



Make CRM Work the Way Salespeople Do

LEVERAGE TODAY'S TECHNOLOGIES TO MAXIMIZE USER ADOPTION

To sales professionals, time has never been more precious.

The challenging economy is forcing salespeople to do more—to spend more time on the road, uncover more opportunities, and follow up on more prospects. Many of them are working in departments that have been cut back; their reward for having survived may include expanded territories, more accounts, and higher quotas.

This is forcing salespeople to be more resourceful and creative in how they generate leads, pique the interest of prospects, and close deals. Yet most research suggests that salespeople, on

average, spend less than 25 percent of their time on direct selling activities and only about 3 percent of their time selling their companies' newest products. The rest of their day is spent on administrative duties such as staff meetings, and on enabling activities such as travel and training.

Technology, for all its promise, has not been much help. To be sure, you'd be hard-pressed to find a salesperson who didn't have a BlackBerry or iPhone, didn't use email, and didn't turn to the Web to find information about prospects. But none of these technologies was built explicitly to help salespeople; the world's top rainmakers work their magic pretty

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much on their own, using their own improvised approaches—a combination of instincts, information, persuasiveness, and passion to get them in the door and win the coveted contract.

Which brings us to our subject—CRM systems. Let's start by acknowledging the contribution CRM has made to the broader sales function. The heavy lifting that CRM systems do with the transactional side of selling has made them an indispensable management tool in many organizations. CRM systems can be great at managing the lead-qualification process, generating efficient quotes, capturing orders and helping sales managers roll up results for individual territories, products, or salespeople.

But, says Mark Woollen, vice president of social CRM products at Oracle, when you ask salespeople what they get out of their corporations' CRM systems, "what they will tell you, if they're being charitable, is that the main benefit is providing transparency into their pipelines" and thus reducing the number of management inquiries they must respond to.

The problem, as any CRM specialist knows, is that traditional CRM systems aren't really designed to reinforce the most-critical selling functions. To start with, most CRM systems are built to be accessed from a laptop or desktop computer, and very few salespeople are sitting in front of one when they close an important deal. (More often, they're with a customer or prospect.)

Furthermore, because of the central role that CRM systems play in helping

organizations manage customer relationships and associated revenues, they tend to contain a lot of information within the application and also "present" data that is integrated from other enterprise applications. This means information important to salespeople is often buried many levels down, and therefore the salespeople may not even know it's there. Moreover, their companies probably wouldn't be happy if they spent too much time looking for it—a salesperson who would rather be futzing with a computer program than calling on prospects probably isn't much of a salesperson to begin with.

"If you look at CRM traditionally—and the systems that have reflected CRM as a business practice—you could confidently argue that they solved one part of the CRM challenge, but not the other part," Woollen says. Traditional CRM, he adds, is "very much focused on the automation of the tasks around managing your revenue stream," not on the meetings, exchanges of information, and snap judgments that often determine whether the business gets won.

"Salespeople spend their days in conversations with other people—with their Operations departments, with Legal, and directly with partners and end customers," Woollen says. "These conversations are the essential way that salespeople are successful. And these are functions that traditionally haven't been automated very well—or at all."

Happily, this is starting to change. One important new development is the increasing number of CRM systems

that use a software-as-a-service (SaaS) delivery model. And the Web interface used by most SaaS vendors has pushed these applications in the direction of speed and utility—of being able to offer up information in an easily digested format. In the case of SaaS implementations of CRM, this has meant providing an entry point to data that more directly serves salespeople's needs.

The Oracle CRM On Demand product, for instance, provides tabs for critical sales information, such as accounts, appointments, opportunities, and forecasts. While a salesperson's use of such a system may provide information his or her manager can also use, that's not the only goal. Another key aim is to make it easier for salespeople themselves to get what they need, and to transform what has historically been a vault—a rather daunting one—into a self-service information repository.

In traditional sales environments, Woollen says, "if you need to create a forecast or send an opportunity to your colleagues, you'd have to determine which of 10 or 20 colleagues to call. Here, that information is two or three mouse clicks away. It's what you'd expect in a Web application."

Indeed, some Web-based CRM systems offer gadgets that make it even simpler for salespeople, from their desktops, to access the information they need. These gadgets are based on the same technology that lets many users see miniaturized "always-on" versions of, for instance, their daily calendars, their local weather and time, or their sports scores on a portal or homepage such as iGoogle. In the case of Oracle and CRM, the five gadgets that are currently downloadable allow salespeople to instantly perform a search of their corporate CRM system; see their contacts, top accounts, and top deals; and determine their performance against a quarterly sales target.

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Oracle, moreover, is among the CRM vendors allowing customers to create their own gadgets. One sales department may want to create something generic, like a calendar of meetings that is always up-to-the-minute and that sits on the user's desktop. A pharmaceutical company, meanwhile, may want to create a gadget displaying the latest healthcare news. And a consumer-electronics company may want to create a gadget displaying blog entries from the chief marketing officer heading into the holiday season, when the company is introducing several new products.

"This really opens up a lot of possibilities in terms of salespeople having the ability to get that little piece of information they need, when they need it," Woollen says. "It allows, at the edges, for a lot more innovation in the systems."

This do-it-yourself capability—enabled by underlying software tools that Oracle is releasing as a matter of course—is also important because, for the most part, CRM-as-a-service is not an application brought in by the information technology department. Indeed, SaaS versions of CRM are generally administered by business users. So while IT may provide some support, it doesn't own these projects in the same way it might own a multimillion-dollar enterprise resource planning project, a companywide operating system upgrade, or a data-center overhaul. Instead, business units usually take responsibility for the day-to-day operation of Web-delivered CRM systems, with an individual—often an executive assistant—serving as the power user.

That CRM systems are increasingly focusing on what salespeople need is also evident in the efforts software companies are making to add mobile connectivity to these systems. The nature of their jobs dictates that good salespeople spend a great deal of time away from the office. While they may not need the ability to connect to a full-blown CRM system from the

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road, there is certainly some information within that system that might help them.

Contact information, summaries of previous communications with a prospect, and a view of the proposal that is up for discussion would all be useful things for a salesperson to be able to access via a mobile device in the spare moment or two before shaking the prospect's hand. Oracle is one of the companies now offering these capabilities. Its mobile applications let users perform many useful tasks, such as sharing information about leads with colleagues; looking up their day's appointments and tasks; jotting down notes that automatically get uploaded to the back-end CRM system; and performing "What if?" analyses on the opportunities in their pipelines.

"Our number one design philosophy on mobile CRM has been that less is more," Woollen says. "If you have an iPhone, do you really want full-blown applications showing up there? You need access only to the very essentials: your deals, your contacts, your forecasts. If you're a salesperson, being able to access your own pipeline, when you're out on the road, is huge."

One last thing that's enhancing CRM's relevance to everyday selling activities is how CRM is starting to incorporate the technologies popularized by social networking sites. Some CRM systems, like Oracle CRM On Demand, now integrate these social networks right into their corporate data feeds, so that a salesperson wanting to learn more about a prospect can access that prospect's LinkedIn or Facebook page.

Newer CRM systems are taking advantage of the social network idea in more fundamental ways. For instance, as part of a lineup of "Social CRM" products, Oracle has developed several applications that run on its enterprise social networking platform. Separate from the Oracle CRM On Demand product, these applications were purpose-built from the ground up to help salespeople within a single company collaborate and close deals based on shared information.

Oracle Sales Prospector, for example, searches reams of sales-data and purchase-history information to guide sales reps to the most likely prospects for a product or service. It informs salespeople via an easily consumable graphical view on those potential deals most likely to close within specific time frames, and estimates the likelihood to close, time to close, and the expected revenue.

Oracle Sales Campaigns, another Social CRM application, lets workers pick from a repository of HTML email campaigns that colleagues have used to get the attention of prospects or maintain client contact between sales calls. The program allows users to quickly see which mailings have been opened most often or had the most clickthroughs. Among the components embedded in the software are ones dedicated to rating, commenting, discussion groups, and tagging—all common social networking services.

Likewise, the company's Sales Library product allows individual users to reach into an inventory of presentations and Word documents, and mix and match

content to create needed presentations or proposals. Oracle Sales Library is a content-sharing system based on the metaphor of Flickr, Yahoo's photo-sharing site. "We're allowing people in the same company to share content with other people they already know and respect," Woollen says. Compared to emailing presentations, "this allows the sharing to happen on a more widespread basis," he adds.

The next step for many CRM vendors may be broadening the networks to include those outside the company, such as partners and even customers. These extended social networks could become feedback loops not just for salespeople, but for marketers and those in the R&D department.

All these developments—current and future—are about turning technology into a tool for the salesperson, as opposed to its being an annoying extra requirement. All salespeople use the Web and many already participate in social networks. For those who do—including most salespeople at the start or in the primes of their careers—providing CRM as a Web-delivered service meshes perfectly with their experience and expectations.

"I do think there is something to be said for the demographic piece—the distinction between technology and what I'll casually call 'air,'" Oracle's Woollen says. For a lot of salespeople, he says, "a social network is not a technology, it's part of the fabric of their

lives. They already work that way—it's a no-brainer. They wonder why we make a big deal of it, quite honestly." ■

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