

Chapter 10: Managing Sales Technology and Sales Enablement Successfully

INTRODUCING THE CHAPTER

Technology has dramatically changed how salespeople are managed and how they manage their time and territories. This chapter discusses how technology such as sales technology stacks, mobile phones, wireless broadband, and laptops turn any location into a virtual office. Salespeople use unique technology to manage information ranging from which technician knows how to fix best specific problems to which company white paper piques your prospect's interest.

Salesforce automation (SFA) software was among the first software used by salespeople, and through the use of artificial intelligence, it will perform repetitive tasks. Software designed to support customer relationship management strategies includes many features, including chatbots and voicebots, designed to enhance customer communication and management reporting.

Implementing sales technology is fraught with challenges, such as overcoming the resistance of salespeople when it comes to using new systems, establishing metrics that incentivize changes in their behavior, and managing the quality and quantity of the data entered into the system.

To improve the acceptance and use of various technologies by salespeople, many firms rely on training, managerial support, and technical support. Such activities make the transition to new technology easier for salespeople and their managers.

Chapter Objectives

After completing this chapter, students should be able to:

- Explain what sales enablement is and why sales enablement strategies are essential.
- Explain what salesforce automation technology is and its uses.
- Describe the challenges related to successfully implementing sales technology.
- Describe what sales managers can do to encourage their employees to adopt and effectively utilize sales technology.

Chapter Outline

- I. Sales Technology
- II. Sales Enablement
 - A. Convenience
 - B. Knowledge
 - C. Collaboration
 - D. Access
 - E. Salesforce Automation
 - F. Reports and Analysis
 - G. Team Collaboration
 - H. Customer Relationship Management Strategy

- III. Trends in Sales Technology
 - A. Robust CRM Systems
 - B. Artificial Intelligence
 - 1. Chatbots
 - 2. Voicebots
 - C. Contact Center Software
 - D. Speech Recognition and Call Analytics Technology
 - E. Mobile Technology
 - F. The Internet of Things (IoT)
- IV. The Challenges of Implementing Sales Technology
- V. Sales Technology Training
 - A. Managing Sales Technology Roadmaps
- VI. Managing Your Career
- VII. Summary

MANAGING YOUR CAREER

Most students are very adept at using their personal technology and have personal experiences with various forms of technology and social media. This section asks them to change their focus from a personal focus to a more professional focus. A conversation on what this means and what changes might be required can be very enlightening. Also, encourage your students to think which skills, certifications, and sales technology experiences will give them a competitive advantage when seeking career opportunities.

SUPPLEMENTAL VIDEOS DISCUSSION SUGGESTIONS

Sales Influence – Why People Buy (podcast with Victor Antonio): Aaron and Victor discuss how sales managers can use data to better create sales processes and strategies. Further, they discuss how to create systems and a culture that is designed to increase predictable sales results by providing consistent, scalable services that allow customer-facing professionals and their managers to add value in every customer interaction. The video provides real-life examples of how sales managers can use sales technology to coach sales representatives.

6 Sales Tools: The right sales tools can make all the difference in sales performance. Just like Batman needs his utility belt or a track star needs the right shoes, sales representatives are most productive when they have the right sales tools and sales technology stack. Here are the six tools discussed in the video:

1. [00:17] **CRM Platform**
2. [01:14] **Sales Readiness Platform:** Sales readiness tools deliver the training, coaching, and practice content.
3. [01:54] **Social Media:** Social channels are essential for positioning your reps as trusted advisors and connecting to customers on a human level.
4. [02:24] **Sales Engagement Platform:** Sales engagement tools help you with buyer interactions.

5. [03:15] **Sales Enablement Platform:** This platform empowers reps with the content, training, and guidance they need to elevate customer conversations.
6. [04:20] **Productivity Tools**

4 Attitudes toward Digital Technology Adoption: This video explores the attitudes that sales managers encounter when introducing new technology to sales representatives. It also discusses effective strategies on how to manage sales representatives' attitudes to facilitate adoption.

QUESTIONS AND PROBLEMS

1. **Based on Doug Pace's profile at the beginning of the chapter, what challenges does a sales manager who is trying to incorporate new technologies into the sale process face?**

Doug Pace states that change is often accompanied by a resistance to change. It is important that sales managers communicate to their salespeople the purpose of adopting new technology and its benefits to them. The technology must be seen as an enabler and a help.

2. **Explain the concept and benefits of sales enablement from the customer's perspective versus a salesperson's perspective.**

Students should explain that customers will view sales enablement as improving purchasing and re-purchasing convenience. It provides customers with multiple ways to purchase products. Further, sales enablement will provide knowledge and information that is specific to their situation, increased collaboration or integration between the buying organization's functions and the selling organization pre- and post-purchase. Sales enablement will also increase the access that customers have to service and support from the organization.

When viewing SFA from the salesperson's point of view, students should mention that sales enablement is a tool that will help keep their efficiency and allow them to focus on selling. Further, sales enablement tools will organize and present information in such a way that very little, if anything, is missed or overlooked. Sales enablement has the potential to increase the number of customers and size of sales that a sales representative can support.

3. **Compare the sales process of a salesperson who is working with the benefit of SFA with the sales process of a salesperson who is not. What are the disadvantages of not using SFA?**

When students are answering this question, they should make the distinction that manual processes require a significant amount of time and can be inefficient. SFA increases the salesperson's efficiency and responsiveness to customers. Further, it allows them to focus and spend more time on activities that more directly increase sales revenues. Possible sales tasks that can be automated include training, checking in with management, reporting and analysis, team collaboration, opportunity management, lead generation and prospecting, task management, and entering data.

4. **SFA implementation is not without challenges. Identify some of them from the perspectives of salespeople and their managers.**

It is important for students to answer the question from the two different perspectives. For example, the manager is concerned about how implementation affects the organization, so the managerial issues

listed by the student should discuss how the various stakeholders of the organization are affected by SFA, i.e., training and adoption by the salespeople, changes in customer services, changes to salesforce management including salesforce evaluation and hiring. When reviewing SFA from the salesperson's perspective, the student should discuss how SFA will change the salesperson's daily task and relationship with the customer.

5. What is the purpose of a CRM system? List the benefits from the perspectives of sales representatives, sales managers, and sales executives? What information would you expect to see in such a database? What information should not be included?

CRM solutions help sales, marketing, and customer service professionals personalize their interactions with customers, provide opportunities for multichannel communications, offer data and analytics about the customer's journey. The benefits for the sales representative include, but are not limited to, efficiencies in dealing with customers, immediate access to customer and prospect data, as well as having an effective tool for time management. Sales managers also have instant access to sales representatives and customer activity. Managers can also use CRM to coach sales representatives and develop more accurate forecasts. Sales executives can get a quick overview of the organization's performance and activity. Further, it allows the sales executive to develop strategies that are data-based. Sales executives can also "mine" the data to gain new insight as to how to improve business operations.

6. Using your crystal ball, what technology trends do you see in the near future? How does this impact the role of the salesforce?

Encourage students to do a google search on sales technology or digital technology in general. Students should look for technology that would improve communication, increase time efficiency, and gain insight on potential customers. Students should relate how the future technologies automate aspects of the sales process.

7. One barrier to the full use of CRM software is that sales managers sometimes don't understand how they can use CRM for more than just tracking the activities and performance of salespeople. As a result, the sales managers expect their salespeople to learn and use the technology more fully than they do themselves. If you were a sales executive, how would you overcome this barrier?

Students' answers should include activities that address accountability and frequency of usage. Examples should include such things as including CRM results in executive meetings, using CRM data to make daily business decisions.

8. Considering a company with a global salesforce, what accommodations can be made to help make sure the representatives are "pulled into" the organization's sales technology?

When answering this question, students should consider that the dispersion of technology differs globally. Accommodations should be made based on bridging the gap on cultural differences and availability of technology. For example, spreadsheets that can be uploaded into the system might be an accommodation that could be made for countries that do not have the infrastructure to support CRM. Also, training classes should be developed for those countries on technologies that are specific for their country.

9. You encourage your salespeople to use social media to find new potential buyers, to learn what is on their minds, and for other such applications. You follow your salespeople on Twitter and LinkedIn and have seen some disturbing tweets and posts. One salesperson tweeted: *How much beer can I drink? Find out after the sales meeting Monday! #blitzedagain #coparty*. Another posted a beach-and-bikini profile photo on LinkedIn. These are just a few examples of what has bothered you, but your company has no policies on social media use. What do you do?

Students should talk through how they would develop a corporate policy. Further, they should indicate that they would talk with the representative and discuss how such posts hurt their ability to connect with prospects and generate more sales. The students should provide specific examples of why the posts are detrimental. It is important to note that, because there is no policy in place, punitive actions cannot be taken until a policy is in place.

10. What fairness issues are involved for a salesforce with 24/7 connectivity? Would your perspective of what is fair change if your sales staff were paid a straight salary versus a straight commission? Why or why not?

Students should discuss the need for boundaries and compliance with organizational policy. They should also discuss how the boundaries may differ between the representative and their manager versus their customer. The autonomy of the sales representative should be discussed with regard to straight salary versus commission. Specifically, how the level of autonomy affects how the boundaries of accessibility are drawn. You would expect that those paid on straight commission would have more control on setting boundaries concerning accessibility than those that are paid a straight salary.

11. What steps do sales managers in a small organization without a dedicated information technology department need to take to ensure their salespeople benefit from sales technology?

Students should point to cloud-based software systems that have IT support associated with the technology. Further, they should look at the training and support services offered by those companies and the different modes of communication that are available through their customer support.

ROLE PLAY

SASO Analytics

Organize the students into groups of three and assign one of the following roles to each student: VP of Marketing, VP of Sales for solutions, and VP of sales for services. Prior to starting the role play, the students should briefly review the responsibilities of their department and how they currently interface with the other departments. Next, they should list three ways in which customer efficiencies will be improved if they were responsible for the account. Prior to the role play, students should consider their answers to the following questions:

1. What are the benefits to the other departments if they took responsibility for the account?
2. What sort of information and analysis will you need from the other departments in the CRM system to effectively operate your department?

3. What role would other departments play in managing customer relationship if your departments were in charge of the account?

Assign a different method of customer categorization to each group and have the groups discuss how ownership of customer accounts would change. For example, one group can look at customer “size” as a categorization of customers while another group considers categorizing customer accounts by their sales potential or customer lifetime value. If time permits have each group report their solutions.

ANSWERS FOR CHAPTER CASELETS

Caselet 10.1: Bainbridge Solutions

Case Questions:

1. **Should Mike create penalties for not using the new program or rewards for using it?**

Students should discuss how, after training, using the technology should be an expectation. Using the technology should yield rewards in higher sales. Mike should look for ways to require the software usage in their daily operations.

2. **How can he make sure managers get trained?**

Students should discuss how most software companies offer free online training or provide additional customer support. Given the amount of money Mike spent on the software, it is highly unlikely that a service contract does not accompany the purchase. Another option is to train someone internally and have them train the other sales managers.

Caselet 10.2: Zeron Corporation

Case Question:

1. **If you were a sales manager for Zeron, how would you go about developing a rules-based campaign covering all 120,000 e-mail addresses?**

Students should focus on how the rules for handling the e-mail addresses should affect sales and sales prospecting. Their answer should focus on how to filter the e-mails so that sales representatives can use them to prospect and/or develop small customers into larger customers. Possible solutions students could present would be as follows: Separate by type of customer or where they are in customer journey. For example, feedstore and trainers would get an e-mail that would target how the website could meet the needs of their specific industry and direct them to the appropriate website, while the other 60,000 e-mails collected at the website would receive an e-mail asking about their interests and purchasing behavior. If the purchasing size is significant, then the e-mail should be directed to a sales representative for follow-up.

Caselet 10.3: Greseth-Jackson Manufacturing

Case Questions:

- 1. Put yourself in Dean's position and, based on what you know, develop a technology roadmap for introducing CRM.**
 - a. Students should develop roadmaps that discuss how people processes and tools would have to be changed or adapted to effectively utilize the technology.
 - b. Students should discuss what goals are sought in terms of people and their productivity, the responsiveness of the processes, and how other tools used by the business will be integrated into the system.

- 2. What information would be compelling in getting Dean to move forward? What do you anticipate some of his concerns might be?**

Students should present or talk through information/data across the three areas that might be compelling to Dean. For example, information around improved workplace happiness or organizational commitment when work processes are streamlined, information that addresses the elimination or reduction of bottlenecks in the process or how tools can be more effectively used to help the sales representative respond to customers better. Students should refer back to the case to gain insight into Dean's concern. His reluctance to move forward without a clear strategy would suggest that execution against goals is important. Therefore, he would be concerned that the organization would move forward without any clear goals or strategy for implementation. Students should list specific goals that must be defined and outline the characteristics of a successful strategy. Things like cost or time to implement were not the concerns Dean mentioned in his rebuttal to the president.

OTHER IN-CLASS EXERCISES

Building a Technology Stack

Divide students into groups of three or four people and assign each group a step of the sales process (i.e., one group will be assigned prospecting, another getting the first meeting, etc.). Each group should search the Internet and identify at least three technologies that could make their assigned step more efficient or automated. Encourage the students to be specific and not generalize. For example, mobile phone or Salesforce is too general. However, Coveo — an AI-powered search and recommend system app — within Salesforce would be the right level of specificity. Once students have selected the three technologies, they should present their findings to the larger group along with their justification for making the selection.

Capitalizing on Future Trends

Divide students into groups of three or four people and ask each group to identify a technical trend that could impact sales, i.e., digital trust and block chain, augmented reality, Internet of Things. Doing online research, the groups should briefly describe how the new technology will affect the duties of the sales representative and the manager. Each group should report back with their predictions on how the technology could be used by sales representatives and sales managers.