

Get ROI from CRM:

SalesProcess360 CRM Audit

Learn More:

504-957-8499

sales@
salesprocess360.com

salesprocess360.com

Are your processes driving how you use CRM? The SalesProcess360 CRM Audit is a systematic approach that will help you get ROI from CRM.

The SalesProcess360 CRM Audit was developed out of a need we found while working with clients early in their CRM evaluations. They'd provide their specification lists, which were typically just a long list of features. The list would never include processes they wanted to improve using CRM.



The SalesProcess360 CRM Audit will help you identify gaps in your sales processes and what it will take to fill those gaps. The result: a clearly defined plan for ROI from CRM based on your company's true needs.

Whether you are just getting started on CRM or already have CRM and want to get ROI, we can help. Invite SalesProcess360 to start the process off right with a CRM Audit.

How it works:

Imagine a funnel. The results of the first step of the SalesProcess360 CRM Audit are at the top of the funnel and feed into the second, and so on, until you have a plan based on your company's true needs, which emerge at the bottom of the funnel. This ensures you are tackling the critical areas of your business that will provide the greatest ROI in both the short- and long-term. We'll wrap up the process with an analysis that will provide you with real data you can present to justify your investment in CRM.

The CRM Audit is simple but powerful.

Identify inefficiencies in your sales process.

Getting ROI from CRM is about process, not just technology. We'll start by taking a close look at how your team works together to execute your sales process. To do this, we'll use two SalesProcess360 Tools:

Sales Process Review Questionnaire

One of CRM's primary objectives should be to improve and automate the sales process with your entire team, not just outside salespeople. Companies that only focus on their outside sales teams are missing where the ultimate ROI with CRM lies. We'll involve your entire team and use the Sales Process Review Questionnaire to review your current processes in detail to look for the pain by going through each part of your

“(SalesProcess360 founder) Brian Gardner understands the challenges of industrial sales because of his extensive management experience in the field. This gives him a unique ability to explore and analyze problems and suggest solutions.”

- Doug Baker, Teledyne

company, similar to a doctor's visit.

Sales Process Gap Analysis

Based on your answers in the Sales Process Review Questionnaire, we'll identify gaps in your sales process. These gaps are where focus with improved processes and CRM can bring ROI to CRM.

>> Your Takeaways:

Sales Process Gap Analysis by department, prioritized

Identify your priorities and next steps with CRM.

A phased approach to implementing CRM, with an eye on key pain points identified in your Sales Process Gap Analysis, can ease implementation and adoption. This will help you whether you already have CRM or are just getting started. We'll take what we learned in Step 1 and map out your next steps using two SalesProcess360 Tools:

CRM Roadmap Matrix

We'll plot the gaps we identified in Step 1 in a customized CRM Roadmap Matrix. In the Roadmap Matrix, we'll prioritize each based on the difficulty level and the impact it would have on the business. We'll also include:

- The value proposition of filling each gap
- Obstacles you'll face
- Departments most affected
- Internal champions for each effort
- Major action items
- Functionality you'd need in a CRM system to accomplish the goal

CRM Phased Roadmap

Survey after survey has shown industrial sales organizations are often overwhelmed by the idea of implementing CRM either because of past failures or because they anticipate resistance from their teams. For those that do jump in, many move far too quickly, trying to do too much, too soon. Based on your answers in the CRM Roadmap Matrix, we'll build a CRM Phased Roadmap to give you a clear path to getting ROI from CRM.

Your customized Phased Roadmap includes up to four phases, including implementation. Our philosophy is to start slow and grow. And that means succeeding at Phase 1



"If you are a distributor, representative or manufacturer in the industrial equipment sector, you will benefit greatly from (SalesProcess360's) insights on sales management and customer information systems optimization."

– Joe Incontri, Krohne Inc.

before moving to Phase 2, and so on. Each phase may range from 30 days to 90 days, or more, depending on your needs. Start small and build on your successes. This is the key to ROI.

>> Your Takeaways:

Customized CRM Action Plan, including your CRM Roadmap Matrix and an implementation roadmap

Justify your investment with the ROI Calculator.

When you've completed the primary steps of the SalesProcess360 CRM Audit, we'll calculate the potential return you could get from CRM based on the data we uncover. With the results from the CRM ROI Calculator, you will be able to justify your investment to either yourself or your managers.

>> Your Takeaways:

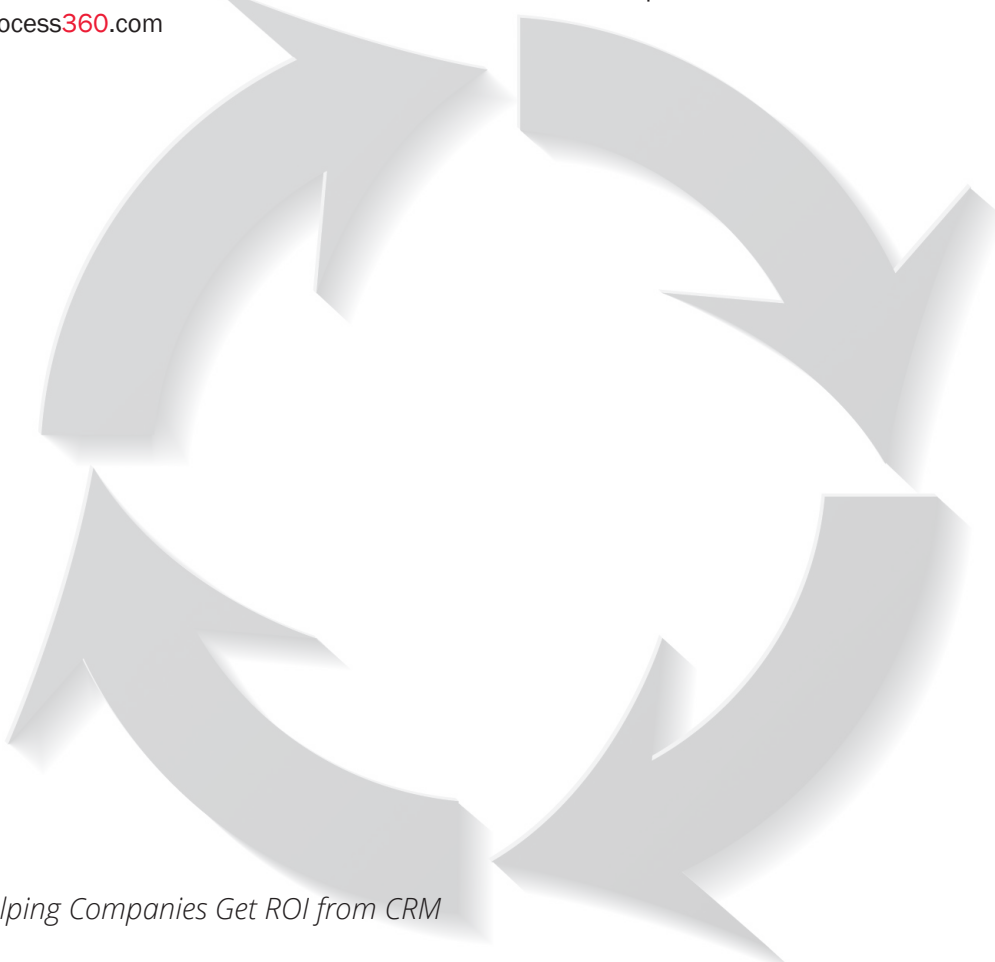
Numbers to justify your investment in CRM

Get Started Today.

Contact us today to discuss how you could benefit from a SalesProcess360 CRM Audit:

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Visit our website to learn more or access additional resources on sales process and CRM: salesprocess360.com



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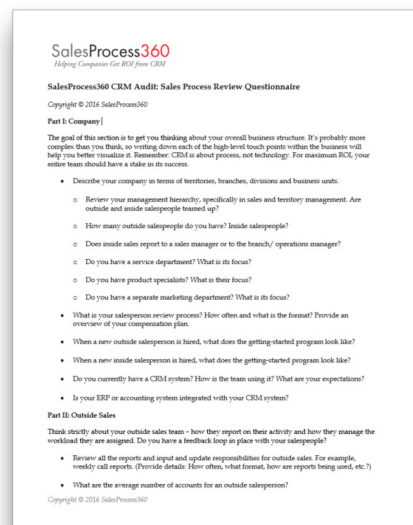
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1

Sales Process Review

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.

Step 1 of the SalesProcess360 CRM Audit is the sales process review, which analyzes your current processes and identifies gaps across your company. These gaps are where focus with improved processes and CRM can bring the ROI you seek. The Sales Process Review Questionnaire looks for the pain by going through each part of your company, similar to a doctor visit. After all, if the doctor doesn't know where the pain is, he can't treat it.



And if you don't know where gaps exist in your sales process, you can't fill them. Next, using the data collected in Step 1, we'll conduct a Sales Process Gap Analysis.

2

Sales Process Gap Analysis

We'll take each of the sections in the Sales Process Review and write down two to three areas of improvement – or gaps – where you feel you could add focus with improved processes, a starting point for getting the most out of CRM.

- Overall Company
- Outside Sales
- Inside Sales
- Service
- Marketing
- Lead Management
- Opportunity Management
- Quote Management
- Reporting
- Other Areas

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CRM Roadmap Matrix

After you have listed all the gaps or areas of improvement in each of the categories in the Sales Process Gap Analysis, we'll fill out the CRM Roadmap Matrix.

CRM ROI Roadmap Matrix									
Key Areas									
Focus	Departments Needed	Value Proposition	Obstacles	Difficulty (fill in)	Impact (fill in)	Matrix (calculated)	Start with		
1 Opportunity Management	Outside Sales	Better managing the front end of the sales cycle	Culture change with outside sales	M	H	MH	LH	MH	↓
2 Automating call reports	Outside Sales	Documenting where and who we are seeing	Getting outside sales to do this/see the value	L	H	LH	LH	MM	
3 Profiling and managing target accounts	Outside Sales	Make sure we are spending time in the right areas	Time to get accurate data	M	H	MH	MH	MM	
4 Documenting communication and touch poin	Inside Sales	Increased sales	System and commitment to do it	L	H	LH	LH	HH	
5									
6									
7									
8									
9									
10									
ACTIONS									
Focus	Internal Champion	Major Action Item	Changes in CRM system	By Date					
1 Opportunity Management	Sales manager	Develop criteria for opportunity							
2 Automating call reports	Sales manager	Determine key information to track							
3 Profiling and managing target accounts	Sales manager	Determine key information to get and track							
4 Documenting communication and touch poin	Inside sales or customer service manager	System to document all communication							
5									
6									
7									
8									
9									
10									
Focus	Additional Major Action Items	Additional Major Action Items	Additional Major Action Items	By Date					
1 Opportunity Management									
2 Automating call reports									
3 Profiling and managing target accounts									
4 Documenting communication and touch points									
5									
6									
7									
8									
9									
10									

As part of Step 3, we'll then document the following for each of the gaps:

- **Focus:** The gap (area of improvement/focus)
- **Departments needed:** Which departments will be needed for this?
- **Value proposition:** What is the value proposition for focusing on this gap?
- **Obstacles:** What are the hurdles to improving your process in this area?
- **Difficulty:** How difficult will improving this be?
- **Impact:** What is the overall impact of improving this area of your business?
- **Internal champion:** Who will be the internal champion for this improvement?
- **Major action items:** What are the major actions that will need to occur to move forward on this initiative? List in order of what needs to happen first, second and so on. List up to three major action items just to get started.
- **Changes in CRM system:** This can apply whether you have a CRM now or not.

After documenting the gaps, we will help you sort them by difficulty and impact to identify low-hanging fruit for quick wins, as well as long-term projects. This data will now feed into your CRM Phased Roadmap.

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4 CRM Phased Roadmap

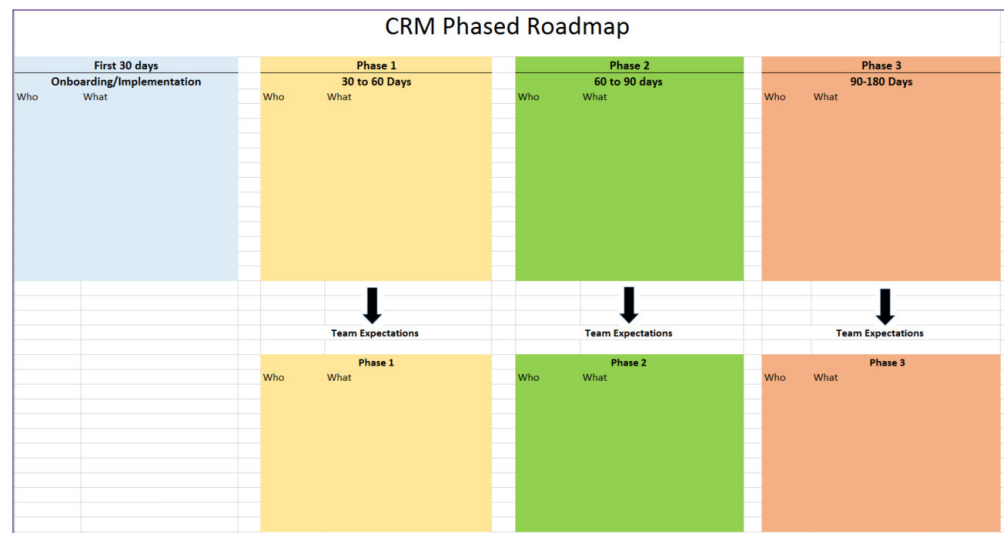
Industrial sales organizations are often overwhelmed by the idea of implementing CRM either because of past failures or because they anticipate resistance from their teams. For those companies that do jump in, some move too quickly, trying to do too much, too soon. Step 4 of the SalesProcess360 CRM Audit, the CRM Phased Roadmap, will help you to start slow and grow.

The CRM Roadmap Matrix identified and prioritized pain points in your company. Next we take those priorities and map them in a customized Phased Roadmap to ease implementation and adoption. There's no need to do everything at once; you'll go over-budget, and your team will be overwhelmed. And there's a good chance that the change you seek in your sales organization won't come to pass.

We'll break onboarding into three phases after the initial implementation:

- Implementation: First 30 Days
- Phase 1: 30-60 Days
- Phase 2: 60-90 Days
- Phase 3: 90-180 Days

The first 30-90 days in particular are critical to CRM's eventual success.



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5 CRM ROI Calculator

The final step in the SalesProcess360 CRM Audit is to calculate the potential return you may get from CRM based on the data you've uncovered thus far. With the results from the CRM ROI Calculator, SalesProcess360 will help you justify your investment.

Unfortunately, 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. But in our experience, it takes an increase of less than 1 percent in annual sales to offset initial investments in CRM technology.

CRM is a revenue generator if you prioritize better processes and procedures that allow you to share and leverage knowledge across all the touch points in your organization. The CRM ROI Calculator will show you that ROI from CRM is not an oxymoron.

CRM ROI Calculator			
Annual Sales	\$135,000,000	Update yellow fields with your company's numbers	
Avg. GP Margin	22%	Green cells are automatically calculated	
Calculated Annual GP	\$29,700,000		
Number of CRM users	50		
Monthly fee per user	65		
Calculated Annual Cost	\$39,000		
Start-Up Cost	\$30,000 (project mgmt, initial modifications, training)		
Additional First-Year Cost	\$3,000 (Additional modifications and training)		
Total First-Year Cost	\$72,000		
Based on	22% Avg GP % we will need to bring in	\$327,273	in additional Sales to pay for the CRM investment the first year.
	This is	0.24%	of current sales.
Areas we can put some numbers to:			
1 Increase in Sales due to focus and better management of the "Front End" of the sales cycle (Stage 1)	1.0%	(Increase in % of sales)	
2 Increase in HIT RATE % on quotes generated?	0.5%	Annual \$ quoted per year?	\$30,000,000
3 Increase in Sales due to better/documented communication between Inside Sales and Outside Sales	1.0%	(Increase in % of sales)	
4 Time spent by everyone doing reporting and data crunching per week	4 (# of hrs.)	cost per hour	100
5 Cost of losing a sales rep per year based on the following:			
\$ of lost revenue due to no documented activity to follow-up on (Annual)	\$20,000.00	(\$/yr)	
Management's time spent with new salesperson trying to get them up to speed on territory due to no road map (Annual)	\$10,000.00	(\$/yr)	
Lost production time of new salesperson during non-supervised time due to no road map (Annual)	\$10,000.00	(\$/yr)	
	Total	\$40,000	
	Average number of salespeople lost per year	1	

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 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 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

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

Learn about SalesProcess360 at salesprocess360.com.