

# CRM *at the Speed of Light*

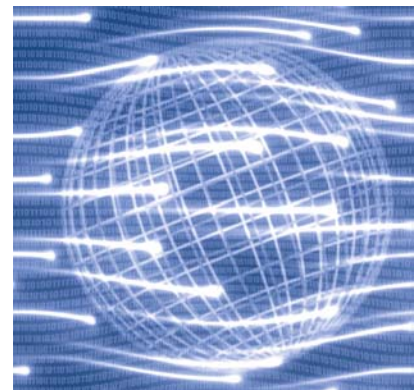
Essential Customer Strategies for the 21st Century

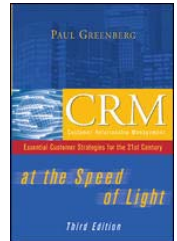
## *Exclusive Book Excerpt*

### About the author:

#### PAUL GREENBERG

Paul Greenberg is the President of the 56 Group, LLC, and author of the previous two best-selling editions of *CRM at the Speed of Light*, which have been translated into eight languages. The book has been named the number one CRM book by SearchCRM and has been called on of “*The 12 Most Important Books an Asian CEO Will Ever Read*” by the Asian-Pacific edition of CIO Magazine. Paul has extensive experience in the creation of ERP and CRM business units/practices. He writes a number of national columns including his “Straight Talk on Siebel” column for SearchCRM. Paul speaks and writes on CRM around the world and has made multiple appearances on television and radio. Paul was recently named co-chairman of the Rutgers University CRM Research Center and is a member of the Board of Advisors for Baylor University’s MBA CRM specialty program. He lives in Manassas, Virginia, with his wife and two cats.



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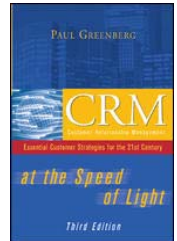
## **STEPPIN' OUT: Salesnet—Bang for the Practical Buck**

I like these folks. While you'll read more of them in Chapter 25, I want to emphasize that we have an ASP (see Chapter 16) that understands the value of business process and the value of the salesperson. Two of the hottest 2004 CRM values.

What makes this precious, especially to Steppin' Out, is that they are not only there to provide the processes that salespeople need, but they are building what they call “intelligent automation” into their solution. While there is something debatable about what seems to be an oxymoron (“intelligent automation”) and, while I'd love to get into the weightier questions of real intelligence vs. artificial intelligence, suffice it to say that what Salesnet is doing is actually really good.

Before we go on to look at this exceptional company's sales solutions, keep in mind that about two years ago, the ASP market did not really seem all that viable. But under the able leadership of Mike Doyle, one of the nicest and most competent CEOs in the CRM world, and an infusion of funding from trusted sources, plus a few key larger seat deals—600 seats and up—Salesnet not only kept plugging away, but began to grow. As the ASP market became increasingly interesting to a very price- and overhead-conscious, economically shaken business world, Salesnet simply started to do better and better. Now Salesnet can boast of very large scale deployments, most with two to five year contracts. Their customers are Staples, Sovereign Bank, and Software AG, among others. That is amazing for a company that isn't supposed to be appealing to the larger enterprises. They are bringing into question my continued assertion that the ASP market can't handle the largest enterprises. Salesnet is quietly disproving me. More on all this in Chapter 25, but for now I'll say three things about their sales offerings:

- ▶ They have successfully aimed at both the upper and lower ends of the small and medium business market and spilled into the larger enterprises. Their lower end product is called Salesnet Express.
  
- ▶ They have the deepest sales process conception and functionality of any of the ASPs, and they understand and execute on sales process better than many of the standalone CRM vendors.



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- ▶ They are one of the three vendors (with Oracle and SalesLogix) that “get it” when it comes to the next generation of working stiff sales force automation, and that is worth some congratulations.

### *The Features: The Future*

Salesnet provides three versions of its product, each increasingly rich. Salesnet Express is aimed at the small business with up to ten users. It provides the basic functionality with some reports, e-mail management, and account and opportunity management. It also helps the novice small company build their sales process.

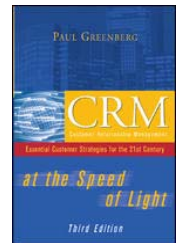
Salesnet Standard is all of that in a more substantial package that also includes embedded sales processes such as Targeted Account Selling and the fully customizable Process Builder. Outlook integration, sending and tracking outbound e-mail, centralized customer data, and a myriad of other features are part of this hosted solution for a larger company.

Finally they have Salesnet Extended, which takes all of the above and adds wireless and remote management and use and the secure offline edition. This is aimed at the Staples or Sovereign Banks of the world.

### *A Touch of Class Distinction*

Salesnet is distinguished from its fellow ASPs and several standalone vendors by a clear-cut commitment to the everyday sales team and the sales process simultaneously. To translate this commitment into practice, they provide a technology called Process Builder (see Figure 4-3) that uses an authoring tool to graphically represent and embed into your workflow any sales methodology you want it to. It could insert the famous highly structured Miller Heiman sales approach or one of your own creation. I think that the Miller Heiman approach is when you get behind a client and squeeze his sternum to pop out the lite beer can they are choking on. They are then so grateful you win the deal. Or is that the Miller Heimlich approach? I can't remember.

However, what I can remember is that Process Builder is a masterful process/workflow design tool that allows you to customize the Salesnet applications to the best practices that govern your sales process. That is the way that SFA is supposed to be done.



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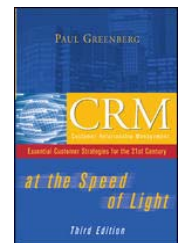
The screenshot shows the Salesnet Process Builder interface. The browser window title is "Welcome to Salesnet - Microsoft Internet Explorer". The address bar shows "https://www.salesnet.com/welcome.asp?href=true&mode=0". The Salesnet logo is visible in the top left. The main content area displays a sales process with the following steps:

Step	Step Type	Step Purpose
Step 3: G - Goal Shared ( 10% - 10% )	Step Type:	Step Purpose:
Results	Goto	Next Step Due
1 - Goal(s) Shared With Seller	[Immed., Adj]	[User Delegated]
2 - SOLUTION(s) In Process	[1 day, Adj]	[User Delegated]
3 - Initial Sell Cycle Control Letter Completed	[4]	[Immed., Adj] [User Delegated]
Step 4: G - Manager Review ( 10% - 10% )	Step Type:	Step Purpose:
Results	Goto	Next Step Due
Deliverables Complete	[5]	[Immed., Adj] [User Delegated]
Deliverables Incomplete	[3]	[Immed., Adj] [User Delegated]
Step 5: C - Champion ( 20% - 20% )	Step Type:	Step Purpose:
Results	Goto	Next Step Due
1 - SOLUTION Developed for Champion	[1 day]	[User Delegated]
2 - Sell Cycle Control Letter Reviewed With Champ	[Immed., Adj]	[User Delegated]
3 - Access To Key Players	[6]	[Immed., Adj] [User Delegated]
Step 6: C - Access To Key Players ( 20% - 20% )	Step Type:	Step Purpose:

Figure 4-3: Salesnet's Process Builder is a beautiful tool.

Other features that make Salesnet a standout for the working sales guy:

- ▶ **Virtual Coach** Salesnet uses a wizard to guide sales reps through the sales process, embedded through Process Builder. This can give predefined results and outcomes to select at every milestone, but only after the previous milestone is reached. This system of process-driven constraints is superb for newbie sales rep training and for making sure that what we'll call "lesser performers" aren't at the lower level because of failure to understand how to sell. Virtual Coach also provides the consistency of methodology that many companies like to have.
- ▶ **Automatic lead qualification** This is a great feature for a salesperson. Once you've established the business rules that govern lead qualification, Salesnet can score those leads upfront—taking into account those criteria and the business history that is appropriate to the lead. Once that is done, specific business steps can be triggered at different stages of the lead process—for example, when it automatically kicks over into a viable opportunity or when it calls for generation of a proposal. The salesperson kicks back and says here, "Life is good."



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- ▶ **Workflow tools** This is the heart of the Salesnet focus on the salespeople. It provides almost automatic results without bogging down reps with extraneous functionality. It can attach the steps in the sales processes that you've decided on to the actual responsibilities and roles of the sales (or other) personnel. So for example, a constraint can be created that states that any deal that is under 20 percent gross margin must be routed to the appropriate sales managers for approval. Then it goes ahead and does it. If that's what you want to do. The workflow tools allow for this granular customization. And sales managers like it because they can keep their fingers on the pulse of sales activities through fully customizable reports, dashboards, and charts. Salesnet offers add-on functionality for mobility, integration, advanced reporting, and enhanced process management.
- ▶ **Report Snapshot and Comparison engine** This allows you to compare any historic moment in sales with real-time data. No more guessing how current sales stand up to sales 60 days ago.
- ▶ **Microsoft Outlook Integration** I think I've said enough about this elsewhere. It is necessary. Salesnet has it. So do most of the competition. Salesnet does it very, very well and that merits notice. Their inclusion of it was driven by the need to eliminate copying and pasting of e-mail content by the sales rep into Salesnet's database.
- ▶ **Instant Messaging (IM)** No longer just the tool for your teenage daughter to blab with her friends online. It is now a serious communications tool for the enterprise—for salespeople to blab with their colleagues online. Actually, the ability to instantly communicate with your colleagues and even some of your clients via your desktop, notebook, PDA, or cellphone is priceless. Especially during football season.

The up tick in the number of sales reps using wireless technologies, like cellphones, wirelessly enabled laptops, and personal digital assistants, meant that Salesnet had to expand into the offline arena. Using the SQL Server and .NET framework, Salesnet's secure offline solution is a bit more robust than most of the offline solutions offered. Salesnet offline users can actually run reports and analytics offline, which distinguishes them from their competition. All in all, Salesnet is a distinguished company with a great set of solutions and a firm grasp on what's needed for this generation of salespeople: Gen S.



To learn more about how Salesnet can help your company elevate its sales, contact us today in the US at 1-877-350-0160. You may also visit [www.salesnet.com](http://www.salesnet.com) to test drive our award-winning CRM application, take a free interactive sales benchmark, or visit our sales knowledge and research center.