AHTD CRM Best Practices Roundtable – March 2018

Bringing CRM Value to the Outside Salesforce - Sharing and Leveraging Information

Recently, I hosted a CRM Best Practices Roundtable with several AHTD Members. Most of the group was new to our quarterly session which is always very engaging. My goals remain the same in each session, to get everyone thinking and challenge them on CRM and their sales processes. Doing this will help them get 'that' competitive edge they may be missing, and everyone leaves with take aways to use moving forward.

As we talked through our session, several members brought up two of the most recurrent challenges I hear, "What is the best way to get value out of CRM for our salesforce" and "How do we get their buy in"? These challenges usually go hand in hand. I also heard, our account managers tend to view CRM as a 'watch me' tool; a place to make sure they are doing their job. Coming from a sales management background, I can relate, I have heard the same comment from members of my sales team.

Here are my answers based on your company's current CRM situation:

If you haven't implemented a CRM or if you are in the beginning phases: You need to get them involved early in the process, don't just hand them a CRM log in and say get going. Have them involved in what you are wanting to accomplish. It needs to be a team selling tool! CRM isn't just for managing external data or reporting up. We need to use it CRM as the hub to share and leverage information internally. By internal I mean, companies should be involving inside sales, outside sales (or account managers), marketing and product specialist in the processes and 'WHY' of the CRM. Showing them the "value" of CRM.

If you are at the point where CRM is already in place: You can't engage early and you have new hires coming in or a tenured salesforce who is still not seeing the value. In both cases you ***must*** position the value of the data! It's not just give me your pipeline data and move on. They should understand that the CRM is to help guide efforts as a TEAM sharing data and where their time may be best spent.

> An example of time spent: I am currently working on a CRM market share analysis with a company where we are taking a rifle vs shotgun approach to the data in their CRM. We are looking at the accounts and prioritizing where they should be spending their time. The data can come from several sources: Internally-outside or Inside sales or Externally- by purchasing a market share analysis.

No matter which situation you find yourself in the challenge is the same. How do we show value and get buy in? Going back to my experience in industrial sales, I always wanted information from all the touch points for my customers. What would I have to do to get it? Without CRM, I would have to go around to each department and ask or walk around to desks at the end of the day and scan for notes. Many times, unintentionally, I would miss information that inside sales maybe didn't deem urgent, but that I found important.

If you aren't getting buy in on CRM, I ask you this "Are you truly positioning CRM as a team solution"? It is the easiest ways to show CRM "value" to your outside sales team!

I am hosting two breakout sessions at the AHTD Spring Meeting. If you will be attending I hope to have you join me or at least stop by and say hello. Follow this link to the AHTD website for more information on the sessions. Don't miss out on our next roundtable discussion on CRM best practices, exclusively for AHTD members, June 28 at 10 a.m. CT. Email me at brian.gardner@salesprocess360.com to reserve a spot.