

A large, dark grey arrow pointing upwards and to the right, with a slight zig-zag in its path, set against a dark blue background.

GET THE MOST OUT OF SALESFORCE WITH ETW

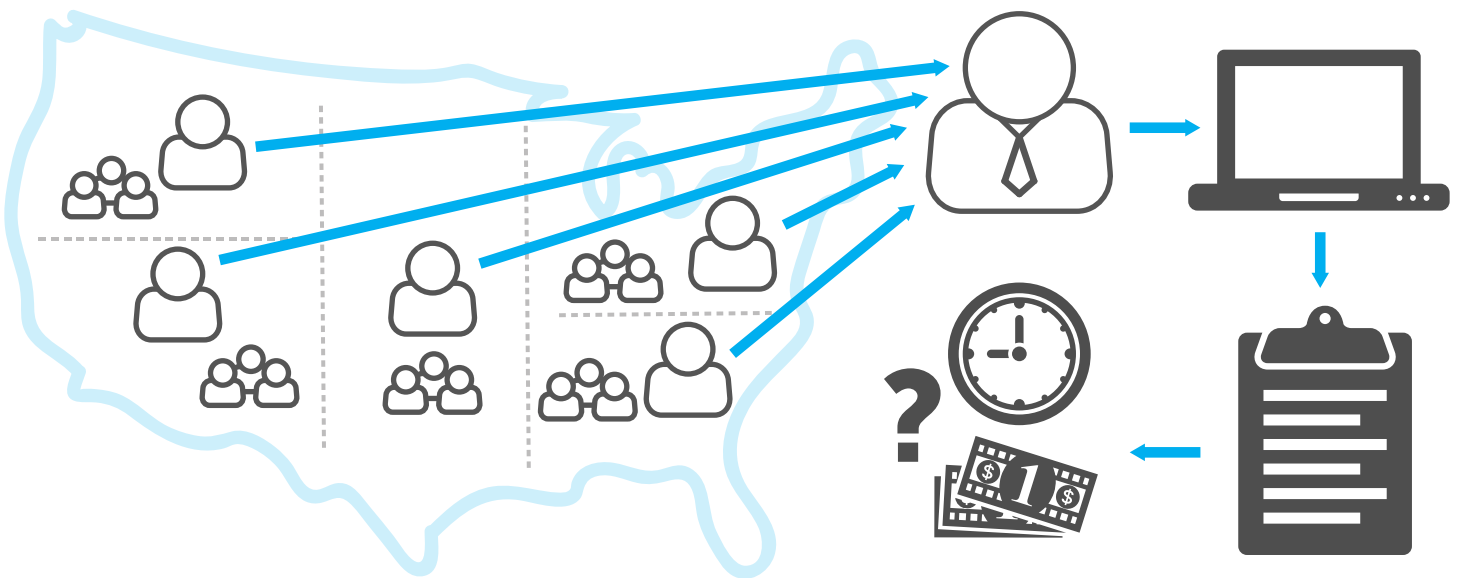
How to increase the ROI of your
Salesforce System using ETW

E-BOOK

We see this scenario on a regular basis with our clients...

An organization with a distributed workforce has a management structure with one senior leader responsible for the performance of the entire country, having several direct reports split up by region. Those regional leaders in turn each manage teams by state or sub-region and their teams in turn get more granular resulting in two or more levels of management per region.

They strive to use Salesforce consistently to track critical measures like sales, pipeline, margin, referrals, key accounts etc. Each team-lead, supervisor and manager is expected to regularly meet with and help keep their respective teams focused on the different parts of the sales and support cycle in their regions.



CLIENT SUCCESS STORY SNAPSHOT:

With 125 locations, cross-region transparency and accountability was lacking for Air Evac Lifeteam. With the introduction of ETW, they would increase data sharing across regions, leading to exceeded key target metrics within 5 months.

TESTIMONIAL:

“ I now have monthly meetings with my five direct reports. I can look at a region and see what bases are performing well and which bases need attention. For bases that are performing well I can dig in and see exactly what the manager is doing to achieve the results.”

JOE GRYGIEL
Senior Director of
Operations,
Air Evac Lifeteam

Daily, weekly or monthly, leadership meets, reviews the numbers, sales, pipeline, estimates and have meetings that feel more like report-out sessions with the regional managers. Typically there is limited value in these very expensive and time consuming meetings beyond an occasional inquiry to ask why the numbers are not being met.

This is how many organizations operate, using Salesforce as a central hub to manage activity and collect and report out data, but there are huge opportunities that are missed by not utilizing the ETW process in conjunction with this process.

MANAGING SALES & PIPELINE GOALS USING SALESFORCE & ETW

In most organizations, Salesforce is used to manage the customer journey from prospect to close. Pipeline is viewed as a key lead indicator to the closed sales the organization will have at any given time. Many organizations will assign sales goals to individuals and manage respective pipeline goals as well to support that level of sales.

As an example, if a salesperson had a sales goal of \$1MM and an expected 1:10 close rate of their pipeline, that same salesperson would be given a pipeline goal of \$10MM so the resulting closed sales would be equal to the sales goal.

The manager of a sales team will then use Salesforce to watch these numbers closely to manage results and meet with the team and individuals as needed. The assumption is that meetings are happening regularly and that if a manager wants to do a deep-dive into what is or is not working they will navigate Salesforce and find the information they seek.

The challenge is that Salesforce is structured around deals or contacts in a very transactional and tactical manner. This structure does not make it easy to discover and manage macro trends, best practices, competitive intelligence and effective coaching.

The ETW Process supports and enhances Salesforce by first establishing a standard cadence (weekly to monthly) of team meetings and one-to-one meetings between employees and their managers. This process drives employees to provide a strategic summary of the things they are focusing on to get better results in achieving their goals. The technology captures these high level summaries along with the feedback managers are giving employees in context to their respective goals to drive accountability.

The ETW system enables this information to get filtered up to management and become available for regional leaders to view and explore. This process results in the discovery of macro trends, sharing of best practices, competitive intelligence and development and coaching of employees to think more strategically as explained further.

MACRO-TRENDS

Without a regular cadence of meetings at all levels of management in a region, leadership is limited to a very shallow summary of what is going on based on the cherry picking of subjective information from a manager's manager's manager. This information is often diluted, biased and not very specific.

With the ETW process, managers can drill down and understand the thinking behind all of the numbers at different levels of the organization to find their own trends and the reasons behind them, allowing them to see if they are truly pervasive.

IDENTIFY AND SHARE BEST PRACTICES

Organizations that are split into regions tend to be siloed by region by design. It is only the leaders of each region that may have an opportunity to share best practices during very high-profile senior leadership team meetings that are typically not the best forum for taking risks, making assumptions or asking for help. By using the ETW platform, you can enable leaders to have access to what is and is not working in other regions to quickly adopt best practices and spread them across the enterprise. Additionally senior leaders can reach out and help those in need and commend those who are getting excellent results easily and transparently.

Real customer examples

Regional managers of a large multinational organization were responsible for driving a targeted number of referrals from existing customers as part of their growth strategy.

During leadership meetings regional managers said they were driving the initiative with their teams. The VP of Sales met with each of the 5 regional managers during the monthly one-to-one meeting to really understand how the referral initiative was being driven to front-line salespeople in each region.

ETW allowed him to find the details behind the numbers that Salesforce provided as to the most effective tactics that one manager was using to achieve incredible success with referrals. This was shared with other Regional Managers at the next leadership team meeting.

ETW also uncovered that although one Regional Manager said she was driving referrals, there was no evidence of such a push and no activity showing it was even a priority for that particular sales team.

This detailed information and these discoveries were much more valuable than just the metrics Salesforce provided management.

A salesperson shared in their ETW update that one thing they were doing to improve the quality of their pipeline and increase their closed sales ratio was to target customers that are located along their product's main shipping routes.

This enabled competitive pricing due to reduced shipping and resulted in a practice that was adopted in other regions to increase sales.

Real customer examples

A highly fragmented multi-state and multi-location salesforce system had been utilizing diverse tactics and methods for sales and marketing that were localized. The spectrum of activities ranged from customer appreciation T-Shirts to Barbecues.

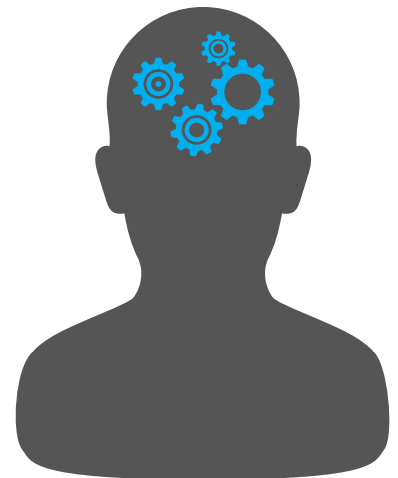
Salesforce provided no concrete connection as to what marketing efforts or tactics were most effective. It was only after the ETW platform was introduced that a few key practices were identified as being effective in multiple locations and subsequently adopted as a mandatory best practice across the organization.

ETW is now used to ensure that these practices are being implemented and results have improved dramatically.

COMPETITIVE INTELLIGENCE

Salespeople are the front line when it comes to what competitors are doing. These findings often don't get the attention they need at all levels of management which can result in missed opportunities.

ETW enable the sharing of competitive intelligence by region or across the enterprise in real time so that products and services can be adjusted accordingly to stay a step ahead of the competition before it is too late.



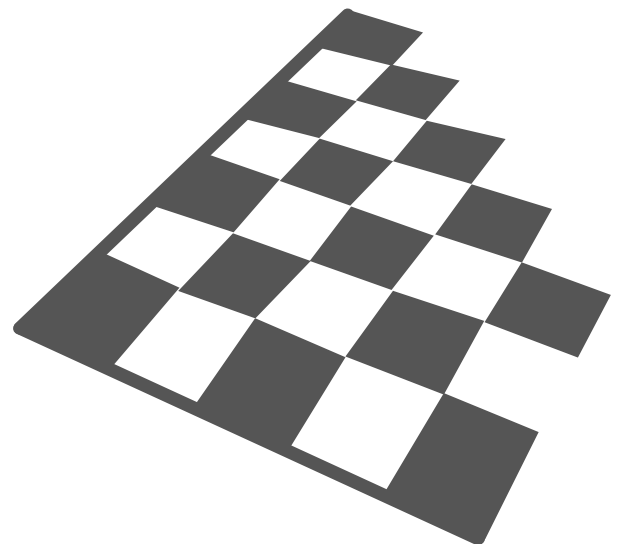
Real customer example

A B2B salesforce often sold to customers that had presence across multiple regions. An update in ETW that provided insight into a competitor's new approach for a particular existing customer in one location was quickly shared with the organization and allowed a quick pivot for the sellers in other locations to prevent loss of business.

This information was also in Salesforce but without the ETW cadence and process, it would have likely never been uncovered in the context of relevant competitive intelligence to be shared with leadership.

STRATEGIC THINKING AND COACHING

If a Salesforce report shows two salespeople in the same role are getting vastly different results, how do you know what is and is not working? If a manager says he or she is focusing the team on increasing pipeline, how do you know if this is accurate or how the team is being led or managed? This information and coaching does not live in Salesforce. There is no way to see the consistent coaching and development that is occurring or being neglected.



Using the ETW process in conjunction with Salesforce enables managers to see the high level strategic thinking of each employee as they navigate their daily activities on their mission to get results for the organization. Understanding what an employee is going to focus on next to get results provides valuable coaching information for the manager. If they are focusing on the right things, a manager can provide additional support in that direction. If they are focusing on the wrong things, it is a great coaching opportunity to understand their thinking and course correct early. Sometimes employees don't know what they can do to improve their goal which also provides a great coaching moment for some perspective. All of these processes are the critical next step beyond just knowing what the numbers are, or who called whom when and what the next planned meetings are.

STRATEGIC THINKING
AND COACHING:

Real customer example

An organization that was going through multiple acquisitions had a mixed management team. Some managers were very experienced, others were new or "green", and there was no consistency in how or how often they met with their teams.

Meetings were more tactical about closing a sale or solving a specific problem and there was no investment in developing talent to think more strategically. Turnover was high because employees had no clear sense of what their goals were and they were also not being coached or developed on a regular basis.

The company used Salesforce to provide them sales and pipeline information in real-time but sales were down significantly from the prior year. When the organization implemented ETW in conjunction with Salesforce, they were able to marry the data from salesforce with the management discipline that ETW established in order to drive double digit sales growth consistently for years.

CLIENT SUCCESS STORY SNAPSHOT:

A \$3B+ global chemical distribution organization was facing high employee turnover, organizational changes, and challenges communicating strategy to all levels of the company. With the implementation of the ETW Management Process, the organization successfully built out an execution plan with the senior leadership team. Major objectives were created, and performance requirements were linked to strategy.

TESTIMONIAL:

“ ETW has proven to be critical to our success because we now have a system which allows us to create a precise business plan, divide the key elements of that plan up between key players then ensure each player and their teams focus on execution of the plan.

RAY COOK, CHMM
Operations Manager,
US ChemCare

As an additional bonus, using ETW as a communication platform and syncing tool prior to those all-too-frequent but not-so-productive report out session meetings allows managers to be on the same page prior to the meeting and enables senior leadership to curate and discuss only those topics that are relevant for all attendees to be aware of.

ETW will not replace the ever growing central database of activity which is Salesforce, but it will enable managers to get the truly useful data of why a particular strategy is or is not working and leverage that information across the enterprise through communication, transparency and collaboration to get better results and develop a more strategic and effective sales and support team.

Salesforce is best used as the platform for documenting activity and generating metrics, ETW is better used for taking that information and integrating with management process to capture useful insights.

About ETW

ETW provides a platform to track, evaluate and measure employee performance against the major objectives of the organization. Easily execute and translate long-term strategy into clear, actionable goals. With ETW you can effectively communicate the company's roadmap to success and engage everyone throughout the organization with that roadmap. Using ETW your organization can connect employees to strategy and culture to drive sustainable winning results.



EXECUTE TO WIN

Business Operating System
for the Modern Enterprise
www.etw.com