

Plan The Process: A Multi-Phase Approach by: Fran Berman

All too often, organizations lose valuable time, money, and work hours in projects that are poorly executed. Whether you want to effect change through team building, management development, sales force automation, or even new software, effective implementation can mean the difference between success and failure.

Let's use sales force automation (SFA) as an example. AST Computer automated its salespeople in 1991 with the SMART (Sales Management and Resource Tracking) System. The SMART System was a complement of three applications specific to salespeople. First, electronic mail allowed them to communicate with the corporate office anytime, anywhere. Next, contact management software gave them instant access to customer records for better account management, a scheduler for better time management, and other functions that improved their reports to management. Finally, the Information Services department created a custom program that kept the salespeople updated on each customer's order backlog and shipments, as well as detailed product, price, and competitive information.

The first periodic survey of sales people showed they saved up to 11 phone calls and 3 hours each week in administrative tasks, retrieving information, and resolving problems. They spent half of this time with customers and the balance learning more about their products and competitors. Because of this success, AST expanded the program in 1992, and released a modified version of it

to some of its resellers. Those who used the system reported saving 6 phone calls, and 3 hours each week in the first year.

What were the keys to success? What model did they follow?

In their book Management: A Book of Reading, authors Koontz, O'Donnel, and Weirich define the communication system within an organization in seven phases: Inputs, planning, organizing, staffing, leading, controlling, and outputs. AST followed a similar although not identical multi-phase approach.

Inputs

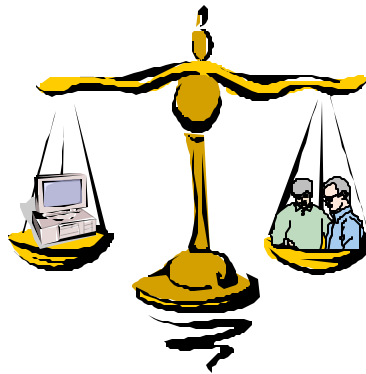
Management was dissatisfied with the quality of information it was receiving from the sales force, and the time involved to get it. When territories changed or salespeople left the company, important account information often disappeared. Salespeople complained of time-consuming reports and administrative duties. AST had the technological resources available. The company also realized the need to use the same

technology it was selling to its customers, to "Walk the talk."

Planning: Setting Goals and Objectives

In any company, the sales force may be most interested in reducing time spent on administrative duties, increasing time with customers, improving time and territory management, and working smarter, not harder.

Not People vs. Technology



It's People And Technology

Management may be focused on increasing sales, streamlining communications, and maintaining control. The organization's goals may encompass maximizing return on investment and decreasing cost of sales, thereby increasing net profits. While the hierarchical levels may have different goals and objectives, they all share the need for complete and accurate information, promptly delivered.

What were AST's goals? They were fairly simple.

- Give sales people more selling time
- Improve the availability of customer data for sales and management
- Facilitate information flow between sales and management

What did we achieve? Everything we set out to, and more.

- Increased efficiency and effectiveness
- Reduced duplication of efforts
- Enhanced customer satisfaction

Organizing Resources

The company selected task force members from key stakeholders. A three-way team representing Sales Training, Information Services, and sales management planned the process in a multi-phase approach, with Sales Training as the liaison between the other two. With six years in the sales at AST and six years in sales previously, I was the newest member to the Sales Training department, and the natural choice for this project.

After reviewing the goals, we lined up both internal and external resources, and developed checklists and priorities. Through all phases, we consulted with various sales people and the departments with which they interacted. After all, no one likes it when decisions are made for them. Making users part of the decision-making process improves the potential for acceptance.

Assessing Needs

First we determined where we were and where we wanted to go. We looked at information flow and work patterns, used written and telephone surveys, and monitored salespeople's behaviors on joint sales calls. We asked management what their expectations were, and asked the salespeople what they wanted.

Once we had done that, we were ready to design the system.

Development

Before anything else, we developed our schedule and budget for development, hardware and software investment, and training. We then defined and secured both the human and the technological resources, and developed partnership with our software suppliers. As the hardware manufacturer,

we worked closely with our product managers on features and delivery.

Information Services paid close attention to back office data maintenance. In other words, they made the process of compiling the data and distributing it to the salespeople as automatic as possible. They designed the software with easy-to-use menus and screens, and consulted sales and sales management throughout development. After writing the program code and building the mechanism for accessing the data, we conducted careful beta testing and a pilot program.

As we moved forward, we uncovered obstacles and developed strategies for overcoming them. For example, we built support by involving related departments. To win over the skeptics, we enrolled and empowered project supporters. They converted many non-believers, and influenced others to at least a neutral position. Still, to say that we had no opposition at roll-out would be stretching the truth.

Sales Training wrote the documentation, which included screen captures, menu maps (flow charts), sample printouts, and troubleshooting tips. We knew that salespeople don't like a lot of paperwork and may not read the manual in depth, so we also created a quick reference card for the custom application and a keyboard template for the contact management software.

Hands-on Training

The pilot program helped us determine the training objectives, the skills necessary to meet them, and the minimum acceptable levels of competency. The company that supplied the contact management software helped us customize the program and conduct the training.

Before training took place, Information Systems installed the programs and shipped the new notebook computers to each training site. During our 60-day training schedule, we went to every domestic sales office for a full day of training. In the first hour of training, we introduced the goals and objectives, assigned systems, registered users, and familiarized them with the dos and don'ts of using the hardware. To make the training meaningful to the salespeople, we created a sample database with real data and names changed to protect the guilty. To make it easy, we gave each person a detailed user's manual, quick reference card, and keyboard template. The training team consisted of one person from Sales Training and someone from the Information Services development team. The sales trainer conducted the training. The programmer was available to fix any unexpected technical problems, which turned out to be a wise move.

We tested for mastery using exercises, and made it fun with a contest. After all, salespeople thrive on competition,

so why not use it to our advantage? During the initial roll-out, we announced at the beginning of each training session that the day would end with a contest: The first person to give and demonstrate the correct answer would win \$5 cash, on the spot! The contest was a hands-on quiz on the ten software functions they would need to use most. The first one to raise her/his hand would have to stand in front of the group and demonstrate the technique. If s/he was wrong, there was no shortage of eager volunteers to take her/his place. This worked like magic by holding their attention and enhancing retention.

Every three months we rolled out another module using the same hands-on approach. We should have reviewed the previous module to reinforce learning and address the salespeople's issues and dislikes. But time constraints and internal issues prevented us from doing so. Instead, we trained strictly on the new module. Everyone used all the programs to varying degrees that, when graphed, created a skewed bell curve with more users at the low usage end and a few "technoids" at the high end. We remedied this later in the evolution of the SFA process.

Maintain and Measure

To maintain momentum and support, we included SFA at the quarterly training events for new sales hires. We published a quarterly newsletter to update our customers on changes and enhancements and remind them of ways to use the system to increase productivity. We included technical tips to either solve or avoid a problem, and reported success stories of how someone closed a sale using these new tools.

To measure and report our progress, we conducted written surveys before automation, six months after the initial roll-out, and once a year thereafter. The surveys told us what the salespeople were using and how often, how much productivity they saved or lost, and what else we could do to satisfy the needs of our customers, the salespeople. Management received the survey results with quantitative and qualitative return on investment figures.

Modify and Enhance

There were several direct results from conducting these surveys. We replaced the cumbersome, cryptic electronic mail system with one that was Windows-based and much more user friendly. We enhanced print functions where they did exist and added them where they didn't. Salespeople complained that the mechanism for delivering their data to them was very slow, which we could not remedy right away.

As sales force automation evolved, we replaced the contact management software with Lotus Development Inc.'s "groupware" product, Lotus Notes. This became the basis for our worldwide customer database. But now the salespeople complained about the inconvenience of having

to dial in three times: once for electronic mail, a second time for Lotus Notes, and yet a third time for their customer shipment and order backlog information. Three separate phone calls also cost us extra money in telephone time. We consolidated two phone calls into one by sending each salesperson's files to her/him via electronic mail using high speed modems. Our costs went down and our users' satisfaction and utilization went up. The praise we heard was deafening.

This brings us right back to the beginning of the process, using the input to plan, organize, and continue to provide products that benefit our customers.

Summary

If experience is the best teacher, then we learned very well. We built in these important steps:

Make sure management is behind you. More specifically, actions speak louder than words, and that applies to management. If management demands participation by the sales force and excludes themselves, the salespeople will not take the project seriously. Building management tools into the SFA project raised our level of success.

Formally announce the project. Create anticipation by marketing the benefits the sales force and management will reap. This worked particularly well with new modules and upgrades.

Make the salespeople accountable for using the new system. The Sales Training department changed the new hire training to cover a different area of SFA each day. Homework assignments based on the day's lesson and related to required job skills gave the new hires a chance to experience real-world system use, ask questions, and resolve any issues before going into the field.

As stated earlier, we achieve everything we set out to, and more.

- Increased efficiency and effectiveness
- Reduced duplication of efforts
- Enhanced customer satisfaction

In the first six months, salespeople reported saving up to 21 phone calls and 4 hours each week in administrative tasks, retrieving information, and resolving problems. They spent one and a half hours more per week with customers, and the same amount of time researching competitors and their own products. In their first year using the system, resellers reported saving 11 phone calls and 7 hours each week doing business with AST.

Whether automating your sales force or training the general work force on soft skills, the basics remain the same: Plan the process with a multi-phase approach to ensure real learning and long term change. ☐