

# SalesProcess360

Helping Companies Get ROI from CRM

2017-18 Speaker Profile & Topics

## Book Brian Gardner for Your Next Event



### Contact Us:

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salesprocess360.com

salesprocess360.com

Brian has spoken for these organizations and more:



**“Brian’s material was so well received, he was invited back to address the specific sales and CRM needs at several of our EDGE member companies.”** - Pamela Schwaller, Economic Development through Growing Enterprises

**“You did an amazing job at the breakout sessions and the message was well-received by our members.”** - Jennifer Murphy, President, NetPlus Alliance

**“His material is timely and resonates with the audience of manufacturing and channel-partner industry executives.”** - Teresa Sebring, President, Measurement, Control & Automation Association

**Brian Gardner has spent more than 25 years in sales and sales management in industrial markets.** He founded SalesProcess360 to work with companies to improve sales processes and get the most from CRM. His book, *ROI from CRM: It’s About Sales Process, Not Just Technology*, was published by leading industry publication *Modern Distribution Management* and gets top reviews.



In the book, Brian taps his decades of industrial sales experience to provide simple yet effective strategies to get the most from customer relationship management. The book shows distributors, reps and manufacturers how to approach CRM as a system for leveraging knowledge throughout their businesses, and gain an edge with a revamped sales process.

Brian is available to present the following topics for your next sales meeting, association meeting, trade show, webinar and more. Each is available as a talk or workshop, can range from one to four hours, and can be customized to fit your audience’s needs. Brian’s goal is to present real-world ideas and exercises to help sales teams see the value of processes on the front end of the sales cycle.

“Thank you so much for your course this afternoon. This was truly amazing.”

- Chris Martin, GF, at the University of Innovative Distribution

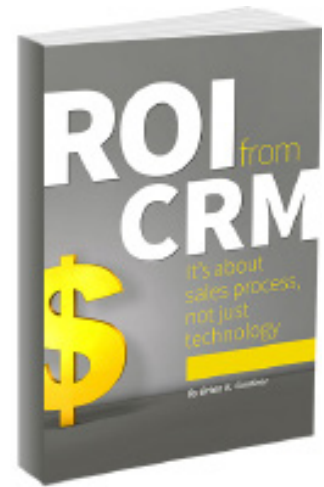
“Brian is a dynamic presenter who really knows what he is talking about.”

- Joe Incontri, Krohne Inc.

## THEME 1: ROI from CRM

Brian will challenge attendees to rethink CRM and get the ROI they expect. CRM goes beyond just outside and inside sales. The key is to leverage knowledge across the business, including sales, customer service, management and service. This presentation and the topics it covers can be adapted for a single webinar, live speaking session or for multiple sessions.

Based on his book, Brian will walk attendees through the SalesProcess360 CRM Audit, a simple process that includes his Sales Process Review, Sales Process Gap Analysis, the CRM Roadmap Matrix, the CRM Phased Roadmap and the CRM ROI Calculator. He will address why ROI from CRM is not an oxymoron, will define and provide examples of soft and hard ROI, and will break down the areas where you can measure true ROI from CRM. He can cover all or some of the below topics based on your audience's needs:



- **10 Reasons CRM Fails (And How You Can Succeed)**

Brian reviews the most common reasons industrial distributors and manufacturers may struggle to reap ROI from CRM with this easy-to-follow list based on his personal experiences and work with distributors, reps and manufacturers.

- **CRM is Not a Four-Letter Word**

CRM is not a four-letter word. It's a three-letter word. CRM stands for Customer Relationship Management. That does not sound too bad. Unfortunately, when you mention CRM, you typically get strange looks - like, don't ask me about this, or you brought up a subject that brings back painful memories. During this session, Brian will discuss the good, the bad and the ugly that he has seen over the past 25 years in the industrial market. After this session, if you haven't already implemented CRM, you will have a roadmap you can focus on to do so effectively. If you are already doing CRM, you will have areas to focus on that you can take back to your team and realign. This is a condensed version of the full ROI from CRM talk.

- **CRM: It's About Sales Process, Not Technology**

Imagine the sales process in the 360 degrees of a circle. The back end is the quote-to-order stage. The front end includes leads and opportunities, which are where you will find the highest ROI. Unfortunately, while critical, companies tend to dedicate fewer resources to the front end. Brian will talk about why a focus on process is the foundation for maximizing ROI from CRM.

- **Get Sales Cowboys On-Board and Drive Buy-In for Your CRM Initiative**

Even when companies have implemented powerful technology alongside strong sales processes, a lack of buy-in to CRM initiatives can stop a CRM project in its tracks. When decision-makers aren't on board, implementations and integrations are rocky. When sales managers don't buy in, they won't use CRM to set goals or priorities for sales reps. And if sales reps don't buy in, they'll still use outdated and error-prone tracking methods like spreadsheets, and they won't

"Brian's seminar was on-point and really made me think about ways in which we could grow our business going forward."

- Brad Rennick, Corporate VP,  
Wika Instruments

"Brian Gardner is a dynamic and engaging speaker. He is a proven and valuable resource to our membership. The audience always gives Brian high ratings and asks the planning committee to invite him for encore presentations."

- Teresa Sebring, Vice President,  
Measurement, Control & Automation Association

## Free Webinars: CRM Best Practice Roundtables

Brian Gardner hosts free quarterly sales and CRM roundtable sessions for associations and buying groups in the distribution and manufacturing space.

Here's how it works: Attendees submit questions in advance, and they discuss each topic as a group during the session. Brian pulls from 25 years' experience in sales management and CRM to throw in his two cents. He typically has a member of our marketing team attend and write up a highlights article for your association's newsletter or blog, extending the educational value of this service to your entire membership base. This service is of no cost to you.

Interested in talking more about this potential benefit for your members? Give us a call at 504-355-1150 or email [sales@salesprocess360.com](mailto:sales@salesprocess360.com)

leverage the system to improve customer service or sales effectiveness. This session will be filled with buy-in-boosting best practices that work for companies whether they are just getting started with a new CRM or trying to get more value out of a legacy system.

- **Beyond Outside Sales: How a Whole-Team Approach to Sales will Maximize Your ROI**

One of CRM's primary objectives should be to improve and automate the sales process with your team, not just outside salespeople. But many companies focus CRM primarily – if not solely – on the outside salesperson. Companies who do this are missing the boat and ultimately where the ROI is with CRM. Brian will discuss how to review your current sales process and identify gaps where improved processes and CRM can bring the ROI a company seeks. This session is focused on building a foundation for CRM success with a strong team-based approach to sales.

- **Goodbye Wish Lists: Building a Realistic Roadmap for Getting ROI out of CRM**

Brian will talk about why companies don't need to start with long specifications and wish lists when preparing to invest in CRM. Instead, he'll show how the simpler Sales Process Review and CRM Roadmap Matrix can help companies identify what to focus on first to chart a path for success.

- **Driving Accountability in Sales: Which Sales KPIs to Track and Why**

Brian will challenge attendees to think about KPIs on the front end of the sales process and walk them through a process to calculate what those KPIs should be, as well as how to manage them using CRM.

- **Why CRM is a Revenue Generator, Not a Cost**

Many industrial distributors, reps and manufacturers tend to view any kind of technology investment as a cost. Part of that stems from the need to budget the investment, which is typically done under the eye of the CFO. Brian will challenge companies to instead view technology investments as an opportunity to grow sales and profitability far beyond the initial expense.

“Brian exudes passion and enthusiasm for his material, keeps the students engaged, asks appropriate and penetrating questions, and just enough real business humor to keep everyone interested.”

– Bob Borsh, Industrial Distribution Program, Texas A&M University

## THEME 2: What is Your Competitive Edge? (It's Not What You Think It Is)

This high-energy topic will challenge and break you out of your comfort zone with industrial sales-focused discussions and exercises. Most companies' competitive edge is not what they think it is, and in most cases is actually the same as their competitors'. This presentation will center on competitive edge opportunities and processes that most companies are not focused on.

The sales-process topics that follow are set up as 30-60 minute individual talks or workshops allowing you to customize the areas that are of most interest to your group:

- **Focus on the 180: Front-End Sales Management for Growth**

This talk dives into the sales cycle and challenges you to ask yourself: Where is most of your energy spent? The front or the back end of the sales cycle? We break the front end into three areas and ask tough questions that will let you grade your company and take it back to your team. This session is typically a prerequisite for the other topics as it sets the stage and gets the attendees thinking and in the right frame of mind.

- **Size Matters: Why Managing Your Sales Pipeline Isn't Enough Today**

Most companies set sales goals each year. They typically break these goals down by customer, salesperson, territory and product. In this presentation, we'll define load input, and help you determine what your load goal needs to be for your sales team to reach its goals. It's a different way of thinking and one Brian finds most companies are not doing. You will leave this session with a roadmap to set load goals. Remember, setting sales goals is just the start.

Also covered in this presentation: Pipeline. While Pipeline is a component of Load Goals, it's critical to think of it separately. Most companies have some way of managing their pipelines, but in this session we will find out that managing the sales pipeline is not enough in today's competitive market.

- **Driving Accountability in Sales: Which Front-End KPIs to Track and Why**

Most companies have back-end focused KPIs, or Key Performance Indicators, but are not even thinking about or monitoring front-end KPIs. This session will challenge you to think about KPIs on the front end of the sales process and walk you through a process to calculate what those KPIs should be, as well as how to manage them. You will leave this session with a process to take back to your team to create the KPIs you can focus on to grow your business.

- **Yes, Profiling is OK: Identify and Grow with Target Accounts**

Many companies talk about target accounts but stop there. In this session, we will ask four simple questions that will help you profile your accounts to put them in the proper matrix to determine if they should be considered a target account. When this has been reviewed via a worksheet, we will talk about how to focus on these accounts and put in place systems to ensure your team is staying on track.

- **Break Through Siloes with Team Selling**

1+1 = 4. Team selling is the answer. Doesn't this sound good? These sessions will challenge you on the reality of your company taking a team approach to selling. What we typically find is that most companies think they are doing team selling, but in reality most



companies are siloed. We will illustrate how team selling goes beyond just outside and inside sales, and why that is so important. After this session, you'll be able to go back to your organization and put into place processes to truly start "team selling."

- **Business Intelligence: How to Leverage Market Demand, CRM & ERP for Growth**

This session will examine how leveraging data across a company's systems can give industrial organizations a competitive edge and roadmap for their sales teams on where to spend their time.

Contact SalesProcess360 today to book Brian Gardner for your next sales meeting, convention, webinar or other event:

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We're happy to customize any of these topics to fit your needs!



SalesProcess360 is made up of industrial sales specialists with real-world experience and passion to help you put in place winning processes on the front end of the sales cycle.

## About Brian Gardner

The founder of SalesProcess360, Brian Gardner, has spent more than 25 years in sales and sales management in the industrial market. He served as sales manager for a major regional rep/distribution company for 15 years before he founded Selltis, LLC, the only industrial-focused sales team CRM solution with roots deeply embedded in sales process improvement. Having guided Selltis to success, he has taken his passion for process improvement to the speaking and coaching world as the founder and lead evangelist at SalesProcess360. He is the author of *ROI from CRM: It's About Sales Process, Not Just Technology*. He is also a Subject Matter Expert at Texas A&M University.



Brian was a faculty member at the 2016 University of Innovative Distribution in Indianapolis. He is also on the speaking circuit for many process control and industrial associations. He has conducted seminars on the topic of sales and sales management at Texas A&M (Industrial Distribution Department), Louisiana State University, Case Western Reserve University, Sales Management Association, MCAA (Measurement and Control), CPCA (Canadian Process Control), NetPlus Alliance, NAHAD (Hose and Accessories) and ISA (Instrumentation and Process Control), along with being a presenter at annual sales meetings for various companies.

He has worked with many manufacturer and distribution companies to put in place systems to improve their sales process management on the front end of the sales cycle. Brian earned his BS in Industrial Technology from Louisiana State University. Brian is a devoted family man. He lives in the New Orleans area with his wife and 3 children.

## About SalesProcess360

At SalesProcess360 our ability to help you grow your business is all about focus and processes. It doesn't have to be complicated. Focusing on effective yet simple processes to manage the "blocking and tackling" of selling will put you ahead of your competition. Our passion is to help you get there.

Services include:

- Consulting and Coaching
- CRM Utilization
- Industrial Sales Management Peer Groups
- Sales Process Review and Mapping
- Speaking and Seminars

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