SalesProcess360
*Helping Companies Get ROI from CRM*

# 5 Ways to Supercharge Your Sales Process in 2017

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504-355-1150

sales@
salesprocess360.com

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When it comes to making the most of your sales resources in 2017, it's all about fine-tuning your sales process. Doing so can help you ensure that customer service is as seamless as possible, and it can enable sales reps to focus their efforts in the right places. With the right processes and culture in place, your sales team will become a well-oiled selling machine.

Consider every stage of your sales effort. On the front end of the sales process, for example, your sales reps could be wasting their time on opportunities that are unlikely to convert if your company doesn't qualify leads before handing them over to sales. And on the back end, some opportunities may be slipping through the cracks if you don't have a process to follow up on quotes.

Process gaps like these can occur whether your company uses a tracking tool like Excel or the latest and greatest customer relationship management (CRM) software platform. It's true that the right platform can help you develop, refine, connect and automate processes in powerful ways. But the processes themselves are where the magic happens.

Maximize the impact of your sales team in 2017 with these seven tips that will supercharge your sales process.

## 1. Focus on the front end.

Many companies focus their sales efforts at the quote stage, but an effective sales process starts at the lead and opportunity stages, before a quote is even sent. Opportunities in particular are where sales are truly won, because at this stage, your sales rep is in control and well-positioned to shape the direction and scope of the customer's project.

If you wait to engage until a quote has already been requested, much of the customer's decision-making has already been made, leaving the customer in control.

Do you have processes guiding lead generation, qualification and follow-up? Do you have clear standards that define an opportunity, and does your team have access to (and actually use) a system where opportunities can be managed and tracked? Do a high percentage of your leads convert to actionable opportunities? How would you rate your follow-up?

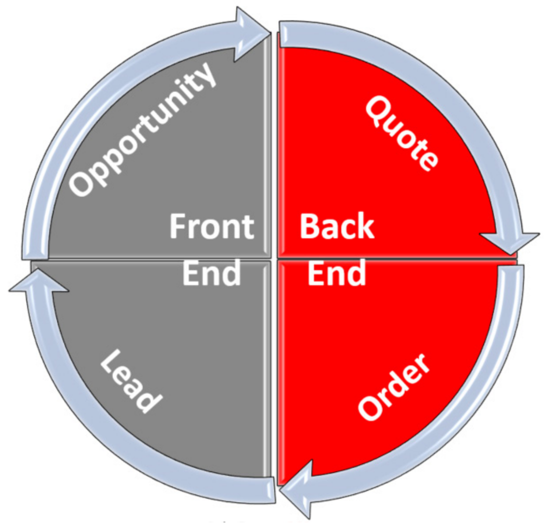
Take time to honestly answer these questions, then ask yourself:

On a scale of 1 to 5, 5 being excellent and 1 being poor, how would you rate your company's engagement with customers at this stage? If you've ranked your company

Rather than looking backward, this process shifts your focus to the front end and becomes your leading indicator for sales.

as a 2 or 3 in this early stage, you're missing out on the time where your customers are most impressionable and your sales team has the greatest amount of control.

The good news is that you're not alone; most distribution companies can only grade themselves as high as a 2 or 3 at the lead and opportunity stages. This means that if you increase your focus on the front end of the sales process, you will gain an advantage against your competition.




The point is not to ignore the back end of the process, but to put equal emphasis on processes, procedures and visibility at all stages of the sales cycle.

## 2. Identify and track actionable metrics.

An effective sales process includes the generation and utilization of metrics that help you gauge progress you're making toward your sales goals and adjust your sales strategies accordingly. Most companies already track a variety of metrics, but these metrics are usually generated on the back-end, including monthly bookings, inventory turns and invoicing. Sales goals themselves are usually backward-looking, as well, based on historical performance.

While there's nothing wrong with basing future sales goals on past performance, monitoring backward-looking metrics isn't a good way to project future performance. The pipeline metric many companies focus on (which measures the accumulation of open quotes) can get you part-way, but it can't give you month-to-month insights or look far into the future.

To more closely track your progress toward your sales goals, use the formula below:

**Sales Goal = Base Business + (New Load Input x Hit Rate)**

Load input is a new way of thinking about and running your business. It's about understanding what you need to reach your sales goals in the form of qualified leads and opportunities, or your load input. The key to the formula above is determining the new load input requirement to meet your sales goal.

When you trend your load input goal vs. the number of new opportunities on a monthly basis in a CRM or other system, you will know whether you are heading in the right direction. Rather than looking backward, this approach shifts your focus to the front end and becomes your leading indicator for sales.

This also allows you to spot problems and make adjustments earlier in the sales process, getting you on the right path to reach your goals.

## 3. Automate.

An effective CRM system automates and supports effective sales processes.

Take quote follow-up, for example. Many company leaders say their sales teams are bad at quote follow-up because it's a lower priority for their reps than their other day-to-day tasks.

Automation is an ideal solution. Use your company's CRM or email system to automatically send a follow-up email to customers a set amount of time after receiving a quote. Even if only a few quotes convert, it will be well worth the time it will take to set this up.

Don't recreate the wheel every week, month or quarter. Automate those spreadsheets and use real-time information to proactively run your business.

Consider automating not only quote follow-up, but also customer-requested report generation, management-requested activity reports and other time-sucking elements of your sales process. Don't recreate the wheel every week, month or quarter. An effective CRM will automate those spreadsheets and, even better, result in real-time information you can use to run your business proactively. Give reps more time for tasks that add value, including proactive sales opportunity management.

## 4. Embrace team-based selling.

Leverage the collective knowledge of your company. Information sharing results in a seamless experience for customers and gives your sales reps an edge.

| | |
|---|---|
| Inside Sales | Outside Sales |
| Product Specialist | Outside Sales/Inside |
| Marketing | Outside Sales/Inside |
| Accounting | Outside Sales/Inside |

*An inclusive CRM system can bridge islands of data in your company.*

Despite the potential benefits, many companies don't take full advantage of technology that allows them to share information between departments, branches and individual reps. But implementing a CRM system that bridges these islands of data will allow your sales reps to leverage information from inside sales, customer service and your service team to better serve customers and offer solutions that are likely to resonate with each customer segment's unique needs. It will also accelerate the on-boarding process for new reps.

But technology alone won't ensure that your workforce will share and use information from other departments; a team-oriented culture is required. Invite members of other departments to your sales meetings, train your sales teams on the benefits of team selling and consider restructuring compensation plans to encourage a team-selling culture.

## 5. Gather and act on feedback from customers.

An effective sales process is a feedback loop. It encourages the regular recording and analysis of information to lend insight into how you can improve your sales process.

Incorporating probing questions into your sales process is one way you can create a feedback loop. At the quote stage, for example, have reps routinely ask customers what will be the next stage in the process (and then remain silent); the answer can tell you whether your customer is seriously evaluating you, or whether you're just serving as a third quote. If the quote is lost, have reps ask why, a valuable question. Document the answer in the CRM. The resulting data can then be analyzed as a whole and for each of your customer segments, uncovering customer buying behavior and trends that can inform your future strategy.

Keep your sales reps accountable for asking the questions you've put in place. Have sales managers frequently ask your salespeople for the answers to these questions during casual conversations or more formally in meetings and performance reviews. Some CRM systems will even allow you to make these questions required fields.

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When you have a good set of data, analyze it with the help of spreadsheets or reports automated by your CRM. Over time, refine your questions and use the insights to continually refine your process and selling strategy.

## How We Can Help

SalesProcess360 helps industrial sales companies (reps/distributors/manufacturers) put in place sales processes that give companies a competitive edge in today's market. Our proven process has helped many companies best leverage their current systems or select and implement a new one. Learn more about SalesProcess360 at salesprocess360.com.

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

## About Founder 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*.

Brian is a Subject Matter Expert in CRM at Texas A&M University. He 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), Case Western Reserve University, Sales Management Association, MCAA (Measurement and Control), CPCA (Canadian Process Control), ISA (Industrial Supply Association), 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, as well as working in Switzerland during college in manufacturing and marketing for a pressure and temperature technology company. Brian is a devoted family man. He lives in the New Orleans area with his wife and 3 children.

## About SalesProcess360

SalesProcess360 helps industrial sales organizations get ROI from CRM. We believe it's about process, not just technology. We work with companies at all stages of CRM, from CRM selection to ongoing training long after implementation. We offer CRM audits, evaluations, implementation coaching and management training. We also offer coaching on sales process and speaking services for associations, manufacturers, distributors and more.

**Learn about SalesProcess360 at salesprocess360.com.**