

Take Your Time

Sales force automation will work most effectively when a company phases it in.

When it comes to automating a sales force, patience is a virtue.

The potential payoff from sales force automation (SFA) can be so dramatic—20 percent to 40 percent boosts in productivity are not unusual, according to Sales & Marketing Management's annual PC surveys from 1986 through 1992—that companies sometimes force-feed it to their sales reps, hope to cash in quickly. But such a course can be dangerous, because computers often represent a whole new world to salespeople, who can devote only limited time to learning about them.

"An evolutionary process best assures success in computerizing a sales force," says Fran Berman, senior training specialist for AST Research, Inc., in Irvine, California. The computer maker deliberately stretched its own SFA program over a three-year period when it switched its 100-plus sales reps from desktops to notebook-type laptops. "Sales-people do best at selling, not learning to become computer jocks," she adds. "Giving them too many soft-ware applications at once would be instant overload and would ensure failure. By giving them a little at a time, we allowed them to digest it properly and learn how to apply it to their job before they go to the next [application]."

AST's patience is paying off. Sales reps tell Berman they're making 11 fewer phone calls a week to get information for customers, thus spending three hours more per week with clients. Other benefits, as



AST Research's salespeople are spoon-fed—not force-fed—automation, says senior training specialist Fran Berman (left).

revealed by the semi-annual surveys AST does to gauge its SFA effectiveness, show: information is more timely, customers are more satisfied because salespeople are better informed, and there's a better flow of information between reps in the field and branch management.

Ironically, while AST took its time in computerizing the sales operation, that hasn't stopped the marketer from taking an innovative step that others are likely to adopt in the future: supplementing the laptops with hand-held Personal Digital Assistant-type devices. The pen-based unit has a scheduler, Rolodex, slots for the new PCMCIA storage cards, and communications, and infrared capability.

"There are times when the notebook, small as it is isn't convenient,"

says Berman. "The reps use the hand-held device at such times when they want to record important activities, for example, which can be transferred later on."

When AST began the switch to laptops in spring of '91, a contact management package, ACT!, was one of the first software applications (along with Higgins E-Mail and FoxPro for order-taking purposes) installed on the machines. ACT! allowed reps to "track their customers daily, remember important phone calls and meetings, and report what was going on," says Berman. "ACT! had a very good calendaring program, which enabled the reps to improve their time management."

Each calendar quarter, an additional program was installed. Mostly written in-house, the software covered customer orders, shipments, backlogs, communications, and, eventually, competitive information. More recently, off-the-shelf software, such as Microsoft Word (word processing), Excel (spreadsheet), and PowerPoint (presentations) were added to the reps' tool kit.

At the time of the changeover, Berman recalls, the primary SFA goals were "more accurate information on a timely basis, improved

information flow between management and reps, and improved time and territory management.” Those goals remain paramount today, with one significant exception. Like many other marketers, AST was so preoccupied with making automation work for the reps’ benefit that it overlooked the potential management benefits. To correct the omission, AST replaced ACT! with Lotus Notes.

As Berman explains, “Management was not able to get the information they needed on customers and progress within the sales cycle because ACT! does not have a dial-in capability. Thus, the information never moved beyond the reps’ notebooks.”

In contrast, Notes has a seamless dialup: each time a rep dials in with a modem, the software uploads the updated portable-based information (call reports, for example) to a central computer, and downloads new information (price changes, for example) from the host computer to the rep’s machine.

“We are now able,” she says, “to change the appearance and nature of reports to suit the manager, for example.” One of the first applications written for managers was a reporting system that presents sales summaries and graphs them for quick visualization of important trends.

As the SFA program moved through its three-year cycle, Berman visited field reps at least once a quarter to solicit feedback on their reactions. Two themes that consistently surfaced, she recalls, were “ease of use on the software side, longer battery life on the hardware side.”

From the start, “We made sure the software was user-friendly,” she says. From a hardware perspective, the

company has replaced the AST Premium Exec (60 meg and three to four hours of battery life) with the Power Exec, which has up to 340 meg and six-and-a-half hours of battery life.

Needed: Database for Multiple Sales Channels

As companies increasingly use multiple sales channels to reach targeted markets, there’s greater need for computer-based systems that will improve the coordination and communication of marketing activities. So contends Jerry Goldstein, president of Market Makers, and Atlanta marketing consultant, in a recent issue of *In Control*, a newsletter published by Brock Control Systems.

Because sales, marketing, and customer support each have their own life cycle and functional requirements, he says, “multiple sales channels require a central nervous system of prospect and customer information.” Where marketing focuses on creating awareness, sales concentrates on tracking sales opportunities through an evaluation process. “Customer support is interested in information needed to support the customer base,” he adds.

All three functions will interact more effectively if their needs are supported by “a single database of suspects, prospects, and customers,” Goldstein says. The database, he suggests, should do three things: 1) analyze where and why you have been successful; 2) analyze where and why your competitors have been successful; and 3) determine the best new opportunities.