Top CRM Functions Requested by Sales Professionals

COMPARE BUSINESS PRODUCTS

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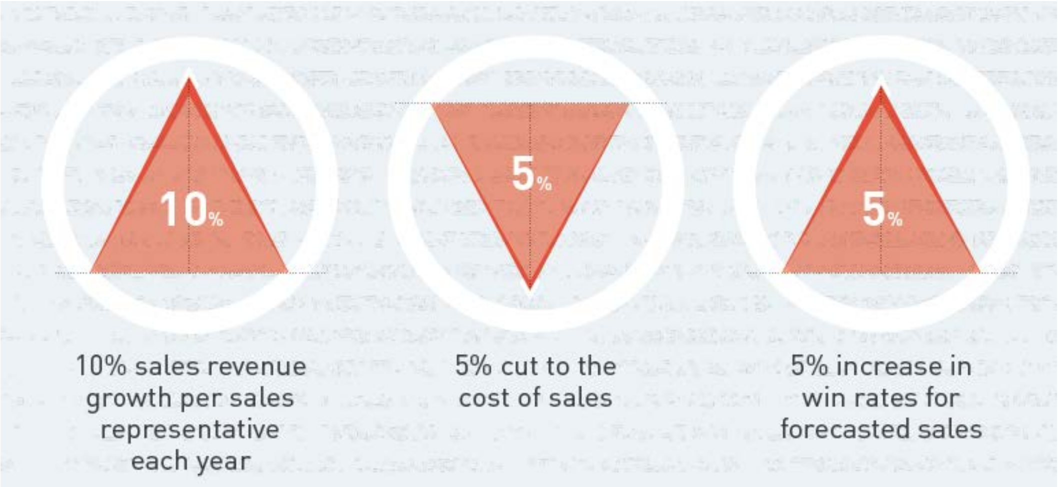
Introduction

CRM has many excellent benefits, and a lot of these are achieved through leveraging the efforts of the sales team. The sales team is integral to the effective roll out of a CRM system, because sales people generate leads that are converted to customers in the system, and beyond this, the same data will be managed and utilized within the CRM system by both marketing and customer services teams. Getting it right during the sales process is fundamental. This means that sales people need to be encouraged to use the system properly from day one. This is far more easily achieved if the sales team is getting functionality that it needs from the system, than if the system does not really serve the needs of sales people very well.

The diagram below shows just how great the benefits of CRM can be to sales, and consequently for the business itself also. As can be seen, by using a CRM system it is possible to achieve 10% sales revenue growth per sales representative. This is achieved every year.

Figure: The Sales Benefits of CRM (Source: Success with CRM, 2013)



Additionally, other benefits of the CRM system are a five percent cut to the cost of the sales function. It is also thought that those businesses that use CRM systems benefit from a five percent increase in win rates for forecasted sales. Indeed, research shows that more deals are made that are larger, with lower costs when a CRM system is utilized. Gartner reports that 80 percent of the future revenue from a business should come from 20 percent of the company's existing customers. This indicates that getting sales using the system and keeping it up to date is important for business success in the longer term. Studies have found that sales people are happier using CRM because they benefit from the ability to use the information fed to them automatically from the marketing team. This means that sales teams cut back on the administrative tasks that they might have previously had to do, and instead get to spend their time selling.

> It is possible to achieve 10% sales revenue growth per sales representative…

All of these are great benefits and all achievable by organizations that implement CRM systems, but all are realized only if sales representatives are interacting effectively with the CRM system. This means that purchasing a system that sales teams want and that offers the functionality that they need. Below, some of the must have functions for CRM systems from the perspective of sales professionals are outlined.

Functionality that Sales People Want

Mobile CRM

Mobile CRM is perhaps the most sought after functionality that sales people seek from a CRM system. Mobile CRM, as the name suggests, allows companies to use mobile devices and applications such as cell phones or tablets to manage customer relationships. The use of Mobile CRM is growing extremely rapidly, and Gartner carried out research that showed that there will be more than 1,200 Mobile CRM apps in app stores by 2014. Additionally, it is expected that Mobile CRM will have grown by 500 percent compared with the figures that had been originally estimated for 2013.

Mobile CRM offers many advantages for sales representatives, with the main one being that sales people are able to access everything that they need while on the move. That means that it is possible to meet customer needs immediately, rather than waiting until the sales person gets back to the office. This has obvious advantages for the sales representative as it means that they are better equipped to make the sale in the moment while the conversation is happening with the customer, as they have all of the information needed at their finger tips to do so. This allows them to strike while the deal is hot. If the customer has time to think about it while the sales person goes back to the office to find the information that the customer needs, or to process the deal then they have more of a chance to come up with objections. The ability to sell on the spot is the main benefit of Mobile CRM. This is excellent for the sales person because it means that they are able to make more commissions. It is also good for the business as it is more profitable, so everyone benefits.

> Mobile CRM can increase sales person productivity by more than 14%…

Indeed, Mobile CRM is thought to have the capability to increase sales person productivity by in excess of 14 percent, according to Nucleus Research (2012). This is thought to be because it is possible to process orders more rapidly and solve problems faster. Of course, since sales people have access to their data in the field through the Mobile CRM, they are also more likely to be productive while traveling between potential sales leads, rather than wasting travel time as 'dead time'. This also contributes towards the productivity increases that are seen with Mobile CRM.

Built in Reporting

What sales people most want to do is get out there and sell. Spending time developing a complex weekly report, for a sales person, is time that they are not using as productively as they could be. With this in mind it makes sense that functionality that automates reporting in CRM systems is frequently requested by sales people. Rather than spending hours fiddling around getting a report both accurate in terms of the numbers, and formatted correctly in the way that their manager needs it, sales people can be out in the field getting on with what they do best – the selling. Most of the good CRM systems will include sales reports that can be easily generated by sales people with minimal fuss, and often at the press of a button.

In fact it is not just reporting that sales people appreciate in a CRM system. Any administrative activity that a CRM system can perform in a more automated manner for them will be valued by the sales team.

Lead Nurturing and Lead Scoring

Lead nurturing is a marketing automation function that sales people want in their CRM system because it allows relationships to be built with customers that are not quite ready to buy, but with a little more interaction could be. In 2013, Marketo reported that lead nurturing has the potential to "result in 50 percent more sales leads at 33 percent lower cost per lead". The lead nurturing process helps to shape customers so that they become ready for the sale. Consequently, when marketers use these types of tools, sales people have a better chance of being able to sell to potential customers. The lead nurturing process allows information to be fed to the sales team regarding the types of information that potential customers have accessed on the organization's website, for example, which leads to the chance for a sales person to have a more constructive discussion with a potential customer that is more likely to be based on their actual needs.

> Lead nurturing has the potential to result in 50% more sales leads at 33% lower costs per lead…

Lead scoring is particularly helpful for sales people too as it enables them to see which potential customers are more likely to end up in a sale. Lead scoring reviews the potential customer to understand their likely level of interest in making a purchase, allowing sales people to separate the potential customers from the students carrying out research projects or other non-customers that may be using the company's website or requesting information. This saves a lot of time for the sales team and provides a solid guideline as to where sales should invest most of their efforts, so is a much loved CRM function for sales people.

Automated Contact Creation

CRM systems and the apps that can be purchased to go with them are becoming smart. One of the ways that this is occurring is through the development of functionality that allows contact data to be easily uploaded into the system, with very little manual intervention. For example, functionality is available that allows CRM systems to be able to scan cards that sales people receive from potential customers. This can be achieved simply by taking a picture of the business card provided by the customer. It means that leads are captured quickly and easily and with little fuss. Provided that the scanning is carried out immediately, this also means that sales people have less chance of losing an important business card for a very strong lead. As any sales person will attest, this is very easily done, and can lead to the loss of business for an organization.

> Automated contact creation can capture contact details easily without fuss…

Simple Proposal Creation

Sales people frequently request functionality in CRM systems that allows them to produce sales proposals for customers simply and quickly, that are laid out in a style that is attractive to customers. This is usually dependent on the need to also have an easy to understand price list that the CRM system is able to draw from appropriately when the sales person requires it. Many organizations let their pricing systems become rather complex and unwieldy making it challenging for sales people to generate sales proposals rapidly, as they navigate the complex spreadsheets to find the information that they need to be able to produce a timely and effective sales proposal. CRM systems bring the ability to be able to speed up this process tremendously. It is possible with many CRM systems to be able to include push button proposal building for sales people. The system can be programmed to include templates that include the pertinent information at the touch of a button. Some variable items can be manipulated by sales people in the proposal if required. This functionality can become disliked by the sales team if it does not allow them to provide a personalized message to the customer within it, so considering this when selecting a CRM system with the sales people in mind is important. A template that is not tailored to any degree can be a turn off for a potential customer, so sales people do need to be able to edit some of the text. However, if most of the work can be done for them through the production of a basic template at the click of a button, then many sales people will be very satisfied with the time savings that are achieved.

> Functionality that reduces manual administrative work leaves more time to make sales…

Usability

While usability is not functionality per se, a system that is challenging to use for sales people will be the surest way to get the sales team to not use the system. Sales people like most people, appreciate systems that are easy to use and intuitive. No one wants to spend a lot of time trying to figure out how to carry out basic day to day activities, or to have to click many times or navigate simple fields just to carry out a simple task. Usability is fundamental in getting sales people to use the CRM system, and a system that is challenging will be avoided. This will lead to the organization not gaining the desired benefits or return on investment that was envisaged at the outset when the CRM system was purchased.

Here are some tips for getting usability right:

- **Key activities easily accessible** – the CRM system should present the information that the sales person needs to them when they login. They should not have to hunt around in menus for activities that they carry out frequently, such as uploading contacts.
- **Minimal clicks to carry out tasks** – the sales person should have to carry out as few clicks as possible to carry out the types of tasks that they have to perform all of the time.
- **Avoid page reloads** – where possible it is best if clicking avoids unnecessary page reloads that tend to slow up the system and make it less usable.
- **One page customer overviews** – allowing sales people to see all of the information about the customer that they might most often need at a glance on one page, avoiding them having to search for information will be appreciated by the sales team.
- **De-clutter the screen** – if there is information that sales people do not need which only clutters their screen try to remove it from their view. For example, sales people may not need to see functionality that is only required by marketing or customer services personnel. This can be removed from their view, to remove unnecessary clutter, simplifying the system for their use.

All of these steps will make the system much more usable for the sales team, meaning that they will be more likely to adopt the system and become more productive overall.

Consult the Sales Team

If organizations consider the functionality and usability aspects of CRM systems outlined in this report, this will help them to provide the sales team with a system that best meets their needs.

However, in addition to this, actually asking the sales people what they want can be hugely beneficial in delivering functionality that is useful for the sales team at your organization. Not all sales teams are identical, and what works for one sales team may not be appropriate for the situation faced by another sales team. Discussing the

CRM system needs of the sales people with them before purchasing a system is essential to making sure that their needs are met. Assumptions should not be made and rather, a discussion with a business requirements analyst that can understand the needs of the sales team and document them effectively is extremely useful in seeking a system that is most likely to be adopted by the team, so that return on investment can be fully achieved. Understanding the way that sales people work at your organization includes reviewing the processes followed by the team, to make sure that sales representatives will have precisely what they need. This requires looking at different areas such as how territories are assigned and how accounts are organized, as well as how the forecasting process is carried out, among others.

Asking the sales people what they want in terms of functionality and usability can aid uptake of the system. Considering that a large number of CRM system implementations fail because users do not adopt the system, this is particularly important. Getting the sales people involved in the process at the requirements building stage can increase their engagement in the project and this means that they will be more likely to use the system once it is implemented. If they are not consulted they will be more likely to reject the use of the system. Of course it also has the important benefit of making sure that no essential sales team requirements are overlooked in purchasing a new CRM system.

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