, leaving the scene open for a competitor.

## Nobody gets left behind

The U.S. Marines have a policy that nobody gets left behind. The best sales teams apply this principle to lead generation. They maintain ongoing dialogue with the entirety of their contact base, with the frequency of contact determined by a rating of the sales potential. They also use many sources and touchpoints.

## Combining multiple sources

Combining multiple sources is the key to effective lead generation. It means, for example, integrating a telesales initiative with a campaign landing page on your website, with an email newsletter, or with anything else you may have in your marketing armory.

If one method fails to reach or inspire a potential customer, the next method may succeed. Each subsequent contact sustains dialogue; we call this a nurturing process and it is the core of effective lead generation.



Combining multiple sources is the key to effective lead generation.



This process is an example of how sales and marketing can work together to successfully nurture a prospect to the point of sales readiness.

## Developing a nurturing process

Thanks to the increased power and sophistication of CRM tools, it is possible to show you an example of what the future of lead generation looks like. This example is called a nurturing process and it involves multiple sources and multiple touchpoints over time. This process is an example of how sales and marketing can be orchestrated to nurture a prospect to the point of sales readiness.

## Can you create a nurturing process for your leads and enquiries?

If you have a good CRM tool, putting a nurturing process in place is relatively easy, and you can automate much of the contact activity within.

## The role of CRM

It is difficult for any organisation (big or small) to drive lead -generation improvements without an effective CRM tool.

Organisations without a CRM tool are paying a penalty in terms of lost leads and ultimately lost sales.

With a tool to support your nurturing process, you will be able to track the degree of engagement and the effectiveness of different sales and marketing activities. Without a CRM tool, you will continue spending money on leads, as opposed to investing in contacts that generate tomorrow's sales.

## Creating a dialogue

Recipients must welcome contact from your company. Your job is to make sure communication has a real value. For example, send:

- An article, or white paper that may be of interest
- A special offer of value to the customer
- A link to a website containing useful information or research

It is also important to ensure there is an optout at every stage; this is where a good CRM tool can help.

## Conclusion

Now you can think in terms of contacts rather than leads. This type of mind-shift is required in order to take lead generation to the next level.

Finding the value of leads and nurturing these leads over time is at the heart of a contacts mindset. It is also the fundamental driver for the use of a CRM tool.

### What's next?



**In the next chapter, we examine one of the most contentious issues of lead generation: the quality of lists.**

**If you have ever asked the question, "Where can I get a good list?" this chapter is specifically for you.**



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The reality is that you cannot buy  
a good list. Good lists are built, not  
bought. The failure to grasp this  
reality is at the core of many of the  
problems in marketing and sales.  
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# Chapter 3: The power of good customer and prospect information

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## Are you looking for a good list of customers?

You may have asked the question, “Where can I get a good list of potential customers?”

Although this is difficult to answer, the question reveals a lot about the effectiveness of your sales and marketing efforts.

In this chapter, we share our views on the kinds of lists you need. We also warn against the types of lists that will frustrate sales.

And, we share the secret of great lists.

## You are responsible for your lists

Sales and marketing teams are responsible for building and maintaining their target customer lists. This responsibility starts with deciding which type of lists to buy.

When teams get it wrong, they harm their sales efforts and reduce the response rates of company marketing as a whole.

Let me illustrate by describing an email I received recently.

The email offered thirty three email and direct marketing databases for sale. These lists may have excited some salespeople but my response was one of dread.

### Stop! Don't buy that list

I thought of all those poor unfortunates listed on the databases. I thought of the tidal wave of unsolicited, crude and poorly-targeted emails; of the cold calls; and of other forms of nuisance marketing heading their way.

I felt shame for the broker selling these lists. He or she is making life immeasurably more difficult for the careful marketers committed to using email marketing correctly.

The databases were on sale for the “knockdown” price of \$836.70, but I am confident they aren't worth \$83.70. The listed names have experienced so much cold calling and spam marketing that they have developed immunity - or, at least, a resistance - to other, more legitimate forms of contact.

*“Buying cut-price lists such as these constitutes nothing short of marketing terrorism - it is both indiscriminate and destructive. Using the wrong list in the wrong way has resulted in a general slide in terms of marketing's standing.”*

*Marketing consultant*

If you are tempted by these emails, I urge you to reconsider your approach to sales and marketing.

*“The reality is that you cannot buy a good list. **Good lists are built, not bought.** The failure to grasp this reality is at the core of many of the problems in marketing and sales.”*

*Sales consultant*

A manager should regard these lists as an act of self-sabotage. The quality of lists and the quality of sales and marketing are one and the same; this automatically puts the quality of a list at the core of marketing.

If you use poor quality lists, this means:

- Poor targeting and prequalification
- Ineffective marketing
- Poor conversion rates
- Wasted sales effort

Bad lists frustrate customers and make them move more emails to their spam folder and send cold calls to their voicemail.

*“Organisations who buy in new lists or fail to keep old lists up to date are doing both themselves and their customers a great disservice. They deserve to suffer from poor response rates and end up in spam folders.”*

*Sales consultant*

### Bad lists mean bad results

Searching the internet or buying pre-cooked lists from a broker will provide you with basic raw materials. However, a good list - one that truly rewards your sales efforts - has to be built. And it is developed and refined over time.

*“If you invest in developing and maintaining good quality lists of both your existing and your target customers then you will be rewarded. But, if you take shortcuts your results will suffer.”*

*Sales consultant*

Once you have built a list that reflects your target customer profile, your CRM tool will help you to keep your list fresh. Regular scrubbing will ensure target lists and customer data are up to date. This includes:

- Removing companies that no longer exist
- Contacts that have moved
- Changes in terms, contact details or personnel
- Opt-outs from your marketing and so on

### Mind your assets

The records in a CRM tool, or even names on a list, represent valuable business assets. However, most managers don't think of them this way.

Every name in a good list or database has a monetary value and the more complete and up-to-date that information is, the greater its value.

Not only is your customer and prospect information essential to the smooth operation of the business, but it is expensive to gather in the first place.

*“The quality of the list matters. It matters in the same way the skill of the salesperson or the attractiveness of your sales proposition matter.”*

*Marketing executive*

An average salesperson with a great list can beat a great salesperson with an average one. Poor lists are the number one cause of struggling sales and marketing campaigns.

*“I always say to managers who struggle with the value and importance of their data, to think of what their competitors would do if they had [this data].”*

*Database consultant*

It is worth investing in quality customer and prospect records. And if this information is to serve you well, it deserves a good home in the form of a CRM tool.

## Principles of good list management

Here are nine principles surrounding good customer and prospect list management:

**1. One list is better than 10:** Pooling all names into one master list is critical, because this is the most effective way of removing duplicated data and keeping information up to date.

**2. Size isn't everything:** A list of 400 well-chosen names and up-to-date records is better than 5,000 randomly selected and incomplete pieces of information. With a CRM tool, you can partition good information from raw data without losing anything.

**3. Lists benefit from multiple sources:** It is easy to track these sources in a CRM tool. And the more you prune and refine your list, the better it will become. Similarly, regularly updating information on a list increases its value.

**4. Records within a CRM tool need to be categorised** in terms of existing customer, past customer, and so on. Records should also be categorised in terms of potential future sales using A, B, C ratings or other relevant labels.

**5. Contact names are central to an effective list:** there is little value in storing the name of a company without the names of relevant contacts.

**6. Important customers within a CRM tool should have an associated next action:** this may be a future call, or simply an email newsletter. There is no point in having names in a database unless you do something with them.

**7. A customer who has opted-in to your list is worth 10 customers who haven't:** If you send emails to people that don't want them, you will end up in their spam folder. Tracking opt-outs to your calls and emails is important and can be a legal requirement. A CRM tool can help with this.

**8. Search is central to a good list:** a CRM tool enables you to search not just by name but using criteria such as:

- Town, city, region or country
- Company size or industry sector
- When a person last placed an order
- Those who have not placed an order in the past 3 months
- Those who ordered product X but did not buy product Y

**9. A good list captures information of value:** Salespeople often complain about having to enter reams of customer data into forms or CRM tools. This includes information that will never be used or which could be found elsewhere. Your CRM tool should allow you to determine:

- The required fields of information
- Types of mandatory information
- Fields to be removed
- Labels to be used for different fields
- If you want to enter information as text or by selecting from a drop-down list

## Conclusion

Many managers rightly complain they cannot buy a good list. The only good list is the one you prune, refine and develop over time. Bought in lists are a useful source of raw data, but the validation of this information is what makes it valuable.

This is where a CRM tool can help.

### What's next?



**In the next chapter, we focus on the sales effectiveness and on improving the quality of sales calls and presentations.**

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Reducing the number of sales calls or presentations that go nowhere by just 3 per cent could increase sales by anywhere between 15 per cent and 35 per cent for most companies. Few other sales strategies could have such a dramatic impact on sales.  
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# Chapter 4: Sales calls and presentations - increasing your success rate

## Are you balancing selling harder with selling smarter?

In sales, it is essential to get the balance right between working hard and working smart. When you take stock of your monthly progress or plan for the month ahead, you should pay attention, not just your levels of sales activity, but to the effectiveness of sales.

In this chapter, we explain why it's not enough to simply make more sales calls and presentations. We also examine the role a CRM tool can play in maximising the effectiveness of your sales calls.

## The two levers of sales success

Sales managers have two levers of sales success:

1. The lever of **sales activity**: when pulled, this lever increases the number of calls, presentations and quotations.
2. The lever of **effectiveness** of sales activity: when pulled, this lever increases the quality of calls and presentations and conversion rates.

One lever is used a lot more than the other. Can you guess which one?

When under pressure to meet a target, 9 out of 10 sales managers reach for the activity lever. They demand more calls and presentations. The results are mixed.

*“It is often said that ‘sales is a numbers game!’ But that is one of the greatest misconceptions in all of selling. Yes, working hard is important but **working smart is also vitally important, so too is having the right strategy and skill.**”*

*Sales consultant*

## Put this tip into action



**What is your sales strategy for the next quarter? Does it involve more activity or increased effectiveness? Why not plan your sales initiatives under each heading?**

**Plan for things you can do to drive more sales calls, presentations, etc., and plan for things that increase effectiveness of your calls, presentations and so on.**

## Why more sales calls isn't enough

Hitting the phones or the pavements is a natural response from sales teams to pressure. The problem is when the number of calls and meetings increases, the quality of calls and meetings decreases.

Making more calls makes managers feel better, but it is not necessarily a long term strategy for higher sales or more satisfied customers.

*“We have tended to focus on levels of activity, and a key metric is the number of calls made. Then, last year we set a target for the minimum number of sales presentations. That was a mistake. People started booking presentations with people who had no real interest in buying, prequalification went out the window...”*

*Disillusioned sales manager*

Conversion rates from leads or presentations are under pressure in many organisations and industries. This means sales costs are rising and salespeople have to work harder just to stand still. Getting the balance right between activity and effectiveness is central to your success.

*“Have you given any thought to the cost of a sales call, or a presentation? You should – most likely it will astound you. **The cost of a sales call by phone can be \$33 or more** for each customer. **The cost of a face to face meeting with a customer can be in the region of several hundreds dollars.** It puts the focus on getting the most out each call or meeting.”*

*Sales consultant*

### The activity/effectiveness seesaw

The relationship between the level of sales and marketing activities and its effectiveness is unclear. It's counter-productive to increase the level of sales activity without considering the effectiveness of a campaign.

These questions offer a window into your team's success, but they are difficult to answer without an effective CRM tool.

Managers need to sell smarter not just harder. Without an effective CRM tool to track sales against the number of calls, meetings and quotes and proposals, managers are blindly riding the activity/effectiveness seesaw.

#### Put this tip into action



**Two questions reveal the dynamics of success within your sales organisation. Can you answer them?**

- 1. How many calls or presentations are made during a typical month?**
- 2. What proportion of calls or presentations are successful (in terms of generating a sale)?**

*“I added up all the meetings we had with customers and then looked at how many were successful (as in resulted in a sale). 3 out of 5 meetings went nowhere and at least 1 in 5 meetings were a complete waste of time (because we were meeting the wrong people). It was a real revelation.”*

*Sales manager*

### Most sales calls miss their mark

Every day millions of sales calls and presentations take place online and face-to-face. Most are unsuccessful.

This is a sobering reality and a rallying call for sales managers. It makes improving the quality and effectiveness of sales calls, presentations, quotes and any other interactions with the customer a priority. However, this isn't easy.

*“Reducing the number of sales calls or presentations that go nowhere by just 3 per cent could **increase sales by anywhere between 15 per cent and 35 per cent** for most companies. Few other sales strategies could have such a dramatic impact on sales.”*

*Sales consultant*

## The sales conversation

Customers are busy – they have lots of demands on their attention. This is compounded by decision makers feeling weary about talking to salespeople.

It takes more emails, calls and voicemails to talk to customers and it is an expensive business. However, getting through to a customer is only part of the challenge.

Talking at the customer is one thing but engaging with the customer is another. A customer or prospect may pick-up the phone or turn up or at an appointment, but that does not mean that they will open up and engage with the salesperson.

*“In the case of most sales calls the salesperson has only a few minutes to get the message across, perhaps even less. Plus as they are selling by phone they have to rely on their words alone. They rarely have the customer’s full attention either. It is quite a communications challenge.”*

*Telesales manager*

## Customer engagement - the new battleground

It is too easy for the seller’s message to get lost in a sea of emails, voice mails and Tweets, but customer engagement is the elixir of the sale; without it, the seller cannot know if their sales pitch will succeed.

The challenge is to engage with your customers and prospects. This will help you reduce the number of sales calls and presentations that go nowhere. You can start by improving the quality of sales conversations.

## Competing on the quality of your conversations

Most sales managers don’t measure the quality of the conversations their salespeople have with customers. They don’t put time aside to listen to sales calls or sit in

### Put this tip into action



**What is the quality of conversations your sales team is having with its customers? How would you rate it out of 10?**

on sales presentations. This is a real lost opportunity.

*“My jaw dropped on listening in to some of the calls being made to our customers. As the manager, I was not impressed and I am pretty sure that the customer was not impressed either. But I learned lots - the path to improvement was pretty clear. My advice to all managers? Listen in on some of your calls.”*

*Sales manager*

## Try listening to a sales call

The manager who listens to a call is often surprised. Here are some of the typical reactions:

- “If I got that call I would not have been very impressed.”
- “There were buying signals that were completely overlooked.”
- “Why did they say that? It is not accurate in terms of how the product really works.”
- “Why didn’t they know the answer to that question? We covered it in training.”
- “It sounded like a cold call - like a salesperson who is only interested in the sale.”
- “The salesperson did all the talking and didn’t ask enough questions.”
- “The salesperson did not clarify what the customer wanted to do next.”

### Put this tip into action



**Do you think you would react in any of the above ways if you listened to a sales call made by your sales team? Why not find out.**

## Measuring the quality of a sales call

Below is a checklist for analysing the quality of a sales call by one of your team. The objective is to identify ways in which the conversation with the customer could be improved.

### Call quality checklist

Here is a six-point checklist that will help you analyse the quality of a sales call by one of your team. Listen to a call and then fill it out.

1. What 3 words would you use to describe the call?

(a) \_\_\_\_\_ (b) \_\_\_\_\_ (c) \_\_\_\_\_

2. How impressed (on a scale of 1 to 5) are you with the call from the point of view of:

(a) The customer/prospect?  (b) The manager?

Scale: 5 = 'very impressed' and 1 = 'not impressed at all'

3. How would you rate the message (using the same 1 to 5 scale) in terms of:

(a) Clarity?  (b) How compelling it was?

4. Was there a clear next step?

Yes  No

5. How would you rate how the person making the call sounded in terms of each of the following (using the 1 to 5 scale):

(a) Confident?

(b) Knowledgeable?

(c) Respectful?

(d) Professional?

(e) Enthusiastic?

(f) Relaxed?

6. Do you have any advice or suggestions as to how the call could be improved?

Take care when sharing feedback about a call with another salesperson. The golden rule is to start by highlighting what you liked about the call. Stay focused on the positive and only comment about the call and the message, rather than about the caller.

### Conclusion

Now you know the importance of improving the quality of sales calls and presentations and the need to track your degree of success.

### What's next?



**In the next chapter, we share some practical ways you can make a greater impression on your customer and sell more. Specifically, we look at the information you need to sell.**

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The salesperson with a CRM system has an advantage in terms of being more professional, organised and helpful in the eyes of your customer. That puts the salesperson who relies on spreadsheets, notepads and scraps of paper at a disadvantage.  
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# Chapter 5: Tackling the information deficit behind sales calls and presentations

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## What information do you need to make high-quality sales calls?

Do you have all the information you need on customers and prospects, or are you wasting unnecessary time looking for information?

The more information a salesperson has to hand, the more effective he or she can be. More information means more sales.

Better lists and access to contact information can help a salesperson line up more calls and presentations. Access to customer and prospect information can maximise the effectiveness of sales calls and improve the impression callers make on customers.

All this explains why a CRM tool can help salespeople sell more.

## Information is power

The salesperson with information about their customer and their products will outperform his or her peers. He or she can make better calls and presentations.

The salesperson with an accurate and up-to-date target list, which contains a current contact history and a customer profile, has a real advantage over others:

- They don't have to search for contact names on business cards or the web.
- They don't have to consult address books or directory listings on the web.
- They don't have to hang up the phone in frustration because a customer called and complained that they should have been removed from a list.
- They don't have to ask others to find out if a customer has been dealt with or contacted before.
- They don't have to check manually to see if a company has opted out of in-bound marketing calls.

This means the salesperson can move effortlessly from one call to the next. If they are making a call back, they can continue where they left off on the previous call, rather than starting from scratch. And they can make more call-backs instead of cold calls.

*“For many sellers, the challenge is to warm up cold calls and the best way to do that is by gathering and storing information about the customer you are calling. In this way, **the customer stops being an anonymous target on a list...** [and becomes] a real person with profile information, interests, a contact history and next actions for the salesperson.”*

*Sales consultant*

Easy access to information can create a positive impression on the customer and a preference for one seller over another.

## The information deficit

Without an effective CRM tool, salespeople don't have the information they need to be effective. They are often left searching for:

- Customer contact details
- Records of calls and what was said
- Notes of customer meetings
- Schedules of future appointments or call-backs
- Logs of past enquiries
- Records of issued quotes and received orders

The resulting deficit of information limits the effectiveness of sales and marketing efforts. It impacts on quality of the sales conversations as well as proposals or quotations.

For managers, these information gaps present serious challenges. They undermine the manager's ability to forecast and manage sales.

*“Know your customer is a core marketing principle, but **without an effective CRM system how can an organisation really know its customers?** The absence of such knowledge hinders the effectiveness of sales and marketing in so many ways.”*

*Sales and marketing consultant*

Ensuring your salespeople have the information they need is key to making a better impression on the customer, but this cannot be achieved using spreadsheets or Outlook (a point we will subsequently explore).

*“As citizens and consumers we are often told that we leave a digital trail. Our Facebook and Twitter activity, combined with the GPS tracking on our phones and the IP addresses of our computers captures information regarding much of our lives.*

*All this can give rise to ‘Big Brother’ concerns. However, the reality is that many companies have only meagre information on their customers. They have little or no information trail to follow.”*

*CRM consultant*

## Making an impression on the customer

You want your sales team to make an impression on the customer, but without a CRM tool they will struggle to do so.

### Put this tip into action



Think of the last time you received a call from a salesperson. Were you impressed?

Specifically, did the salesperson:

- Have all the information to hand when they called?
- Have a record of any previous contact?
- Know your order history?
- Take notes of your requirements and confirm them back to you?
- Have the information to hand needed to answer your product related questions?
- Schedule a time that would suit you for a call back?
- Promptly email you any information that you requested during the call?
- Follow-up as promised in 2 weeks or 3 months?

These factors make an impression on the customer. They matter if you want customers to prefer dealing with your salespeople over your competitors'.

*“The salesperson with a CRM system has **an advantage in terms of being more professional, organised and helpful in the eyes of your customer.** That puts the salesperson who relies on spreadsheets, notepads and scraps of paper at a disadvantage.”*

*CRM consultant*

What kind of impression do your salespeople make?

Are your customers likely to hang up the phone after a call with one of your salespeople and say:

- That salesperson did their homework
- He or she knows my needs, my business and my industry
- He or she shared some useful information with me
- That person was genuinely interested in my needs and how they could be met
- He was knowledgeable about my company's products and services
- She was organised and professional

Using a sales tool can help you improve the impression your salespeople have on customers.

### Put this tip into action



**How many of the above compliments do you hear from customers? What can you do to get customers to say these things about you or your salespeople?**

### Managing customer engagement

The traditional view stated good salespeople are natural born sellers. The challenge was to hire those who had a sales skill set and avoid those who didn't.

Reality is more complex. While the natural talent of the salesperson is important, there are many other factors.

*“Few managers would deny that the quality of the target list, the appeal of the proposition, or **the tools and support available to the salesperson influence the degree of success enjoyed.** It is not just about the salesperson anymore; the issue of sales process is now centre stage.”*

*Sales consultant*

### Why the sales process matters

You may have heard of the term, sales process. It suggests that when it comes to selling, the 'how' is as important as the 'who'. It suggests an ad-hoc or off-the-cuff approach to engaging with customer is not enough.

The move towards a more structured approach to sales warns against too much variation from salesperson to salesperson and from customer to customer. It leaves too much to chance and inevitably results in a customer experience that can vary greatly.

*“It amazes me sometimes how two salespeople working for the same company can have such **different ways of selling the same product**, including the benefits they communicate, the questions asked and so on. Although there may be lots of different ways of selling a product they don't all work equally well. **It is important to standardise on the best way** - that is what the sales process is all about.”*

*Sales consultant*

Adopting a more structured approach to sales presents an important opportunity for managers to boost the success of sales. It also improves the quality of customer engagement.

### Put this tip into action



**Write out the key messages, questions and steps involved in a sales call or presentation. Then look to how your sales calls and presentations can be standardised to include them.**

### Adopting a more standardised approach

The question often arises as to how much discretion should be left to salespeople in respect of what they say. We don't believe that parroting a sales script makes for good customer conversations. It stifles engagement and dulls the job for the salesperson.

However, conversation guides or prompts are essential and including them in your CRM tool can be really helpful. This is particularly important when it comes to capturing the needs and requirements of your customers.

### A systematic needs analysis

For most companies, there are 3-5 questions that must be asked in order to lay the foundation for getting an order. The only problem is these questions are not always asked. This means solutions are presented and quotes or proposals are issued without all the required information.



*“From time to time, I would hang up the phone after talking to a customer and realise that there was an important piece of information that I had forgotten about. Now that we are using a sales system this does not happen anymore.”*

*Salesperson*

By using a CRM tool, you can ensure all the required sales information is gathered during interactions with the customer. You can create a number of steps to take the customer systematically through a process of clarifying their needs and requirements.

You can require that certain information is entered before creating a new record (e.g. a lead or an opportunity) or issuing a quote. This means nothing is left to chance.

*“When new salespeople join our team the **prompts that appear within the CRM system are particularly helpful.** For example, we have a prompt regarding special promotions - where the salesperson is reminded to tell the customer about any deals we have on offer. **This simple measure alone has generated a lot of additional revenue.**”*

*Sales manager and CRM advocate*

### Put this tip into action



**Make a list of the top 3-5 questions that must be answered on a sales call for your business. Then keep the list with you at all times. These questions will help you sell.**

### Don't ask the same question twice

This is another example of the many ways the ability to capture and access information holds companies back from selling more. This happens regularly in many sales teams. Questions typically repeated include:

- What size is your company?
- Have you dealt with us before?
- Who did you talk to when you called the last time?
- What does your company do?
- When did you place the order?
- What product or service are you interested in?
- Can I take your details please - what is your phone number or email address?

These questions don't just waste time, they also frustrate the customer who has to repeat themselves or submit to a barrage of questions. It leaves the customer with the impression of an organisation that does not listen or cannot remember.

*“Take better notes of meetings and calls, including the products or services, the customer's requirements and any [other] information. Put those notes in your CRM and before you go onto the next call, or appointment, schedule a follow-up action, if one is required.”*

*Sales consultant*

### Conclusion

In this chapter, we focused on how gathering customer information gives you an edge. It can help you make more high-quality calls.

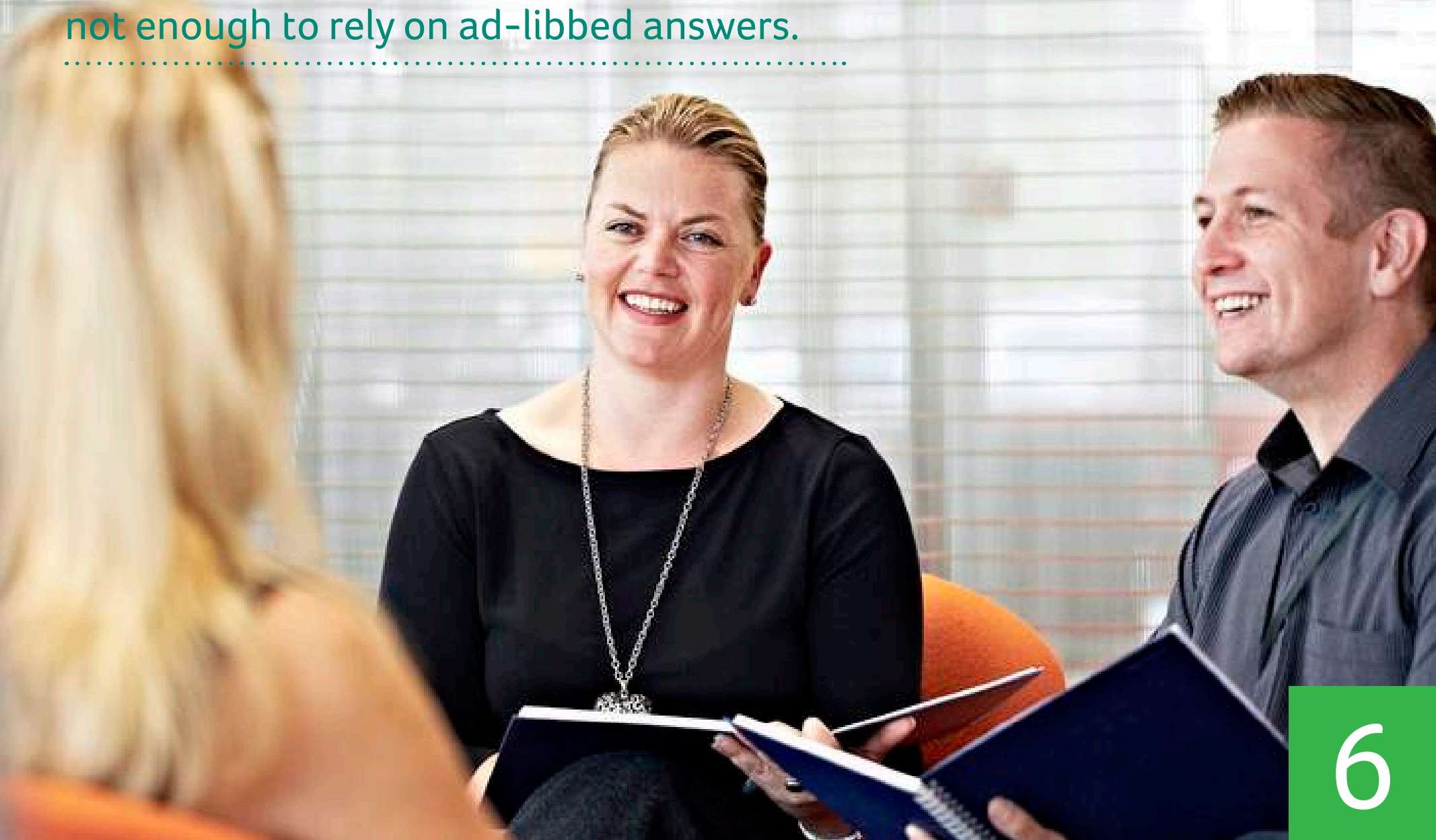
We also showed how using information effectively can make a real impression on customers and discussed the need to adopt a more structured and less ad-hoc approach to customer conversations.

### What's next?



**In the next chapter, we explore how looking for the common themes within a sales call or presentation can significantly boost sales. We also examine the questions and objections commonly raised by customers and prospects.**

.....  
In the heat of a sales presentation, even  
an expert can stumble when faced with a  
complex or difficult question. This is why it's  
not enough to rely on ad-libbed answers.  
.....



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# Chapter 6: Don't get caught out

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## How to prepare for customer questions and objections

When was the last time you were caught off-guard by a customer who asked a difficult question or raised an awkward objection?

With a little imagination, you can anticipate and prepare for more than 90 per cent of the questions and objections customers and prospects commonly put forward. This kind of preparation could significantly boost your sales.

In this chapter, we discuss these questions and objections and explain how you can answer them.

### The importance of preparation

You have just delivered your sales pitch and the prospect is impressed. Now, he or she has lots of questions for you. Can you answer them?

The more questions a potential customer raises, the more interested they are in your product or service. However, if you give a wrong answer, this sales opportunity could evaporate.

*“Don't fear objections or difficult questions from the customer. **It shows they are interested.** When you don't hear [questions], you should worry.”*

*Sales consultant*

In the heat of a sales presentation, even an expert can stumble when faced with a complex or difficult question. This is why it's not enough to rely on ad-libbed answers.

A true sales professional creates a list of the typical questions and objections they are likely to face, and he or she then prepares effective responses in advance.

## Quiz time

To help you prepare, here is a list of the top 15 questions customers are likely to ask. This list includes 'killer questions' that could potentially stop unprepared salespeople in their tracks.

**Remember:** Rehearsing the answers to these key questions will help you impress a customer and increase your comfort with, and credibility during, the sales process.

## The most frequently asked questions and objections

### (a) When the customer is exploring alternatives

1. Why should we choose your company?
2. What are the advantages of your solution over others?
3. Why is your solution better than your competitors?
4. Why should we do this now as opposed to next year? Why should we not find the solution in-house?

### (b) When the customer is looking for confidence

5. Who else is using it? Has the solution been bought by others in my industry?
6. Do you have an office in our region?
7. Has the solution been tested, verified or certified by any independent organisations?
8. Can this prototype be piloted?
9. How strong is the financial backing of your company?

### (c) The cost-benefit equation

10. What are the benefits - can they be substantiated?
11. What is the payback or return on investment?
12. Our business/needs is/are different. So, how can this work for me?
13. I question your figures. Can that really be achieved?
14. What is the true cost? There must be other/hidden costs that need to be taken into consideration?
15. Why is it so expensive? What is the total cost of ownership (running costs, etc.)?

### Put this tip into action



**Can you identify which of the above questions are most likely to cause your sales team to stumble? Can you write out sample answers to help your sales team address these difficult questions.**

Your salespeople are also likely to hear questions related to technical or specific details of your product or proposition. Examples include:

- How does it work?
- Is it compatible with...?
- How long does it take?
- How long is the battery life?
- What skills are required?
- What about ongoing maintenance/upgrades/support?

You should add other objections and questions to this list and review and update it with colleagues over time. It's also worthwhile using the collaboration features of your CRM tool to compare answers with colleagues.

## Sticky questions

Based on our experience, most salespeople fear at least one type of question or objection.

This is a question or objection that strikes at the soft underbelly of their sales pitch. It strikes at an area of potential vulnerability or weakness. For example, a newer company may be vulnerable to a question about their financial strength or track record.

These questions can be difficult to answer convincingly and customers are quick to pick up on weaknesses.

Some of these 'killer' questions can stop an unprepared salesperson in their tracks. This is why you should prepare answers that help sales teams reassure customers and give them the confidence to navigate the sales process.

### Put this tip into action



**What is your 'killer question'? Write it down and explore the best answers.**

## Share your wisdom with others

As an experienced sales professional, you may have heard almost all of the questions and objections customer are likely to put forward. This means you have a great opportunity to share your knowledge with the sales team.

Documenting your answers and putting them in an easy to access location - such as in your CRM tool - means your team will have an invaluable resource, which they can consult in times of uncertainty.

## Using questions and objections to increase sales

Here are some tips on how you can use questions and objections to make more high-quality sales:

1. **Welcome any questions and objections that you hear.** They demonstrate the customer is engaged and potentially interested. They also guide you towards key issues, which must be addressed if you are to meet the customer's needs.

2. Before you answer, make sure you **fully understand the question**; if you are in any doubt, confirm the question. If the question is very broad, confirm which specific area you should address first.

3. **Look behind the question or objection.** For example, if the customer asks about price, are they concerned about cost or are they struggling to appreciate value for money?

4. **Need a little more time to think?** If you ask a customer to repeat the question, or if you repeat the question out loud, this gives you more time to formulate your answer.

5. Customers are sometimes impatient; this means you must **get to the point and keep your answers brief.** Talking around the point may give the impression that you can't or don't want to answer.

6. **Avoid answering a question with 'No'.** Instead, use the 'Feel, Felt and Found' technique. For example:

*"I understand how you feel... many customers felt the same way when... However when they implemented this solution they found..."*

7. **Back up your answers with evidence.** You can do this with independent reports, customer and expert statements.

8. **Don't say what you can't do without re-emphasising what you can.** For example:

*"This tool does not include a reporting suite because it has been designed to integrate with the reporting tools that are already used in most organisations..."*

9. **If you don't know something, admit it.** Customers don't expect you to know everything as long as somebody else in your company has the answer and you can find out for them.

## Conclusion

Anticipating likely questions and objections is an essential part of preparing for sales calls and presentations. The list in this chapter of the top 15 objections is useful starting point for your business.

Compiling the best answers to even the most stubborn customer question and objections will help you build a valuable sales resource. Your CRM tool is the ideal place to store and develop this information.

### What's next?



**In the next chapter, we address one of the greatest risks facing sales managers: how to set sales targets and build sales forecasts. In particular, we examine how old fashioned approaches, such as relying solely on spreadsheets, puts managers at risk of being surprised by a sales setback.**

.....  
Sales managers dependent  
on spreadsheets are at  
risk of being shocked or  
surprised by things like a  
setback against a target.  
.....



# Chapter 7: Managing your sales pipeline

## 8 reasons why you can't rely on spreadsheets for forecasting

Excel is a great tool.

It has a wide range of practical uses from creating budgets to building lists. However, no matter how skilled or creative you are with Excel, it has its limits.

You cannot run a sales organisation using Excel or with its sister application Outlook. Managers that try are unknowingly paying a penalty in terms of lost time, limited access to information and ultimately lost sales.

In this chapter, we examine how Excel could be holding your company back. We also present you with 8 compelling reasons why you should take your sales forecasting out of Excel and into a CRM tool.

### 1. You need better forecasts

Spreadsheet-based forecasts are undermined because they don't provide information such as:

- How many leads, presentations or quotations are required to generate a sale
- The number of leads or enquires required to meet a target
- The effectiveness of particular sales and marketing campaigns and the response from different markets or segments
- The volume of pre-sold business and the progress in respect of expected orders
- The number of customers who placed orders during the previous period or during the same period last year
- The number of customers that are spending more and the number spending less
- The average level of discount on sales
- Sales trends by product, by market and by segment.

*"In the last company I worked in, there was a good CRM system. In this new job, there is no system. Going from having a system to having no system is like **getting your first car at 21 and going back on the bicycle at age 26.**"*

*Newly appointed salesperson*

### 2. You can't work with out-of-date information

A spread sheet only gives a snapshot of a point in time and it goes out of date, unless it is updated regularly. For example, forecasts for the next quarter don't update when you reschedule a potential sale that is set to close. This is compounded when sales and management teams use different versions of a particular spread sheet.

*“When there is time I merge the different lists into one and keep one central up-to-date version.*

*It is hard to find the time to [merge our spreadsheets] and anyway I need John’s help as he has a lot of the information and he is on the road most of the time...”*

*Office administrator*

This is where a CRM tool can help. A CRM tool is dynamic and reflects changes in terms of stalled sales and recently acquired business through a pipeline analysis or forecast.

### 3. You need to be grounded in reality

Sales people are by nature optimistic. A sales tool, however, tapers optimism with reality. It provides for a common sales and opportunity ratings as well as close dates. This ensures a more objective standard of completed work and progress in respect of each account or opportunity.

*“Most salespeople are ‘glass half-full’ when it comes to predicting what deals will close. I want them to remain optimistic but there is no value in self-deception when it comes to reaching the target for the quarter.”*

*Sales manager*

### 4. You want to know what to do next

Spreadsheets don’t trigger actions in a diary when an action is allocated to an account or an opportunity. And they don’t provide a record of the associated actions, emails, meetings and so on.

However, a sales forecast prepared in CRM can be interrogated. This enables managers to look at performances against forecasts e.g. by market, product, salesperson, customer or campaign.

### 5. You want to be protected

Spreadsheets are of little use if a sales manager or a **sales rep leaves your company**. The rate of turnover of sales staff means it is vital all account, contact and opportunity data is held in a central repository so that it does not vanish when a rep leaves.

*“What if Angelica had an accident on the way to work tomorrow and could not be at work for 3 weeks?*

*How would we manage?*

*We depend entirely on her to answer customer account queries and to access customer information, such as details of the last order or name of the buyer.”*

*Salesperson*

### 6. You need metrics to track progress

A spreadsheet can’t give a sales manager the metrics they need to build and stand over solid sales forecasts. These metrics include the ratio of leads to orders, the win rate of proposals, and quotations.

Measuring and tracking metrics allows managers to sense-check sales forecasts and to apply an activity-based, or bottom up approach, to forecasting. This means forecasts are based on targeted activity levels, such as the number of leads and sales presentations, the number of proposals and quotes, and historically proven conversion rates.

*“Based on looking at the results from the last quarter, I can see how many sales presentations are required for every 10,000 in new business that we want to win. I know exactly the level of work required and that is really powerful...”*

*Sales manager with a new CRM tool*

### 7. You won’t be prepared for a setback

Sales managers dependent on spreadsheets are at risk of being shocked or surprised by things like a setback against a target.

Managers should not have to spend hours preparing a report in order to know what is going on with a campaign. They should not have to wait until the end of the month for reliable and current sales data.

Managers should be able to see their pipeline at a glance. They should be able to identify priority accounts, opportunities, customers that are at risk, and so on. They need a dashboard of key metrics, which alerts them immediately of a deal that has failed to close or a customer who has failed to re-order. This is why a CRM tool is necessary.



*“Many salespeople dislike preparing sales reports and using sales databases but given its importance it is not a question of choice. It must be included in job descriptions, job reviews and performance rewards. Most important of all, make commissions... based on the records shown within the sales system.”*

*Sales consultant*

## 8. Your time is precious

Managers who track sales with spreadsheets are losing valuable working hours. They are spending time preparing reports and presentations as well as gathering information required for their reports.

Sales team meetings involving the use of spreadsheets are inefficient and often result in line-by-line updates to different accounts. This is time that could be spent discussing ideas for new sales campaigns or promotions.

*“One of the constant complaints that I hear from my salespeople is that they spend hours preparing reports. Despite the time they say it takes, I am still left wondering how reliable the information that they are feeding into the forecast actually is.”*

*Frustrated sales manager*

Using a CRM tool, a manager can see as much or as little, customer, campaign, and opportunity information as is required ahead of any meeting. They don't need a salesperson to tell them what is happening.

### Conclusion

Setting sales targets and building sales forecasts is a challenge. In an environment of constant change, predicting end of quarter metrics isn't easy. This task is made more difficult if you do things the old fashioned way. The message is clear: use spreadsheets for sales forecasts at your peril.

### What's next?



**In the next chapter we ask: 'Do you need a CRM tool?'**

**We explore how using one could help you address your key sales priorities and challenges. We will also ask if a CRM tool can help alleviate some of the frustrations you experience as a salesperson.**

.....  
It is costing you lost sales  
and lost time if you are not  
using an effective sales  
system. It is also causing you  
unnecessary frustration.  
.....

# Chapter 8: Justifying CRM

## How can you justify a decision to use CRM and make the case for CRM to your manager?

In this chapter, we answer these questions and we explore if your business could benefit from a CRM tool.

Rather than listing the key benefits of CRM or the most common reasons for CRM, we ask two simple but revealing questions:

- What are your key sales priorities and challenges?
- What aspects of your job frustrate you the most?

### Addressing sales priorities

To understand the benefits of CRM, you should consider the sales gaps and bottlenecks inside your business. In particular, you should consider the impact removing these bottlenecks will have on sales.

The main benefit of CRM is that it can help you to sell more. It won't do the selling for you, but it will help you fully leverage your skills. A CRM tool can also help you overcome barriers to increased sales.

With this in mind, please complete the following sentence:

My business could sell more if \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Your answer can help you find out how a CRM tool can serve your business. In other words, the roadblocks preventing you from selling more is an ideal starting point for a CRM tool.

*“The secret is to **focus on your priorities in sales... and address CRM directly to those challenges. This way you can get results fast - you can see a payback in terms of additional sales within months.**”*

*CRM consultant*

Every business owner and sales manager has different priorities or challenges. Examples include: leads; the administration of orders; the provision of customer service; and account management. These challenges represent 'pinch-points' or underperforming areas. Addressing these issues will alleviate business frustrations and could improve sales.

The ability of CRM to impact directly on a manager's priorities is one of its key benefits. And if these priorities change over time, the role of CRM should shift accordingly. The primary purpose of a CRM tool is to fix a problem or address a priority for a manager.

## Put this tip into action



**What are the key priorities or challenges you are facing right now? This is the starting point for identifying how CRM can make your life easier and your sales more efficient.**

In 6 months, your priorities as a manager may have changed. Your focus may have moved from leads to prequalification.

CRM tools are designed with this in mind. Once you fix one problem, you can move on to address the next priority. You don't need one tool for leads and another for customer service or account management. A CRM tool can do it all and allow you to adjust your business focus as your priorities shift.

### Addressing business frustrations

When you know the benefits you want from CRM, you can identify how CRM could improve sales. To do this, you should look at the aspects of your job that are frustrating you the most.

A CRM tool can help you overcome barriers to more effective selling. With this in mind please complete the following sentence.

The most frustrating parts of my job are \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Here are some of the typical frustrations salespeople face:

- Mislaidd or lost information
- Spending time searching for contact details
- Chasing poor quality leads
- Paperwork and administration
- Building forecasts and having to explain or justify them
- Reporting e.g. activity logs and sales reports
- Preparing mass email or mailing lists
- Negative feedback from people who have asked not to be contacted or to be removed from a list
- Customer service complaints
- Having to check names to ensure contacts can be contacted i.e. that they haven't opted-out
- Having to connect a laptop to a server to find a simple piece of information
- Scheduling appointments or calls in a diary
- Not having enough administrative support
- Poor quality or out-of-date lists
- Having to call people back because they don't have the correct information
- Having to ask 3 people to find out a simple piece of information such as 'Can I call this company?'
- Wasting time calling people whose credit has been frozen by accounts
- Chasing people to find out what is happening with a customer or prospect
- Long drawn-out or unproductive sales team meetings
- Hearing the business has let customers down in terms of customer service

These are not just pet peeves. They are barriers to your salespeople becoming more productive and efficient. These barriers are also a great way of understanding the benefits of CRM.

*“It is costing you lost sales and lost time if you are not using an effective sales system. It is also causing you unnecessary frustration.”*

*CRM consultant*

## Put this tip into action



**Now that you have listed your key sales priorities and frustrations, you can build an argument for CRM. You should also consider how a CRM tool could address these priorities and frustrations.**

### Conclusion

In this chapter we focused on your sales priorities and frustrations. The objective was to help you answer the question 'Do you need CRM?'

## What's next?



**In chapter 9, we explore the benefits of CRM, as described by other managers. We also pose 10 key questions that can help you understand how important CRM is to your business.**

.....  
Imagine an accountant without an accounts package or an architect without a CAD programme. Sales people deserve to have tools to make their jobs easier, just the same as architects and accountants.  
.....



# Chapter 9: The business benefits of CRM

**In the last chapter, we considered your sales priorities and frustrations. Our objective was to help you answer the question: 'Do you need CRM?'**

This question goes to the heart of CRM and how it can help you sell more.

In this chapter, we discuss how other managers have benefitted from CRM.

## Top 10 questions

Below is a list of the popular benefits of CRM. You can use this list to conduct a mini-audit of your needs.

- 1: Do you ever get frustrated searching for customer and prospect information?
- 2: Do you want to feel more in control of sales?
- 3: Could you work smarter and not harder?
- 4: Are you surprised by sales setbacks?
- 5: Could you improve your marketing strategies?
- 6: Are your customer records safe and compliant?
- 7: Could your team share ideas and information more efficiently?
- 8: Are you going to add new team members?
- 9: Are you competing on customer service?
- 10: Do you want to be more productive outside the office?

There are 10 questions listed above. The more of them that apply to you, the more you will benefit from a CRM tool.

*“Imagine an accountant without an accounts package or an architect without a CAD programme. **Sales people deserve to have tools to make their jobs easier, just the same as [architects and accountants].**”*

*CRM consultant*

### Benefit question 1

#### Do you ever get frustrated searching for customer and prospect information?

A CRM tool leaves nothing to chance. Through CRM, salespeople and their managers can identify neglected accounts, leads that need to be followed up and opportunities that require more work before closing.

A salesperson with access to up-to-date customer and prospect information can make more high-quality sales calls. As a result, they can increase the success rate of calls and presentations.

Better information enables managers and staff to make decisions about what calls to make and where to focus their efforts. This information enables them to identify areas that deliver the greatest results e.g. products, markets, customers.

### Benefit question 2

#### Do you want to feel more in control of sales?

As a manager, a CRM tool enables you to see what is happening and to predict what is going to happen through in-built forecasting tools.

- CRM tells managers exactly how many sales calls, presentations and quotations are required to reach a target as the month, quarter or year progresses.
- CRM makes the levels of sales activity and effectiveness more visible by showing what works and what doesn't.
- CRM tracks the effectiveness of sales and marketing campaigns and shows the source of new business and customers (including those who are and are not spending).

With a CRM tool, you can take action fast. You don't have to wait until the next quarter or the next sales meeting.

### Benefit question 3

#### Could work smarter and not harder?

We are all under pressure to get things done.

A CRM tool can make people more productive and efficient. Specifically, it can reduce the time spent on activities like:

- Administration and paperwork
- Building and maintaining lists
- Searching for information
- Scheduling calls and managing diaries
- Preparing for calls and presentations
- Attending to marketing administration
- Reporting, internal meetings and reviews
- Issuing quotes

These tasks are often a source of frustration among salespeople because they see these tasks as non-value and as distracting from their real job of selling.

A CRM tool will generate some initial additional work but once it is up and running, it should take no more than 30-60 seconds to update following a customer call or sales presentation. A CRM tool gives your salespeople more time to sell because it reduces the amount of time spent creating lists, gathering information and searching for files.

A CRM tool can reduce reporting time by up to 50 per cent by eliminating the frustrating work of: manually compiling written call sheets; cross-checking spreadsheets; and cross-checking requests for activity updates.

Busy reps also benefit from useful CRM functions like integrated email, document storage, task management and diary reminders.

#### Benefit question 4

##### Could you improve your marketing strategies?

A CRM tool increases the accuracy of sales targets and forecasts. It enables forecasts to be built on better underlying information and to be kept up to date. A CRM tool also reflects any changes in underlying data immediately in forecasts (e.g. a won or lost deal). This allows the manager to continually review progress against a forecast or target.

A CRM tool applies more rigors to the forecasting process and it reduces the level of subjectivity involved. It provides for a common sales language (e.g. when is a hot prospect 'hot'?). A CRM tool also uses more objective criteria and clearly defined sales stages when setting the probability and timing of sales.

#### Benefit question 5

##### Are your customer records safe and compliant?

Imagine being able to send your customers and prospects an email or direct mail about a new promotion or product range at the click of a button. And imagine being able to track response rates. This is exactly what a CRM tool accomplishes.

Using a CRM tool enables a sales-led approach to your marketing. It facilitates a switch from expensive mass marketing (e.g. advertising and events) to more measurable direct or one-to-one contact with your target customers. A CRM tool makes marketing results more measurable and aligns results against your sales goals.

If you are worried about being left behind by social media, a CRM tool enables you to keep up. You can capture the LinkedIn, Twitter and Facebook details of customers, and you can capture enquiries and develop a capturing a more effective digital and social media marketing strategy.

#### Benefit question 6

##### Are your customer records safe and compliant?

Your customer data, sales records and marketing lists are business assets. Like any valuable assets, they need to be protected.

Useful information should be stored somewhere safe, secure and accessible for your staff. However, as we previously discussed, customer and prospect information, which is kept on paper or in spreadsheets, is vulnerable and insecure.

Occasionally, an organisation glimpses how dangerous it is to operate without a proper means of storing customer and prospect information. This can happen when a salesperson takes holidays or starts working for a competitor.

What would happen to your customer records, enquiry logs and marketing lists if:

- Your laptop was stolen or a computer hard disk failed
- A competitor hacked your computer system
- You had to undergo an audit of your compliance with data regulations
- A fire damaged your premises and you lost your paper records

Some of these events, particularly the last one, have implications for the future of your business. They are business continuity risks.

A good CRM tool can keep your customer and prospect data safe and secure. It can prevent this data from being, mishandled, hacked or stolen. In addition, it can help you comply with new and emerging data protection standards.

#### Benefit question 7

##### Could your team share ideas and information more efficiently?

Many organisations adopt a 'lone ranger' approach to sales. This means one or two key people hold the responsibility for customer information. This is a problem when a business grows and when it adds staff.

In many companies, silos separate sales from account management, logistics and delivery and even marketing departments. This causes problems when only a salesperson is able to answer a customer query or when a salesperson needs to be directly involved in the processing of an order.

A CRM tool maximises collaboration between sales, marketing accounts, operations and logistics, customer service and other departments in your business. You can also use a CRM tool to engage with partners or resellers.

A CRM tool makes information widely available, shares tasks and helps your organisation to work more effectively as a team. It ensures company-wide access to shared information and facilitates the sharing of ideas and the tracking of requests, activities and cases.



## Benefit question 8

### Are you going to add new team members?

Growing businesses must rely less on their founders and more on the systems and structures for success.

A good CRM tool makes building and managing a sales team easier. You can use a CRM tool to delegate various sales activities as your team grows.

Here are some examples:

- **A new salesperson can get to work quicker** with a CRM tool that provides target customer information and account histories.
- Managers can see which customers have been called. They can see the results achieved by different members of the sales team, the activity levels and the conversion rates. This **enables them to manage the performance of different members** of the sales team.
- Managers can become better managers because they have **access to all relevant information** e.g. the results of meetings, the status of opportunities, the status of customer enquiries etc. This means managers can focus on transferring enthusiasm, knowledge and insights when meeting with salespeople.
- **What gets measured gets done;** a CRM tool generally results in an increase in the levels of sales activity and it can act as a spur for individual salespeople to sell more efficiently.

## Benefit question 9

### Are you competing on customer service?

Savvy sales managers know it is easier to keep a customer than to find a new one. They also know finding new customers simply to replace old ones is a fool's errand; hence, the importance of customer service and retention.

A CRM tool can help you to consistently deliver a level of customer service that separates your business from competitors.

It can help you ensure customers are not left waiting for a response. A CRM tool alerts the salesperson and support person to calls, responses and issues that need immediate attention. It also warns when these tasks are overdue.

Here are some other ways a CRM tool can help you manage customer service and support. A CRM tool can:

- Reduce the amount of time spent answering customer enquiries or support calls
- Improve customer experiences
- Resolve customer complaints faster and prevent them from reoccurring
- Promote special offers to your customers
- Earmark your most important customers for special service (e.g. gold, silver and bronze designations)
- Analyse, manage and track customer service and support calls, by source, timing and outcome
- Ask your customers to refer you to potential leads

## Benefit question 10

### Do you want to be more productive outside the office?

Whether you are on the road or at the airport, you should be able to view customer information, check on the progress of a customer order and find out which customers you need to call. You can do this with a CRM tool.

You can use your favorite mobile, tablet or any other device to access the information you need, when you need it. Because your information is stored securely in the cloud, you don't have to endure slow or complex remote access protocols or logins to a server at your office.

## Conclusion

Some managers want a CRM tool because it gives them greater visibility and control over sales. Some managers want a tool to boost their marketing initiatives or customer service.

Other managers want CRM to manage customer and prospect information more efficiently. The question is: which of the many benefits are most important to you and your business?

# Conclusion

Successful business people are always looking for new ways to do things better. They want an easy way to tackle the frustrations of preparing sales forecasts and reports, managing their opportunity pipeline, and attending to the paperwork and administration that keeps them from their day job - selling.

In this eBook, we shared our business insight alongside some techniques you can apply to your business and use to achieve more sales.

We believe you deserve the best tools. We know a CRM tool can help you save time, reduce paperwork and provide you with greater visibility and control over key sales activities.

The tips in this eBook are based on the advice of your peers and the growing body of international best practice about effective selling. We didn't include these tips because they make a case for CRM; we included them because they are proven to boost sales success.

Many of the tips presented in this eBook challenge the work practices of managers who are dependent on paper lists, Excel spreadsheets and Outlook. These managers need to find a better way. These managers deserve to know how CRM can achieve sales success.

If you have had a bad experience with an IT solution, it is time to put this experience behind you. In this era of tablets, smartphones and mobile apps, companies that adopt the latest tools will leave their competitors behind.

You can leave your competitors behind.

## About the authors

Ray Collis and John O'Gorman are authors of The B2B Sales Revolution and other books. Collis and O'Gorman are successful sales consultants with The ASG Group, and they are global leaders in sales performance management.

For more information on the ASG Group, please visit [theasgroup.com](http://theasgroup.com).

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Sage has been working with small and medium sized companies for over 30 years. We have helped thousands of businesses to acquire, retain and delight their customers and achieve their business ambitions.

Over 14,000 small and medium sized companies across the globe use Sage CRM every day to accelerate sales, increase their business productivity, and make every customer interaction count. Sage CRM is used by successful, growing companies seeking new ways to interact with customers, leverage the power of social media and take advantage of the latest mobile developments to grow their business.

When combined with Sage ERP, our customers enjoy better business insight, greater efficiencies and productivity, and a single, customer-centric view across their entire business. So whether you're just starting out or have already grown to several hundred employees, Sage CRM can help accelerate your business success.

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