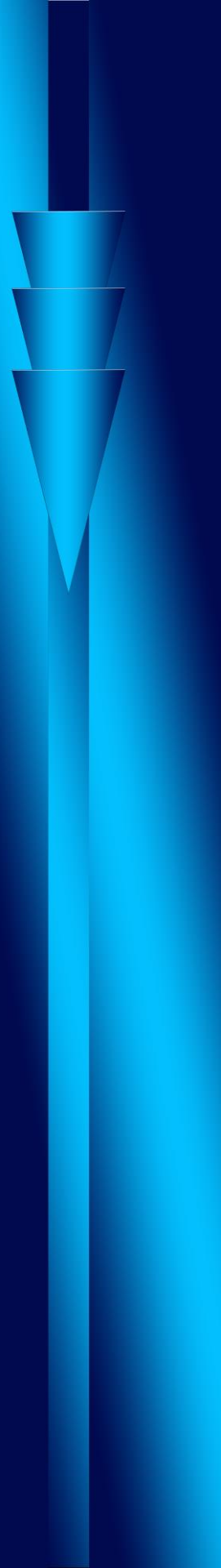# WHITE PAPER

Excellence in Sales Workflow Management:

Eliminating Friction

mobileforce

February 2016

Traditional sales methodologies are undergoing a period of intense transformation as the proliferation and accessibility of information and new technologies change the landscape of the sales ecosystem. There is no reason to expect that this evolutionary process is going to slow down. In fact, old paradigms (sales funnel) are being replaced by new ones (mapping sales stage to the "buyer's journey"). This, combined with the API economy which now has the ability to intelligently push timely, contextually relevant information and eliminate borders between applications, means the velocity of change in the sales environment will only continue to accelerate.
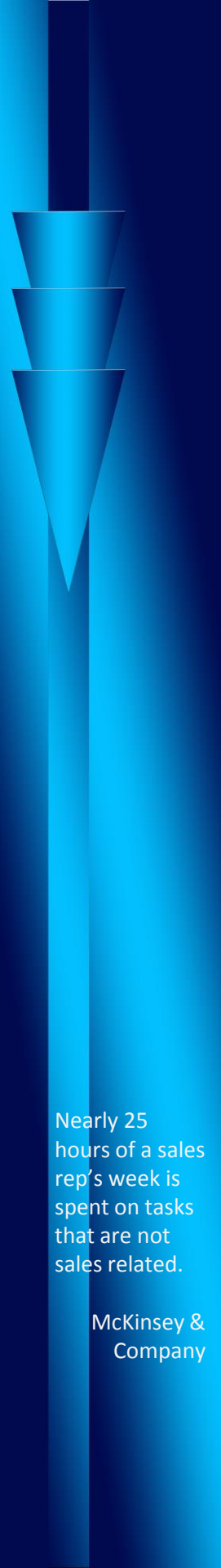
Friction Means Deceleration

With these changes in the sales environment comes new pain points and new areas of friction. It is important to think about every step your prospects/customers must go through to do business with you. Response latency, as well as every additional document, meeting, phone call, click, or decision in the sales process creates friction. And every single point of friction causes deceleration, reducing your chances of winning the deal. History has shown that even when your competitor's product is inferior (or priced higher), if they are able to make the buying process drop-dead simple, you will likely lose customers that should be yours.

There is almost universal agreement that organizational complexity creates tremendous amounts of friction for the sales organization – making it harder to get things done than necessary. However, studies indicate that few executives have a realistic understanding of how complexity actually creates sales deceleration in their own companies. When challenged, many leaders point to the institutional manifestations of complexity they personally experience: the number of countries the company operates in, for instance, or the number of products or people they manage. By contrast, relatively few executives consider the forms of individual complexity that the vast majority of sales reps face—for example poor processes, confusing role definitions, or unclear accountabilities.

"This is not a trivial difference in perception. Our experience suggests that such a disconnect highlights a blind spot many executives have when it

comes to managing complexity effectively. A focus on institutional complexity at the expense of the individual kind can lead to wasted effort or even organizational damage. What's more, failing to tackle complexity as most people experience it can, as we've shown before, be financially costly." (1)

Sales reps struggle with the various manifestations of individual complexity every day. Examples include; processes which at one time had been effective, but over time have become increasingly bureaucratic, or fail to work at all. They experience frustration with how long it takes to complete a task, find relevant information, and make decisions when reasonable, less time consuming alternatives seem to be at hand. Role duplication, combined with unclear role definitions only exacerbates the problem. The result is too much time spent on managing internal processes and not enough on understanding customers' needs.

Common Areas of Sales Friction

- Organizational Processes: These are friction points within the organization, but outside the control of sales management. This can include topical issues such contracts/contract language, exception handling and sign-off, and mis- or non-aligned departments (i.e., training, service delivery) when it comes to ideal sales processes and handoffs.

- Buyer Processes: These are friction points in the buyer's processes that are outside the selling organization's control (however, they may within the selling organization's influence). They could include buying process delays, changes in Budget, Authority, Need, Timeframe (BANT), mis-mapping or gaps in guided sales, as well as appropriate stage information and tasks relative to the buying and selling processes.

- Sales Processes: These are friction points within the complete control of the sales organization. They can include both organizational issues such as finding content, guided sales processes, enablement, and information gaps, as well as individual issues such as timely responses, lack of trust, or perceived lack of competence of the sales rep by the prospect/customer.

Nearly 25 hours of a sales rep's week is spent on tasks that are not sales related.

McKinsey & Company

(1) mckinsey.com, "Cracking the Complexity Code"

Removing Friction is More Effective than Applying Force

Applying greater force . . . pushing harder, demanding explanations, cajoling prospects/customers, and clamoring for reps to "just close the deal" are not going to produce long-term benefits. Moreover, brute force is neither cost effective nor scalable and tends to create widespread collateral damage. Today's sales leaders are under tremendous pressure to remove systemic friction from their organization to increase both top and bottom line results and new solutions must be found to remove friction.

"The leading cause of stress among business-to-business (B2B) sales managers is the friction that builds up in managing their pipeline, and extends sales cycles beyond predicted norms. This results in both missed quotas and poor customer experiences." (2)

It is, therefore, imperative that sales leaders work to design an integrated and improved experience that considers both the prospect/customer and the sales rep. Recent history shows us that companies that don't treat this with the sense of urgency it deserves to evolve quickly can seriously jeopardize the entire future of their business.

CRM is a Valuable Tool, But It's Not Enough

CRM is an important tool for sales organizations, but it does not provide the enablement capabilities required in today's increasingly sophisticated market. Utilizing a tool that provides activity-based enablement and dynamically-guided selling principles goes a long way in reducing sales process friction by providing each sales rep content and information at their fingertips based on the specific buying stage of the prospect/customer at any point in time. The bottom line is that it creates better outcomes in both conversion and productivity.

According to Aberdeen Group, "on average, 24% of all 'sure-thing' sales deals — current customer relationship management (CRM) opportunities deemed 80% or more likely to close in the current month — eventually slip out of the real-time forecast into subsequent selling windows . . . or actually don't ever close at all."(3) This is because CRM is too often viewed as "an

(2)   Aberdeen Group, "Sales Effectiveness 2015: How in the World are We Going to Hit our Number"
(3)   Aberdeen Group, "Sales Playbooks: Taking the Guesswork out of Sales Enablement"

Research shows that 70 to 80 percent of the time, under-performance is due to environmental rather than individual factors.

Robert Koehler
LinkedIn

all-encompassing panacea."(4) However, CRM as an individual application does nothing to create acceleration.

"When organizations limit their sales effectiveness technology investment to CRM, they may benefit from its contact management and collaborative features, but for the most part, the platform just organizes information."(5)

In today's environment, sales reps must be equipped with the ability to respond quickly and completely to a prospect's/customer's queries. How efficiently and effectively they do so can be the difference between getting an order and losing a customer. Empowering your sales reps with the tools that allow prospects/customers to "make a purchase decision with the least investment of time possible, in order to move more rapidly through the buying cycle, creates real value for buyers, lays the foundation for a trust-based relationship, and truly differentiate yourself from your competitors." (6)

Viewing the Battleground from Two Perspectives

Sales organizations are facing a growing market challenge to not only increase top line contribution, but to do so in an environment where market participants are equipped with countless ways to connect with information, brands and people by increasingly sophisticated means. This is not only a consideration that must be viewed through the eyes of the prospect/customer, but must also be seriously evaluated from the viewpoint of the organization's sales reps.

It goes without saying that turnover in a sales organization, especially of top producers, can undermine organizational goals. However, it must be understood that your sales reps, through exposure to products from the likes of Google and Apple, are increasingly expecting tools that are simple, fast, "intelligent" and seamlessly integrated into their workflow in order to effectively do their jobs on an increasingly sophisticated and competitive playing field.

CRM adoption rates across all sales organizations remains a tremendous challenge -- only 30% to 45% adopt -- according to numerous studies.
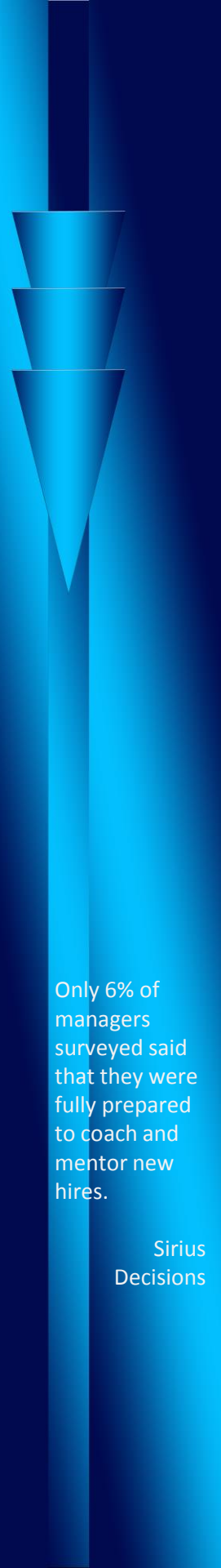
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According to Gartner calculations, up to $9 billion is essentially wasted on CRM solutions.

(3)   Aberdeen Group, "Sales Playbooks: Taking the Guesswork out of Sales Enablement"
(4)   ibid
(5)   Paul, Andy, "Amp Up Your Sales: Powerful Strategies That Move Customers to Make Fast, Favorable Decisions", American Management Association

The battle is on for both customers and the best sales reps. Sales leaders that can eliminate unnecessary friction in all of its forms and deliver superior selling environments for sales reps will be at a huge advantage. In such an environment, these organizations will achieve their top and bottom line growth goals achieved, and also have the opportunity to cherry pick the best sales professionals to come to their team.

Here are seven best practices to help you succeed in removing friction and transforming your sales organization into the high-producing team you know it can be.

1. Define the role of a sales person in your organization.
2. Define each sales persona (note: this should extend to channel partner personas if your organization utilizes indirect sales channels).
3. Observe and understand each of the sales personas, paying particular attention to processes and friction points.
4. Map the ideal processes for each persona based on findings.
5. Determine how to minimize low-value tasks
6. Be diligent and stay on track. Prevent drift and fragmentation.
7. Prioritize and deliver.

Based on our experience with leading global brands, we recommend solving one or two friction points at a time in order to be successful in your efforts. This has, at a minimum, two benefits:

- It eliminates implementation paralysis that takes hold when you try to do too much at one time
- It allows you to quickly prove success, which has the further benefit of creating excitement across not only the sales organization, but the entire company.

In the end, taking steps to remove friction is first and foremost about attitude. It's a team approach that will involve many and gives everyone in the organization a support role in ensuring that the friction that impedes the sale's organizations forward movement remains at bay. By doing so, you will experience greater win rates, increased funnel velocity, higher levels of customer satisfaction, and more.

For more information:
Contact: info@mobileforcesoftware.com.

Only 6% of managers surveyed said that they were fully prepared to coach and mentor new hires.

Sirius Decisions

About MobileForce Software

MobileForce Software's cloud-based Infinity platform is the foundation of successful sales organizations everywhere – from emerging businesses to sophisticated global organizations.

MobileForce Software's technology features a simple and easy process to bring an array of applications, content and information together, contextually, across all devices within a single, unified application. Providing an easy, highly-intuitive user interface; and a comprehensive, feature-rich solution set, MobileForce raises the bar by automating sales workflows that create superior productivity gains, as well as tremendous competitive and strategic advantage for every sales organization.

MobileForce Software is headquartered in Sunnyvale, California with offices in Dallas, Texas and Bangalore, India.

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