

# 2010

## Increase Sales Productivity:

Sales Tools and the path to productivity gains



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# Increase Sales Productivity in 2010:

## Sales tools and the path to productivity gains

### Table of Contents

● Introduction	6
● The 215 Movement	11
● The path to productivity gains: where to start	13
● Collaboration	20
● Sales Leads Tools	27
● Sales Enablement	39
● Productivity and Time-Saving Tools	49
● Inside Sales Tools	58
● Sales Follow-up Tools	64
● Multi-Media Presentation Tools	75
● Sales Management Tools	79
● Summary	99
● Appendix A - Trusted Resources	102
● Appendix B - Fill the Funnel	103

## Introduction

You're in business to provide a product or a service to people. You sell something that others want (or you believe they want). Your business success is directly related to how much you can sell.

The more you sell, the more successful your business. Yes, there are other factors: Good customer service, efficient manufacturing, managing costs. However, as the saying goes, "Nothing happens until something gets sold".

This report sets out to answer the most important question of all – "How do you sell more?"

How do you get from where your sales are now to where you want them to be in the future? There are many paths to follow, and the fact is you'll need to walk down each of them at some point on your journey.

One path to increased sales is to help your sales reps become more knowledgeable. There are plenty of great articles and books to better inform salespeople about selling techniques. If you're looking for inspiration, you'll find oodles of audio programs to pump you up. And, if you zoom out for a broad look at the world of sales you'll find there are incredibly talented and knowledgeable consultants to help you develop over-arching strategies designed to help your company sell more. These are important tools that help us become better and sell more.

We can also strive to improve specific sales skills; how to ask the right questions of your prospect, how to conduct effective cold-calling, how to write better proposals, how to create and deliver persuasive presentations.

And we can give our reps better product training so they're better able to describe both the value proposition and the competitive position.

I certainly advocate investing in training and sales strategy development. In the back of this e-book is a list of [trusted resources](#) showing some of the industry's best, most-respected individuals and firms who offer resources on their sites and blogs that complement their consultative services. Take advantage of their articles and participate in their webinars. Many are offered for free.

The second path to greater sales is to hire more sales reps. However, few of us can afford to take this path in today's economic environment. Apart from higher costs, hiring more reps often has a demoralizing affect on your existing sales reps who will inevitably have fewer prospects and smaller territories as a result.

The third path to increased sales is to introduce new products and services. Give your customers more to buy from you. However, your prospects may simply forego the old products in favor of the new ones over fixed budgets or a perceived lack of need for buying both the old and new. Thus, the phenomenon often referred to as cannibalism where the old product sales are eaten up by the new products.

Many companies simply don't have the product development resources to invest.

The fourth path is often irresistible to sales managers. Unlike the other paths, it requires no financial investment, only that we ask – rather demand – more from our salespeople. It's hard to spend money; it's easy to apply more pressure.

Demand that your reps increase their activity: The number of phone calls, the number of meetings and the number of proposals. Demand that your reps work more hours, update their forecasts more often and submit more cal reports.

Demanding more is often the only path a company can take. We'll show you how to make the “demand for more sales” more constructive and effective because, as my friend Scott Messer of consulting firm Sales Evolution says, “Hope is not a sales strategy”.

Certainly there are times when demanding more from salespeople has been effective. In fact, the salary-plus-commission compensation model has, at its foundation, an implied demand (this is your quota) tied to an award (this is what you get if you sell as much as we ask you to sell).

And because that works, when we want even more sales we cut territories. Now the rep has to sell more in order to earn the same amount of commissions, the equivalent of demanding even more. Or we raise the quota which essentially reduces the commission rate. Again, the rep has to sell more in order to earn the same amount of commissions.

But demanding more is only effective up to a point. The reality is that we're dealing with the human factor, and humans are limited in their ability to simply "do more." There are a limited amount of hours in the day as well as a limited amount of both physical and mental energy.

It's difficult to simply "do more" when there are only 24 hours in a day and presumably, sales reps only work during 8-12 of them.

***We need to provide reps with tools that will help them meet or exceed our demands.***

The key to increasing sales productivity in 2010 is to understand what tasks and activities keep reps from spending more time in front of prospects. This report gets down-and-dirty, providing detailed examples of how sales reps spend their time and how to accomplish more by deploying the right tools.

A sales rep's time is divided into two types of activities: "Selling activities" which mean we're on the phone with, or in front of, a prospective customer and "non-selling activities," most of which are necessary for closing business but keep us from spending time with prospects.

Non-selling activities include such administrative tasks as compiling expense reports, planning our travel, reconciling our commission statements, attending staff meetings, coordinating meetings, mailing documents, entering new contacts into a database, finding a needed file, searching the Web for prospects, compiling research on a prospect and a whole lot more.

What would happen if all the non-selling activities magically disappeared, allowing your reps to spend 100% of their time in front of a customer?

If we added non-selling activities back into the equation one-at-a-time we'd be hyper-aware of the impact each had on the amount of time spent with customers. It's because these tasks are so deeply embedded in our routines already that we don't recognize their impact on selling time. Or we recognize them but have come to accept them as part of (sales) life.

As sales managers, don't we owe it to our team to consider this impact on selling time as a critical factor when we make such decisions as deploying a new technology or sales process? We ask how much something costs. We ask how much time it will take to implement. We ask whether we will get value from it, but we don't often ask how it will impact time with prospects nor look for ways to mitigate any negative impact.

Shouldn't we judge all things to some degree by the impact they have on time spent with prospects? We did the math.

## Chapter 1

*Sales reps have only 18 days a month when they can pursue, advance and close a sale.* ””

### The 215 Movement

There are 365 days in the year. No surprise there, but let's think through how much of that time is really available to sell. It breaks down like this:

- 104 weekend days
- 15 vacation and sick days
- 24 days for non-selling meetings (e.g. internal sales meetings & events), training and travel time
- 7 paid holiday days

That leaves 215 days sales reps can spend selling. On average then, sales reps have only 18 days a month when they can pursue, advance and close a sale.

But wait. Within those same 18 days a month they often must follow-up on a delivery, straighten out an invoicing mistake, help their clients resolve issues or perform any one of a list of non-selling but crucial tasks.

Sales reps have to be superhuman. We expect them to find prospects (or sift through a “lead” list), determine how to contact them and attempt the contact, then keep attempting until they get through. But first they must learn a little about the prospect’s business in order to appear knowledgeable and credible. They need to close on an appointment, or at least draw the prospect’s interest and determine when to call next. Then they have to remember to call and decide what to send via e-mail and achieve just the right amount of communication – not too little, not too much.

*Demanding more from our sales reps is unfair, unreasonable and unproductive unless we can preserve more of their 215 for selling.*

Once they have an appointment, they need to prepare the collateral, find and print directions, make sure they have all the hardware they need and plan the objectives for the meeting. They may need to prepare a presentation, and it better not be too generic or the prospect will quickly lose interest.

Performing the tasks described above takes valuable time away from the 18 available selling days per month. How much of “the 215” over a year’s time is left over for actual selling?

The point is there are inflection points where we can – and should – figure out how to protect “the 215.” Can some tasks be delegated? Can we deploy better systems or processes? For example, if we constructed the territories differently, could we cut down on travel and down time? ([see Mapping Analytics free report](#))

Demanding more from our sales reps is unfair, unreasonable and unproductive unless we can preserve more of their 215 for selling. It’s obvious that something’s gotta change. That “something” is the way they spend their time. As Einstein reportedly said, “The definition of insanity is doing the same thing over and over and expecting different results.” If we ask sales reps to keep doing the same things but insist they get a different outcome – more sales – well, that’s just a little bit insane.

The good news is there are lots of sales tools that help us change the way we do things. Investing in just a handful of those can dramatically change the amount of time your sales reps have to close sales. Make it a mission to protect “the 215.” It’s your job to eliminate barriers – to block and tackle so your reps are free to carry the ball across the end zone. It’s your job to increase sales productivity in 2010. Protect “the 215” and get the job done.

## Chapter Two

*The biggest worry you should have about using spreadsheets is reliability.*

### The path to productivity gains: where to start

What comes to mind when you see the words “sales software” or “sales force software”? Are you envisioning something that helps your reps manage their contacts, to-do's and deals? That's what most people think of and that's a good place to start. This type of software is referred to as sales force automation (SFA), customer relationship management (CRM) or sometimes contact management software. I'll use the term CRM as a generic term.

If you don't use a CRM program now, it's likely that you use some other kind of system. Many smaller companies use Microsoft Excel for this purpose; it is easy to figure out and the cost is low (it's already on most computers). With Excel, each individual spreadsheet or worksheet can represent a prospect or company. Prospects' names and contact details, opportunity details and notes all can be easily added to a worksheet. In fact, you can get quite sophisticated with Excel.

The biggest worry you should have about using spreadsheets is reliability. On occasion you'll get a corrupted formula. If the total for forecasted revenue is computed using a corrupted formula, you'll make decisions based on erroneous data. Other concerns: You need to backup your files to prevent loss of information and also make sure everyone uses the most up-to-date document.

In my view, there is no reason why a company should still be using Excel for contact management and forecasting purposes – not even cost. Several companies offer free CRM products such as SugarCRM, FreeCRM and Zoho.

## The path to productivity gains: where to start

*Recognizing that there is a cost associated with trying something new, i.e. time, there may be an even greater cost in not changing.*

Recognizing that there is a cost associated with trying something new, i.e. time, there may be an even greater cost in not changing. It's worth it to "sharpen the ax" as the following parable teaches.

*Ben was a lumberjack who swung his ax with great power. He could fell a tree in 20 strokes, and in the first few days he produced twice as much lumber as anyone else. By week's end, Ben was working even harder, but somehow, his lead was dwindling.*

*One friend suggested he swing harder. Another said he had to work longer. Neither idea worked. Finally, an old fellow asked Ben if he had stopped and sharpened his ax. Ben said he had no time; there was too much to be done.*

Stop and take the time to investigate, buy and deploy CRM software. Here's what CRM software can do for you.

### Contact Database

Keep track of names, accounts, phone numbers, addresses, e-mails, location, industry, assigned sales rep and other attributes of your choice. You can import existing data into your new CRM system. Typically, you do this by first converting your data from an Excel spreadsheet to a CSV file type. It's simple: You just do a file>save as> file type>CSV.

The path to productivity gains: where to start

*Reports can be generated almost with the click of one button.*

### Opportunity Manager

Enter opportunities (deals you're working on) for each prospect. Details such as amount, product name, product type, forecast date, closed date and lost deals allow you to manage your pipeline. You can quickly see how much revenue you're expecting and the odds of closing. Many sales reps will use their opportunity list as their main reference when planning their daily activities.

### Task Manager

Track your interaction with contacts. Schedule follow-up phone calls, sales meetings, e-mails and to-dos. Check-off completed tasks, view your to-do list, send e-mails and view contact history. With every contact, you can easily see at-a-glance the history and content of your conversations and notes.

### Sales Management

Easy report generation is usually built in to CRM systems. Reports can be generated almost with the click of one button. See each sales rep's activities, how much revenue they each expect to close and when, where each deal (opportunity) is in the sales cycle and which products they expect to sell.

Most CRM programs include such reports as Top 10 Open Opportunities, Opportunities by product category, Total Opportunities per Sales Rep and Probability Reports.

In addition to the standard reports, many systems let you create customized reports.

## The path to productivity gains: where to start

*Look for the CRM that is the easiest to learn and use and one that allows you to add functionality*

### Choosing CRM software:

There are many opinions about the right way to select and implement CRM. And there are an equal number of studies that show poor adoption of CRM (sales reps aren't using it). If you have little time or money and simple needs, keep your selection process simple.

You'll find that most – if not all – CRM products have the fundamental features listed above. Others add a great deal more bells and whistles.

Look for the CRM that is the easiest to learn and use and one that allows you to add functionality if – and when – you need it. Start by outlining your minimum needs as you see them today and what you think you will likely need a year, two or three from now.

There are over 100 CRM products and you can't possibly evaluate all of them. So to help you start your investigation, we've compiled a comparison chart for eight CRM products. They all have the basic features: Contact management, forecasting, task management and sales management. The chart on page 18 lists their price and shows whether they have any of four additional features:

### Lead Routing

Lead routing means that contact information (a lead) captured by a form on your website is automatically entered into the CRM system. Then, based on pre-defined criteria such as zip code, the lead is automatically assigned in the CRM system to a specific rep for follow-up.

## The path to productivity gains: where to start

*You can activate a string of follow-ups that occur automatically without further intervention.*

### Collateral Management

Collateral management is the ability to post your brochures, spec sheets and other digital marketing materials within the CRM system for easy access by sales reps. Asset management assures that the most-up-to-date materials are readily available for sales reps to use.

### Sequential, Automated Follow-up

This is an extremely valuable feature because it's a huge time-saver and at the same time it helps you stay in front of your prospects. For example, say you've just finished a cold call with someone who requests information. You can activate a string of follow-ups that occur automatically without further intervention. Perhaps the first e-mail is a "thanks for your time." The second e-mail contains a webinar link and is set to go out automatically one week later. A third e-mail follow-up is set to go out one week after that.

### Knowledge Management

This capability means sales reps have some way of sharing and retrieving information when they need it. It could be in the form of a Wiki<sup>1</sup>, a blog<sup>2</sup> or a standard directory with files and folders.

<sup>1</sup> Web site that allows users to add and update content on the site using their own Web browser.

<sup>2</sup> Short for "Web Log," this term refers to a list of journal entries posted on a Web page.

The path to productivity gains: where to start

### Comparison of SFA/CRM Software Solutions

SFA/CRM Comparisons	Salesforce.com Pro Edition	SugarCRM Professional Edition	ACT! By Sage Premium	NetSuite
Cost	\$65/user/mo	\$360/user/year	\$400/user/year	\$99/user/year + \$499 start-up fee
Campaign Mgt	Yes add'l fee	Yes	Yes	Yes
Sequential, automated follow-up	Yes	Yes	Yes	Yes
Collateral Mgt	Yes	Yes	Yes	Yes
Knowledge Sharing	Yes	Yes	No	Yes

SFA/CRM Comparisons	SalesNexus Pro Edition	SalesJunction	SageCRM SaaS Edition	Goldmine Enterprise Edition
Cost	\$499/year/user	\$25/mo/user	\$69/user/mo	undisclosed
Campaign Mgt	Yes	Yes	Yes	Yes
Sequential, automated follow-up	Yes	No	No	No
Collateral Mgt	Yes	Yes	Yes	Yes
Knowledge Sharing	Yes	Yes	\$3/mo add'l	No

## The path to productivity gains: where to start

*Instead of using a CRM program as an independent system, it's possible to get CRM capabilities from within Microsoft Outlook.*

I've outlined typical CRM programs with typical CRM capabilities. However, there's one more approach to CRM. Instead of using a CRM program as an independent system, it's possible to get CRM capabilities from within Microsoft Outlook. If you and your team use Microsoft Outlook for mail, tasks and calendars, you might find this a desirable approach.

A handful of companies offer this type of system. The benefit is that your sales reps are already familiar with the Outlook interface, so learning time could be substantially less. In addition, reps might feel more comfortable and at ease because of their familiarity with Outlook.

And yet another big advantage is that e-mail and contacts in your Outlook program are connected to their respective contact records. Most other CRM programs require you to synchronize the data between them and Outlook.

Products that fit this category of CRM are Prophet's Avidian, SalesOutlook and TeamScope. Microsoft has its own add-on to Outlook called Business Contact Manager. You can purchase it separately for \$149.95 or bundled with Microsoft Outlook or Microsoft Office.

## Chapter 3

*Assuming the rep works an average of 10 hours per day, nine hours of unproductive time amounts to nearly one full day*

### Collaboration

#### Overview

Sales opportunities usually involve lots of people in a company besides the sales rep – technical consultants, product managers, customer service agents, sales operations staff and sales management. It's typical for critical information to be fragmented across the multiple communication channels they use like e-mail, Instant Messaging, phone calls and meetings and the many documents they share like PowerPoint presentations, RFPs, visit reports and more<sup>3</sup>.

What if a rep didn't have to walk down the hall, send an e-mail (and wait for a response) or leave a voicemail (and wait for a return call) to get the information s/he was looking for from their colleague? How much productive time is lost with that sort of back-and-forth?

Let's give it a conservative number such as 2.5 minutes a day. Do the math and that's 2.5 minutes a day across 215 days equals nine hours. Assuming the rep works an average of 10 hours per day, nine hours of unproductive time amounts to nearly one full day vanishing from the annual sales calendar. Gone. Lost forever.

Now, instead of 215 days to sell, s/he is down to 214.

<sup>3</sup> CubeTree Deal Rooms datasheet

*Think through the seemingly limitless, minute activities and you'll see how easily they result in a monumental amount of lost time.*



What if, instead, there was a central online message board with instant messaging updates? What if you could quickly see what flight your colleague is taking so you can take the same one? What if you were updated whenever an account plan was modified?

Think through the seemingly limitless, minute activities and you'll see how easily they result in a monumental amount of lost time – the antithesis of productivity gains.

Business collaboration software products - such as CubeTree, Jive, Basecamp, CentralDesktop and Wizehive – help prevent the loss of productivity associated with these tasks. And you could argue that they lead to better quality of work, improved knowledge, more timely proposals and, ultimately, better impressions on your prospects. It's easy to see how this can have a positive impact on sales.

The following table lists the types of features associated with collaboration software along with a description of each. Not every product offers every feature but this will give you a feel for what to look for.

### Collaboration Software Features

Feature	Description/Uses
Microblogging	Twitter-like functionality. Let colleagues know what you're working on using short bursts of information. Send quick updates or announcements. Much easier and faster way to read, search for and post messages than with e-mail.
Blog	Write articles and notes that provide more detail about your thoughts and opinions. As an example, a Sales Manager might want to create a blog to share philosophies, sales strategies or motivational messages.  Or a product manager may want to share sales success stories to motivate and educate other reps so they might experience the same success.
Wiki	Wikipedia-like functionality. Wiki's are web pages that are easy to create, edit, and add information. Use Wikis to share knowledge of best-practices, competitors and products.
File sharing	Rather than placing a file in directories and folders on a shared network, files can be uploaded into the collaboration tool. Files get attached and associated with the sales opportunity or prospect they relate to.
Task assignment	Ability to delegate tasks, and track who where, and what is being done. If you have major account teams, this can be a great way to keep everyone on-track and on the same page.
Annotate and discuss documents	Collaborate on proposals and RFP's with all the stake-holders.
Groups	Set up groups to restrict content to members. You could have a group for your re-sellers or partners. Or perhaps a separate group for outside sales reps and inside reps for information that pertains to one and not the other.

### Collaboration Software Features

Feature	Description/Uses
Link sharing	Often important information and ideas are found on an external website. Link sharing lets you store links in an easy to use directory for use by others and for future reference.
Photo sharing	Yes, photos of your recent team meeting or company event are great to have, but there are other uses of photo sharing to consider. When conducting meetings with remote salespeople or teams, you can take a photo of the whiteboard for others to access. Spot a store display of a competitor's product? Snap a picture with your smart phone and upload it to the system.
Polls	Use these to query your reps about many topics. Is the new presentation working? What do prospects object to most frequently? Which features do your prospects ask for most?
Trip Itinerary Sharing	Easily coordinate logistics, keep people informed of where you'll be when and see when others are visiting your facility next.

You might think of collaboration software as a private social network for your business. Some collaboration software is referred to as sales enablement because they offer such additional features as collateral management, trigger event notification and prospect research capabilities. Sales enablement is outlined in the next chapter.

Collaboration software prices range from "free" up to \$10/month/user and some require a minimum of 100 users.

*It pays to open up your collaboration system to other internal departments such as product management, marketing and accounting.* ””

It pays to open up your collaboration system to other internal departments such as product management, marketing and accounting. These people contribute in one way or another to winning the business. You might also want to open up your collaboration system to other parties. It's possible to set up a secure and private collaboration area to interact with customers, business partners and re-sellers. Not all collaboration systems allow you to do that; CubeTree for one is strictly for private company communications (all users must have the same e-mail domain name).

For those systems that do, you'll find many great reasons to invite your customers, partners and re-sellers to participate.

### Internal Sales Collaboration

Salesforce.com has announced a collaboration feature called Chatter which will be built into its CRM software in early 2010. Although collaboration features certainly don't have to be embedded in your CRM system, if they are, data from your contact records and other elements of the system will be integrated into your collaboration system. Records and information are tied together and you can work with both feature-sets as if they were one system.

Only a handful of CRM companies currently offer built-in collaboration tools. While this number surely will grow, it's not essential to have the two interwoven. If you're just starting out with CRM or you already have a CRM system in place, there is no reason why you can't operate efficiently by adding stand-alone collaboration software. It may be less disruptive than switching CRM programs to one that does have collaboration.

*Customers and partners both benefit when communication is more comprehensive, better organized and more easily shared.*

Plus, at this point, you're likely to get more capabilities in a stand-alone product than you would with one that is built into your CRM system.

### **Customer, Business, and Channel Partner Collaboration**

If your after-sale support requires task or project management, you may benefit from a collaboration system that is open to your customers. You can post and share files, send alerts and share calendars. No more e-mails with large file attachments. No more flooding your customer's e-mail system with short bursts of information which would be better served using microblogging. And no more documents scattered about on your hard drive.

iCentera, is a sales enablement product that offers collaboration between your sales reps, customers and partners. It's iCentera's position that collaboration enables better relationships, more informed and better armed re-sellers and the ability to transact more complex deals. We agree.

Customers and partners both benefit when communication is more comprehensive, better organized and more easily shared.

If you have strategic partnerships and need to stay in touch frequently, e-mail is not an effective solution. When updates are fragmented in e-mail messages and files are sent as attachments, it's difficult to keep the big picture in mind. E-mails and files are hard to find. This is helped by posting messages in a central location where they can be searched and stored by topic or project. Collaboration software allows you to associate files with topics which reduces the time searching your network files and folders.

## Collaboration

*Using collaboration software is an excellent tool for protecting the 215 and increasing sales productivity.* ””

Post and promote your channel partner programs. Share and track leads. Provide a centralized repository of customized marketing materials. Use message boards or wikis to share knowledge, to discuss business opportunities and to keep up-to-date on activities and events.

Using collaboration software is an excellent tool for protecting the 215 and increasing sales productivity.

## Chapter 4

*Analyze what characteristics your buyers have in common and use this information to create your list.*

### Sales Leads Tools

Sales leads are the lifeblood of sales. But what qualifies a contact as a lead? If you're buying a list of names or prioritizing a list you already have, you'll want to check them against a minimum set of criteria. Analyze what characteristics your buyers have in common and use this information to create your list.

#### The WHO: Contacts that meet your criteria

Perhaps your customers share company traits such as a certain business size or type of industry. Or perhaps the traits they share have to do with people, such as a certain job title. Traits could even be related to situations like expanding into other countries or obtaining a new round of funding.

Most likely, you'll discover that your buyers share a combination of traits. Once you have a clear understanding of the type of prospect that converts most often to a buyer, it's possible to use sales leads companies to find lists of contacts and companies to call on.

Several sales leads companies provide databases from which you can search for contacts based on your criteria.

These companies compile their databases using different approaches. Some like Netprospex, Jigsaw, and GetBizLeads offer databases built with user-contributed data. ZoomInfo uses sophisticated technology to search the Web for contacts and still others like ReadyContacts conduct primary research (dialing companies directly).

*The more leads you contribute, the more new leads you get back.*

### Netprospex

Netprospex members contribute contact data from their own lists. In return, they are entitled to receive an equal number of contacts.

The more leads you contribute, the more new leads you get back. You can bank your credits and use them as you need. If you run out of credits, you can purchase contacts for 50 cents each. The pricing is easy to understand – and that’s one of the reasons I like NetProspex.

## FIND NEW PROSPECTS.

But don't settle for inaccurate contact info.



Find millions of B2B contacts with verified email and phone information.

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New to NetProspex? Mention Smart Selling Tools for 100 free contacts.



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*Jigsaw, a great source of free company profile information, uses a points system for buying contact information.* ””

Each lead comes with name, job title, company, address, phone number and e-mail. You can organize your contacts within their system and you can easily export them to your CRM tool or address book.

No need to worry whether the information is correct. For one, the search results screen shows when the lead was validated and the probability of accuracy. But there's an even better reason why you don't have to worry: They guarantee the accuracy. Here's how it works: If you discover that any contact's details are incorrect you can turn it back in for a new contact.

You shouldn't have to do that very often as all data undergoes what they call "enterprise quality validation" and is verified and double-checked before it enters their database.

I've found Netprospex's service to be extremely reliable and easy to use.

### **Jigsaw**

Jigsaw, a great source of free company profile information, uses a points system for buying contact information. When you contribute a contact's full details, you earn 5 points – enough to buy one contact. You can also earn 5 points each if you do one of the following;

- Add a company
- Clarify a vague title
- Add a direct phone number
- Update contact information
- Update company information

*Any and all company data can be accessed at no cost although you do have to register.*

If you don't wish to contribute contacts, you can purchase points instead for \$1 each. Contacts cost 5 points, so purchasing a contact will cost you \$5. You can lower your overall price if you subscribe to the premium package, a monthly subscription that costs \$25/month. With your subscription, you get 25 points each month (enough for 5 leads) and each contact after that is only \$1 as long as you continue to subscribe.

Any and all company data can be accessed at no cost although you do have to register. You can search for companies by country, state, metro area, zip code, area code, industry, number of employees, revenue and ownership (private, public). This data may be viewed online or downloaded.

Once you get your company list, you may click on it to discover their subsidiaries, a description of their business, and what contacts are available to purchase via Jigsaw. You can even click on the news button to learn of recent news and press releases.

### **GetBizLeads**

GetBizLeads by MyWay Interactive is strictly a lead exchange network that is completely free and has a novel approach. You upload your contacts into the system just like Jigsaw and Netprospex. From there, others are able to view title, company and location information to decide whether it's a contact they want. If they do, they send a request to you, although your identity is never disclosed. Only your title, state and country are visible. You can approve the request and if desired get a contact from their database in exchange.

*This means you're one click away from viewing company news and the contact's recent Tweets.*

Of course you don't want to be giving leads to your competitors. To prevent that, you can set your trade preferences to "never trade to these companies" or "only trade to these companies"

Another novel feature: The integration of news and Twitter. Each contact profile contains a button for news and Twitter. This means you're one click away from viewing company news and the contact's recent Tweets. It's a handy way to gain insight.

I particularly like this system if you're in an industry that's complementary to and non-competitive with other businesses with whom you sell to the same types of people and companies. Someone who sells business insurance to CFOs could be a great contact trading partner for someone who sells employee compensation management to CFOs. In this example, it could make a lot of sense to share leads and information with each other. Again, there is no need to disclose your identities unless you choose to.

### **ZoomInfo**

Ever search the Web looking for just the right contact at a certain company? Sometimes you get lucky and find the information quickly. Sometimes it could take you an hour or more, and other times you may come up empty. How much time do you give it before you abandon the search altogether? Sure, searching the Web on your own is not a bad use of time if you find the information right away. If you don't, it's one of the biggest 215 killers there is.

ZoomInfo knows that the Web is a vast and rich source of information about contacts and companies.

*How much would you be willing to spend so your sales reps could easily find and connect with the right people at the right companies and close deals faster?*

It found a way to mine for that information using advanced technologies. ZoomInfo's semantic search technology gathers publicly available information from the business Web – millions of company websites, news feeds and other online sources – 24 hours a day, 7 days a week, then automatically compiles it into easy-to-search and easy-to-read profiles. According to company representatives, they add 20,000 new profiles every month.

ZoomInfo says it has the world's most comprehensive source of business information with in-depth profiles on more than 45 million people at 5 million companies. With ZoomInfo you get:

- Advanced searching: Filter people and companies by geography, title, industry, company size and keyword.
- Fresh contact info: Get contact details – phone, e-mail and mailing address.
- Deep profiles: Gain in-depth insight on your prospects – their career history and educational background.

How much would you be willing to spend so your sales reps could easily find and connect with the right people at the right companies and close deals faster? ZoomInfo sells subscription packages starting at 60 cents per contact and also offers unlimited annual licenses.

Every time I get the chance, I advocate that executives invest in these tools for their reps. Hands down, it's one of the best ways to protect your sales reps' valuable selling time. In fact, I recommend making all of these available to your reps so they are sure to find just the right contact at the right time.

*It identifies targeted accounts based on specific criteria and then finds role-based decision makers and influencers at those accounts.*

### ReadyContacts

If your company sells to people that aren't easy to find or that fit a very narrow or specific niche, you should consider hiring a firm to conduct primary research for you.

ReadyContacts is a service that builds customized lead databases. It identifies targeted accounts based on specific criteria and then finds role-based decision makers and influencers at those accounts. Since the lists are based on your criteria, you can feel confident that you're reaching the right people. If your team uses Salesforce.com, you can easily request a contact or a profile with one click, through their Readycontacts for Salesforce add-in.

ReadyContacts' pricing model is easy to understand. You pay per contact and/or per profile only. All deliverables come with 100% data accuracy guarantee so you know you're getting what you're paying for.

The prices start at \$10 per contact and \$30 per profile.

### The When: Timing is everything

It's one thing to get more leads that fit your criteria of an ideal buyer (the who). It's another to know when that prospect is most ready to engage (the when).

*One of the most exciting developments in sales tools is the ability to discover who is visiting your site and when.*

### Website visitor and lead-tracking services

One of the most exciting developments in sales tools is the ability to discover who is visiting your site and when. With traditional Web tracking software such as Google Analytics, website visitors are anonymous. You can learn how many visitors you had and what percentage are new vs. returning visitors. But visitors remain anonymous.

Enter software services that identify the company names of your visitors as well as their viewing habits.

These services from Active Conversion, Genius.com, LeadGenesys, DemandBase and others act as a caller-ID for your website visitors.

Studies show that only 1-3% of website visitors disclose their identity by registering. This means a whopping 97-99% of your traffic comes and goes without any ability for your sales team to engage them.

Website visitor tracking vendors provide you with a small piece of html code that you then insert into your website pages. That code allows them to grab crucial visitor information.

Each vendor uses their own proprietary algorithms to determine what company the visitor is from and which pages they visit.

Learning that someone from a prospect's company downloaded a report or visited the site for a fifth time is a good indicator that it's time to engage. Website visitor tracking software can tell you this.

*When a recipient opens the e-mail and visits the website, the statistics are recorded under that prospect's name.*

Some can even capture the clickstream so you know the order your pages were viewed by each visitor and how much time they spent on each page.

### Active Conversion

Active Conversion's service includes the ability to create Web sign-up forms that you post on your website. Once a person completes the form, it's possible to track their individual visit activity. Now the sales rep knows not only what company visited but who the person is from that company. And this data can be integrated into your CRM system so you have the latest information on your prospect.

Active Conversion also includes lead scoring and lead routing. Lead scoring is a way to automatically assign a score that indicates how qualified a lead is. You set up the parameters according to what makes sense for your business. Parameters may include number of pages visited, pages viewed, whether the link was tracked from e-mail, and more. On the other hand, lead routing defines how you want leads to be disseminated to your sales reps. You may designate that leads be automatically routed based on geography, lead score and other terms included in your Web forms.

Sales professionals can send trackable e-mails as well. When a recipient opens the e-mail and visits the website, the statistics are recorded under that prospect's name. Automatic notification is also possible which lets the sales rep know about the visit and, if desired, click through to view an instant replay of the visit. Using this information, the sales rep can assess prospect interest and prepare the best follow-up.

Marketing can also set up conversion events, which will result in Sales notification and suspension of workflow activities.

Marketing can also set up conversion events, which will result in Sales notification and suspension of workflow activities. For example, if a prospect visits the "how to buy" page on the website, a conversion event may be set up to alert Sales to that prospect's interests, present the visit replay to the appropriate sales rep and cause suspension of further workflow e-mails to that prospect (to prevent any duplication of effort between Sales and Marketing). Prices start at \$299/mo.





If you want to learn more about Active Conversion – click on a link below.

**77% of leads are DROPPED after 90 days.**



Not because they choose not to purchase, but because sales loses interest if the prospects isn't sales-ready! And 98% of the prospects to your website aren't identified, because they don't register.

**ActiveConversion will help you:**

-  Know when leads are ready to engage
-  Identify the leads that are interested but are still 'researching'
-  Auto-nurture leads until they qualify themselves to you
-  And More



Learn More at [www.activeconversion.com/smart](http://www.activeconversion.com/smart) 

*Website visit  
replays help sales  
see exactly what  
the prospect is  
interested in.* ””

## Genius Pro

Genius lets marketers easily create, schedule and send personalized e-mails either on behalf of the appropriate sales team member or from the appropriate marketing or executive alias. It's simple to personalize e-mail content by inserting the prospects name and by using the sales reps name as the "sender" of the e-mail even though it was sent from marketing.

Genius also provides full support for individual communications sent by Sales Reps and others on the team, both through easy-to-use e-mail templates and through the Genius Plug-In for Microsoft® Outlook®.

Genius lets anyone on the team send fully trackable e-mails from Outlook without requiring any website tagging or server changes.

Beyond the inbox, Genius delivers much more insight for your e-mail marketing programs by deep-tracking – without any website instrumentation or IT intervention – the entire visit. Website visit replays help sales see exactly what the prospect is interested in. By combining e-mail marketing with website analytics, Genius turns e-mail into an instant response system for prospect qualification. This lets you:

- Know instantly who's most interested in what you're selling
- Better understand specific prospect/customer needs
- Increase e-mail campaign conversion rates
- Improve close rates
- Reduce sales cycle time
- Optimize sales productivity

## Sales Leads Tools

With Genius Pro, marketers can initiate powerful e-mail marketing campaigns that deliver instant e-mail open and website visit results directly to Sales, so Sales can quickly prioritize lead follow-up, calling on the most interested prospects first. Genius does not make their pricing available publically.

## Chapter 5

*To start, determine what the non-customer-facing tasks are in the sales rep's day and in the sales process.*

### Sales Enablement

For quite some time, sales software vendors were known simply as CRM (Customer Relationship Management) companies. But CRM has its shortcomings – namely, the lopsided focus on collecting data FROM salespeople vs. providing value TO them.

Enter sales enablement software. It fills the gap, giving sales reps quick access to knowledge bases, content and strategies.

To protect your sales reps' 215, you need to enable them to accomplish their daily tasks easier and faster than how they do them now. Sales enablement software is designed to do just that, although because sales tasks are so varied you'll find the software just as varied. Using sales enablement software is one of the most effective ways to protect the 215.

To start, it's best to determine what the non-customer-facing tasks are in the sales rep's day and in the sales process. Then map those tasks to the capabilities of each software option. Note that I'm not saying that you shouldn't do these tasks – if in fact they are essential to the sales process – but that you should determine where the time sinks are and find ways to automate or reduce the time they take. If sales productivity is hampered by the manual approach to accomplishing these tasks, it should be easy to calculate an ROI for investing in sales enablement software. Let's explore that further.

### Prospect research

If you're selling a high-end product, chances are you need to take a consultative sales approach and to have a deep knowledge of each prospect.

*For a sales professional, the Web offers an exploding wealth of insight into your leads and prospects.*

Building credibility and trust is crucial for big-ticket items. As InsideView states in its brochure, "It's not just who you know that will make business deals happen, but what you know about who you know tightly synched with when and where you should know it."

The best way to learn about a prospect is to conduct good old-fashioned research. It's easy to search the Web for news items using Google. It's also easy to search Twitter, Facebook and LinkedIn. But there are two glaring problems with this approach: 1) it takes a huge amount of your 215 to conduct this type of research and 2) once you have the information, how do you synthesize, store and manage it?

For a sales professional, the Web offers an exploding wealth of insight into your leads and prospects. But tapping into that knowledge can be a huge time-sucker. And as the amount of information grows, your ability to keep up with both your research and your sales activities takes a huge hit.

Ideally this research could somehow be done with automated agents or computer scripts that know what to look for and then extract that data from the Web. If that were possible, you'd have a great deal of knowledge delivered to you in a timely fashion. It would be even greater if that information was automatically entered into your CRM system – under the appropriate company or contact name.

*OneSource offers an online database which provides detailed data on companies, industries, company executives and news.*



### InsideView

InsideView seeks to do just that with its SalesView product. SalesView keeps tabs on your prospects and customers for you. The system continuously monitors traditional business data sources (such as Capital IQ, Hoover's, Jigsaw, and Thomson Reuters), as well as emerging social media and the greater Web (blogs, Facebook, LinkedIn, Twitter and over 20,000 online news sites.)

It aggregates all of this information and then spotlights the information needed to engage with your prospects at the right time with the right knowledge and the right sales message. The standard version of SalesView is available for free. Pro and Team versions start at \$99/mo/user.

### OneSource

Taking a somewhat different approach is OneSource Business Browser and OneSource for Salesforce. OneSource offers an online database which provides detailed data on companies, industries, company executives and news. If you're a Salesforce.com user, this information can be automatically inserted into your contact and company records so sales reps have current and accurate data.

They reportedly use over 2500 sources of information to keep their database up-to-date. Users of this subscription service are able to access all of those sources by way of a single, consolidated interface. OneSource does not disclose their pricing publicly so you'll need to contact them directly.

*“There is a silver bullet in sales, it’s called timing — being first with buyers who recently entered the Window of Dissatisfaction.™”*

## Triggering Events

If you sell to prospects who develop a need for your products whenever a certain event happens, your sales are dependent on triggering events. A homeowner listing a house for sale likely will soon need a mortgage broker and a moving company. Listing a house for sale is an event that triggers the need for a service. A corporation announcing it is expanding its workforce or opening an office in a new location may just tip you off to a newly created need for office furniture, or computers or telephone services.

Founder Craig Elias of SHiFT Selling, a consulting firm specializing in trigger event selling, says, “There is a [silver bullet in sales](#), it’s called timing — being first with buyers who recently entered the Window of Dissatisfaction.™” Furthermore, “You can create timing by identifying, finding and capitalizing on the *Trigger Events* that shift buyers into the Window of Dissatisfaction. By being first with these highly motivated buyers you will sell more, sell sooner and sell at a higher price.”

One way to be alerted to trigger events is to use Google Alerts. A Google Alert (which is free) notifies you when a prospect or competitor is mentioned on the Web – based on what you tell it to look for.

OneSource Business Browser also has an alert function for notification of important news.

<sup>1</sup> A Window of Dissatisfaction™ occurs after a buyer realizes that a current solution no longer meets his or her needs but before they start the process of searching for alternative solutions.

Cold calling is no longer feasible for many selling situations. But warm calling is.”

Automating the notification of trigger events reserves the sales rep's 215 for spending time with prospects and it helps them be more effective while there.

### Referrals and networking

It's possible to learn if you have contacts with connections to your prospects. You could use LinkedIn<sup>2</sup> to search for your prospects' names and who you know that knows them. Cold calling is no longer feasible for many selling situations. But warm calling is.

Warm calling is often thought of as a phone call where you're able to refer to a common acquaintance or some other relevant connection, making your call more welcome than it would otherwise be. It would be more accurate to refer to this type of call as *tepid calling*.

Finding common connections and conducting tepid calls requires a great deal of time, easily adding up 10 hours each week. That's one full day of lost productivity EVERY week.

There are ways to turn a tepid call into a warm call, the best of which is when your reference sends a personal note of introduction. Direct referrals are the warmest calls of all to make. It's possible to build a business based on referrals if you make it part of your routine to ask for them.

<sup>2</sup> LinkedIn is an interconnected network of professionals from around the world. You can find people, be introduced to them and discover how closely they are connected to you.

*Printed brochures  
are costly to  
design, print  
and ship.*



In her book [“No More Cold Calling”](#) by Warner Business Books, Joanne Black offers a system for building your network of referrals so you can spend more time selling and less time looking for people to sell to. She points out four potential benefits of referral selling:

1. Increase the quality of your prospects
2. Increase revenue and profits
3. Get clients faster
4. Eliminate unproductive selling.

### **Sales Collateral (easy to find, available when you need it)**

Of the many tasks sales reps have to deal with, one of the most aggravating is to search for, find and customize the right marketing materials. When brochures are printed as hard copies, it goes without saying that a sales rep has to know where they're physically kept. This can mean they have to order, store and manage their own inventory or they must rely on others to do it for them. Printed brochures are costly to design, print and ship.

With the price drop of high-quality color printers, it's now just as affordable to print them on-demand. When sales reps print their own marketing materials, they have the added benefit of personalizing or customizing the information to suit their sales situation.

Marketing is also able to update the collateral as often as needed with limited additional costs. However, it becomes burdensome to track different versions.

*Before you know it, multiple versions of the same piece of collateral are circulating.* ”

Say marketing has posted one version on the network while a sales rep is still using the old version. Before you know it, multiple versions of the same piece of collateral are circulating.

That's why you're starting to see CRM software with collateral management – sometimes called “Asset Management” – built in. Marketers need only to post the new version into (and remove the old from) the central repository that feeds the sales software. Sales reps love it because it's a huge time-saver. And that's why we love it, too.

### **FastPath**

If your CRM software doesn't have collateral management or you don't have a CRM system, there are other options. One in particular is FastPath by Sant Corporation.

Content is uploaded into the FastPath system where users have access from anywhere via their Web browser. You use familiar "Google-like" searches to locate the relevant content. That content can be immediately downloaded, emailed or added to a FastPath Project.

Content items in a FastPath project can be personalized, merged and converted to a PDF file, which users can deliver to recipients by e-mail.

It's a great way to protect the 215. It gives both your direct and indirect sales teams a way to locate, personalize and deliver relevant sales materials quickly and easily to prospects.

*A good collateral management system provides information and knowledge at the point in the sales cycle when it's needed.*

FastPath can be used for sharing expertise as well. The latest product “cheat sheets” and FAQs (frequently asked questions) can be published and stored in the system. In addition, you can find people who have the expertise by a simple search feature – the same way you search for content. The cost is \$20/user/month.

### **iCentera**

iCentera also offers collateral management. It uses the tagline “Portals for Mortals” which explains the focus – keeping the system easy so sales reps will use and benefit from it.

A good collateral management system provides information and knowledge at the point in the sales cycle when it's needed. Reps have access to only the most current marketing materials because they're stored digitally in a centralized location on the portal. This, of course, gives marketing more control over the messaging as well.

iCentera's software allows marketing to track usage, which helps determine which items are most useful. Marketing materials can be updated across the organization in minutes.

Again, the reason to centralize your marketing materials online and to consider products like FastPath and I Centera is to protect your sales reps' limited selling time – “the 215.” The rule of thumb is a task that eats up 2.5 minutes of each day translates to one full day of lost selling time per year. iCentera does not publically disclose their prices.

*Kadient's system also guides your salespeople through the process of creating deliverables tailored to each prospect's needs.*

## Kadient

Kadient also offers a system for collateral management called "Dynamic Sales Content." The system provides a central library for all content and the ability to search, browse and find. Kadient's system also guides your salespeople through the process of creating deliverables tailored to each prospect's needs. Sales reps not only save time, but they can respond to prospects quicker; they use the most current marketing materials; and they're quickly off to work on the next potential sale.

However, Kadient's system<sup>3</sup> is designed for more than collateral management.

## Sales Playbooks

For the longest time, great salespeople were seen to have been born with the ability to influence others – the "art" of sales. Now we realize that great salespeople are great because they have a mental playbook from which they select the best plays for each situation.

Kadient's Sales Playbooks are meant to help transfer that knowledge and success rate to others and institutionalize successful practices across the organization.

A Sales Playbook aligns sales activities, content and coaching with the customer's buying cycle and it's served up within a CRM system so the salesperson knows what to do, how to do it and when to do it.

<sup>3</sup> Requires Salesforce.com or Oracle CRM

*Sales Playbooks can be developed for any recurring selling situation where you want to drive repeatable behavior.*

Sales Playbooks can be developed for any recurring selling situation where you want to drive repeatable behavior.

They consist of a series of plays that are based on what proved to work in previous sales engagements.

These questions can help you decide whether sales playbooks would benefit your sales team<sup>4</sup> :

- Can your salespeople get the information they need in the right place, at the right time?
- Can your knowledge be tailored to specific sales situations?
- Are you drawing insights from real-life sales processes?
- Can you take advantage of what's learned in the field?
- Do you have a process for collaboration and continuous improvement?

Kadient does not publically disclose it's pricing.

<sup>4</sup> See the full list of questions at Kadient's Website

## Chapter 6

*Chances are you won't find an hour in one place. It will more likely be 5 minutes here, 2 minutes there.*

### Productivity and Time-Saving Tools

In order to be more productive, you need to spend your time more efficiently. In general, if you want to eliminate an hour's worth of non-selling tasks each day, you have to eliminate an hour's worth of those activities.

Chances are you won't find an hour in one place. It will more likely be 5 minutes here, 2 minutes there. To discover where those minutes are, start by keeping track of how you spend your time each day by keeping a log and writing everything down. Then review the list to see where the time savings can be found.

I've pointed out that 2 ½ minutes a day adds up to one full day of lost productivity a year. If you can eliminate five or six tasks that each requires 2 ½ minutes a day, you've just saved yourself 5-6 days which you can now spend with customers.

### Outlook Plug-Ins

Most of us spend a lot of time using Microsoft Outlook. In fact it just might be running nonstop on your computer as a central dashboard for tasks, meetings and e-mails. Outlook is very useful if not essential. But there are drawbacks to the program. If you've ever tried to quickly locate an attachment, you know what I'm talking about.

There are several Outlook "plug-ins" that give the program additional functionality and convenience. These plug-ins add buttons and menus to the screen that can be used alongside of Outlook's standard features.

## Productivity and Time-Saving Tools

*Xobni adds an indexing feature that makes searching for contacts, messages, attachments and threaded conversations easy to find.* ””

**Xobni**

Xobni (spelled “inbox” backwards) is one of my favorites. Xobni adds an indexing feature that makes searching for contacts, messages, attachments and threaded conversations easy to find. And it’s lightning fast. Once you download Xobni, it appears as a sidebar in your Outlook screen. The sidebar includes a search box for finding information stored in Outlook.

Let’s say you’re on the phone with Anne Smith who asks to discuss the document she e-mailed last week. No need to panic. As you start typing her name, Xobni begins building the list of matching attachments. Before you finish typing A-n-n-e it’s already calling up a list. Within seconds, you’ll see a list of her e-mails, conversations, attachments and appointments.

If Anne is in LinkedIn, you automatically see her LinkedIn photo, her phone number, title and company name. And if you use Skype, you can simply click on her phone number to call her.

Along with the LinkedIn functionality, you’ll see a button for Facebook, Twitter and Hoovers. Clicking the Hoovers button will pull up a company profile if available. Using the Twitter button allows you to send a quick tweet. And clicking the Facebook button sends you to their Facebook profile. If you’re a Salesforce.com user, you will also see a button to access Salesforce.com specific data inside Outlook.

Xobni Pro costs just \$29.95/license with no monthly fee. It has a free version as well if you want to give it a try before buying.

*Template Phrases for Outlook keeps frequently used phrases and Microsoft Outlook templates at hand so that you can easily grab and paste the right one into an e-mail message.*

### Template Phrases for Outlook

Another Outlook Plugin is from Able Bits and it's called Template Phrases for Outlook. When you download this plug-in, you get another menu added to Outlook. If you write a lot of e-mail messages on a daily basis, you know that some part or parts of the e-mail text is constantly repeated. Template Phrases for Outlook keeps frequently used phrases and Microsoft Outlook templates at hand so that you can easily grab and paste the right one into an e-mail message. Phrases and templates are easy to organize and access.

You need just a double mouse click to insert frequently typed phrases or blocks of text into Outlook e-mail messages or to add a new phrase to your template list.

Perhaps you'll have a Thank You folder. This might contain the following templates; thank you for your time and patience; thank you for contacting us; thank you for attending our event; thank you for choosing us.

Template Phrases for Outlook is a great time-savings tool and the cost is only \$29.95 per license. Again, no monthly fee!

### Attachments Alarm for Outlook

Able Bits has another Outlook plug-in that I find to be a time-saver. It's called Attachments Alarm for Outlook. It's a clever tool that solves a frequent e-mail nuisance. If you've ever pressed send to an e-mail that is supposed to have an attachment only to realize too late that you forgot to attach the file, you've experienced this nuisance.

## Productivity and Time-Saving Tools

*It will never let you forget to add an attachment if the body of a message contains the keywords you specify.*

This software looks for certain words in your e-mail such as “attached,” “in the attachment” and “attached file.” It will never let you forget to add an attachment if the body of a message contains the keywords you specify. Instead, a message pops-up asking if you intended to attach a file. Does it save a ton of time? No. But what if you sent an e-mail with an important and timely proposal attached, then shut down your computer to catch a flight? Only you didn’t realize that you forgot the attachment? That can have huge consequences. Attachments Alarm for Outlook would’ve saved the day. The cost is only \$19.95 per license.

### Calendar & Scheduling Tools

If you’re in sales, you need to schedule appointments. In all likelihood, the more appointments you have, the more sales you close and the more money you make. Unfortunately, scheduling time takes time!

In fact, it often takes a LOT of time. When you schedule appointments with prospects, what does the process look like? For most people, it looks like this: You open your calendar, look for available time, hand-type several options of days and times into an e-mail and then send the e-mail on to your prospect.

Then you wait to hear back as to which option is acceptable. If no option works with your prospect’s calendar, you are offered several alternate options in the e-mail reply to you. This could take a few rounds of back and forth to find a mutually convenient time.

## Productivity and Time-Saving Tools

*Meanwhile, your prospect is busy and so this becomes a chore – or worse, enough time passes that his or her interest starts to wane.*

Meanwhile, your prospect is busy and so this becomes a chore – or worse, enough time passes that his or her interest starts to wane. It's imperative that a sales rep talks with the prospect as close to the moment the prospect declares an interest as humanly possible in order to avoid these two consequences.

The ability to quickly schedule an appointment accomplishes two things; 1) you're more likely to advance the sale because of the timeliness of your follow-up and 2) you have more time which means you can schedule more calls. More calls – that are timelier- equal more sales.

### TimeDriver

For an individual sales performer, nothing would be better than to have the scheduling magically take care of itself. Appointments would flow into your calendar with little or no action on your part. In my experience, that's what happens with TimeDriver

TimeDriver is for sales professionals, entrepreneurs, executives, consultants, service providers and anyone who wants to invite others to schedule a sales demo, account review, phone consultation or other sales interaction.

It's a Web-based software program that works as an online personal appointment scheduler. I find it extremely easy to use and addicting.

It's simple to e-mail appointment invitations and see appointments flow back into your Google, Outlook or Salesforce calendar.

Productivity and Time-Saving Tools

With TimeDriver, you'll see meeting confirmations appear on your calendar with no further action required on your part. I love this software. In fact, we named TimeDriver our Smart Selling Tools HotPick for December. Best of all – TimeDriver costs just \$29.95/year.

Check them out now by clicking on a link below.

**GET 56% MORE CONFIRMED MEETINGS\***  
**More meetings. More sales. More revenue.**

With TimeDriver appointment scheduling software, your sales team can invite customers and prospects to schedule time for sales demos, account reviews, phone consultations and more.

Your team will get more appointments with fewer hassles than ever before. No more phone or e-mail tag. It's easy to get started, because TimeDriver is an on-demand solution that runs on the Web.

For more information, call 877.434.4837

\* Based on a controlled "A/B" test to see if an e-mail with a TimeDriver schedule button delivers more confirmed appointments than an e-mail that asks customers to propose a few times when they are available for a call.

**PCWorld**  
 "TimeDriver lets people add a Web-based self-service scheduling widget to Web pages and e-mails. Extremely slick."

From: Terry Nolan  
 To: George Halliday  
 Re: RFID Readiness

Thank you for requesting information. I would be happy to spend a few minutes with you on the phone to learn about your needs and explain our solution. Click the schedule button below to choose a convenient time for our call.

Regards,  
 Terry Nolan  
 Sales Exec

**Click To Schedule an introductory call**

For a 30-second test drive, go to: [www.timedriver.com](http://www.timedriver.com)

**time driver**  
 personal scheduler

## Productivity and Time-Saving Tools

*This can slow productivity to a halt while attendees respond to back and forth e-mails and check and re-check their calendars.*

However, there are times when scheduling involves a much more complex process. Perhaps you need to coordinate a meeting that needs to include you, your prospect, a sales engineer and a client support manager.

These types of appointments are extremely time-consuming to coordinate. Instead of offering discrete times - you need to search for common availability.

TimeTrade (makers of TimeDriver), ScheduleOnce and TimeBridge all offer solutions to solve multi-participant meetings.

### **ScheduleOnce**

ScheduleOnce offers a Web-based scheduling service that works with Google Calendars, Microsoft Exchange and Lotus Notes.

They focus on meetings that require 2-6 people; what they refer to as “mid-sized meetings”.

One of the big issues with mid-sized meetings is that during the time span between the proposed meeting time and when the time is scheduled there is no visibility into attendee availability, making it difficult to respond to schedule changes. This can slow productivity to a halt while attendees respond to back and forth e-mails and check and re-check their calendars.

Throw in the issue of time-zone differences and daylight savings day issues and you almost need a PhD in order to figure it out. Indeed, scheduling a meeting with multiple attendees in multiple time zones can sometimes take longer than the meeting itself. A definite 215 killer.

## Productivity and Time-Saving Tools

*TimeBridge syncs across time zones and most popular calendars, including Google, Outlook and Apple iCal.*

ScheduleOnce handles all the time-zone adjustments to properly identify mutually available times. It gathers availability from the calendars of attendees across organizations. Busy times from attendee calendars are kept updated to ensure accuracy at any point.

ScheduleOnce offers individuals and small businesses a free version specifically designed to work with Google Calendar.

Finding a common time for a meeting with ScheduleOnce looks like this:

1. The organizer sets tentative availability for the meeting
2. Invitees reply with their tentative availability
3. The organizer evaluates invitee replies and schedules the meeting

ScheduleOnce has a patent-pending method for ensuring absolute scheduling accuracy across any combination of time zones and daylight saving changes. You can rest assured that all attendees receive the correct time, anytime in the year and anywhere on the globe. ScheduleOnce does not publically disclose their pricing.

### TimeBridge

TimeBridge makes it easy to find a time to meet, set an agenda, coordinate logistics, conduct a phone or web conference, and document decisions and actions. TimeBridge syncs across time zones and most popular calendars, including Google, Outlook and Apple iCal. TimeBridge for iPhone is also available.

## Productivity and Time-Saving Tools

*If you're a small business, your online scheduler is configured to your specific type of business, whether you're an independent professional or a multiple location operation.*

One of the neat features of TimeBridge is the built-in collaboration recently added as a result of a partnership with Box.Net. Users can collaborate on relevant files and documents in their TimeBridge Meeting Room. Each individual attendee, present in-person or virtually, can access meeting details from the time the invitations are sent to the conclusion of the meeting. TimeBridge does not publically disclose their pricing.

**TimeTrade**

TimeTrade provides mechanisms to support integration with external systems, including Microsoft Outlook, websites, portals, CRM systems, call center system, and ERP systems. Integration mechanisms include Web Services, HTTP redirection with query parameters, and iCalendar data interchange technology. TimeTrade is especially well-suited for integration using a service-oriented architecture.

If you're a small business, your online scheduler is configured to your specific type of business, whether you're an independent professional or a multiple location operation. Because they host the application at their secure data center, there isn't any software to purchase, install, or maintain.

With TimeTrade online appointment scheduling for small businesses, you'll pay a fixed monthly fee which includes 24/7 access to the application for your staff and customers, live technical support, and hosting services. The fee is based on the number of resources and locations scheduled through their system so you'll need to talk with them directly to determine pricing. A resource is a person who performs a service, such as a massage therapist or instructor. A resource can also be a facility such as a tennis court or conference room.

## Chapter 7

*One of the biggest  
215 killers is  
un-connected  
calling.*

### Inside Sales Tools

If you have an inside sales organization that handles pre-sales activities, there are a lot of tools at your disposal. What do your inside sales reps spend time on?

One of the biggest 215 killers is un-connected calling. Reaching prospects on the phone requires that reps identify their call list, check their notes before dialing, dial, reach voicemail, then finally leave a message or hang up to try again later. After all of this, they'll want to record their effort so their completed-activities list is full at the end of the day.

You can see the waste in this scenario. It's possible; your sales reps could get lucky and reach each prospect on the first try.

Once a connection is made, time is spent talking to prospects. That's a good thing of course - if your sales reps are prepared with talking points, qualification questions, needs analysis questions and objection handling responses.

After a call comes the follow-up. What was promised to the prospect? What is the next action item? When is it to take place? What occurred during the call?

It's not good to connect with a prospect and then fail with the follow-up.

Fortunately, there are tools to help inside sales reps plan, prioritize, make, record and follow up on calls.

*It offers the capability for your own inside sales staff to speak with the exact people they need to reach.*

## Connect and Sell

ConnectAndSell says it is the world's first guaranteed live-conversation technology that delivers on-demand conversations or you don't pay. What does that mean?

It offers the capability for your own inside sales staff to speak with the exact people they need to reach. They guarantee five live connects per hour or you pay nothing. Their technology allows them to dial off your list and when they reach a person on that list they do a sub-second turnover of the call to your rep. The prospect never talks with ConnectAndSell's staff. Instead, the call goes directly to your sales rep without any noticeable click or indication that a call is being transferred.

ConnectAndSell delivers sales prospects to you live so that your sales reps can focus on selling – the very thing we mean when we talk about protecting the 215. In the end, it should accelerate the process of connecting to new or existing prospects that your team is working to close.

The system uses a combination of patented switching technology and virtual sales agents so that when they connect to a prospect, the prospect believes that your sales rep has made the call.

They charge \$275/hr and offer volume discounts. That may seem expensive, and for some it might not be worth such an investment. However, if your organization relies heavily on outbound calling, it could be the very thing that shoots productivity through the roof.

Only you will know which would be the case for you.

*The  
InsideSales.com  
Power Dialer is  
designed to load  
a list of leads or  
contacts to call  
one at a time.*

### InsideSales

InsideSales.com is lead management and phone dialer software. It is integrated with Salesforce.com CRM but it can run without it as well. It has its own on-demand lead management CRM with built-in PowerDialer. The InsideSales.com Power Dialer is designed to load a list of leads or contacts to call one at a time. The rep will hear the phone ring as the system calls each number. InsideSales.com claims its PowerDialer is far more powerful than Click-to-Dial or manually dialing because the entire call is optimized with 'power tools' that automate mundane tasks.

The company cites a study conducted by MIT on its behalf. The study found, "Combining a hosted CRM lead management system with outbound dialers and inbound call routing opens up all kinds of new ways to increase productivity at a price-point that removes all barriers for any size company."

In reality, I don't think they needed a study to know that automating both outbound and inbound calling and tying it to a CRM system would save a lot of time and lead to increased productivity.

### ShadeTree

ShadeTree offers a guided selling system which it refers to as "thoughtful conversations." For conversations with prospects to be effective, sales reps have to prepare for calls, engage effectively and record the results. ShadeTree aims to help with all three of these.

*The benchmark measurement of inside sales effectiveness has traditionally been the number-of-dials per rep.*

Prepare for a call: Define the purpose of the call, research the prospect and plan the content.

Engage effectively: In order to engage effectively sales reps need to know how to map their product benefits to the prospect's business and what to leave in a voicemail if they don't reach the prospect.

Record results: And finally, to record call results sale reps need an easy and quick system for keeping track of notes, outcomes and next steps.

The benchmark measurement of inside sales effectiveness has traditionally been the number-of-dials per rep. That of course, is the easiest metric to measure. But it's not the most important metric. It doesn't capture the amount of effort required to make a call nor does it measure the "effectiveness" of each call.

If the number-of-dials per rep doesn't give a true measure of success, what else is needed? According to ShadeTree it's:

- The actual number of conversations taking place
- The number of qualified leads produced
- Learning what makes a lead rate as a qualified lead (i.e. decision maker, budget, timeframe, key MBO)
- Knowing which campaigns yielded the highest numbers of qualified leads
- Discovering which personas/roles generate the most closed opportunities

They won't allow us to disclose their pricing so you'll need to engage with one of their sales reps to learn more.

*It's particularly useful to inside sales because it allows the rep to turn a sterile medium (e-mail) into a much more personal tool.*

### ConnectNote

I'm mentioning ConnectNote here because I think it's a useful application for inside sales. ConnectNote is basically video e-mail. Any sales rep with a webcam can quickly record a video message and send it off to a prospect. Along with the video message, the rep can display a document such as a proposal, or sales literature.

It's particularly useful to inside sales because it allows the rep to turn a sterile medium (e-mail) into a much more personal tool. Rarely are inside reps able to meet with prospects in person. When a prospect has never seen or met the sales rep, the rep is just a voice at the other end of a phone – hardly a personal connection. Once a prospect has “met” a sales rep, in this case to hear and see the rep via video, that rep becomes more humanized. It's easy to be dismissive on the phone with a somewhat anonymous sales rep. It's not so easy once the sales rep is seen as a real human being.

I envision inside sales reps sending a ConnectNote to thank prospects for their time on the phone and perhaps attach follow-up information. Or take it one step further and walk the prospect through the attached information using ConnectNotes' built-in pointer and highlighter. You can synch your video to the attached document. It's almost like being there in person.

ConnectNotes can be forwarded as well – just like any other e-mail. No longer must you depend on the prospect delivering your pitch to his or her boss as effectively as you would have. Their boss will see you stating your case via the ConnectNote.

You will know how many times your ConnectNote was viewed and forwarded by way of the online dash-board. ConnectNote records this information in the background. ConnectNote is an on-line subscription based service which costs \$25/mo/user. Recipients do not need to subscribe.

## Chapter 8

*If we can flip that ratio around and spend more time with prospects than we do following up, it will get us one big step closer to closing more sales.*

### Sales Follow-up Tools

If you're not in a sales meeting, chances are you're following up on one. It's a constant struggle to balance the time spent meeting with prospects with the time spent following up. You have to do an equal amount of both. But the amount of time spent following up with a prospect can be many more times that of time spent with a prospect. If we can flip that ratio around and spend more time with prospects than we do following up, it will get us one big step closer to closing more sales.

Follow-up takes a long time for many reasons. I've outlined three of them below: 1) document creation 2) document delivery 3) document approval.

#### 1. Document Creation

Several companies offer tools to help sales professionals generate quotes, create proposals, get signed contracts faster, manage outstanding quotes and close more deals.

Creating proposals and contracts can require enormous amounts of time, especially if they have any one of the following:

1. Items for sale that require complex configuration
2. Special terms and conditions, Non-disclosure agreements or other legal considerations.
3. Compliance with carefully crafted marketing messages and selling points

*Sales contracts may require input from your legal department, especially if the contracts include special terms or non-disclosure agreements.* ””

### Document Creation: Configuration Tools

Cameleon and BigMachines both offer solutions for companies with complex pricing and highly configurable products. Sales configuration tools enable users to quickly and accurately customize products and services based on the buyer's needs. Configuration tools are needed in order to:

- Constrain options based on product compatibility rules
- Make recommendations on product up-sells and cross-sells.
- Configure nested systems that contain multiple products and services
- Support complex sizing calculations and option algorithms
- Calculate special promotions and discounts.
- Generate complex proposals quickly

### Document Creation: Contracts – special terms

Sales contracts may require input from your legal department, especially if the contracts include special terms or non-disclosure agreements.

### Exari Sales Accelerator

Exari believes its Sales Accelerator product shortens sales cycles by empowering sales reps to create customized, pre-approved non-disclosure agreements without waiting for legal. That sounds a little scary – especially if you work in the legal department.

*Sales reps create their pre-approved, legally-compliant documents by answering questions in a browser-based interview.*

Here's how it works.

Sales reps create their pre-approved, legally-compliant documents by answering questions in a browser-based interview. The questions are created using templates designed and approved by your legal department.

Exari also offers document assembly and contract management solutions which include more sophisticated features. The Document Assembly solution makes it possible to create custom NDAs, service agreements and contracts.

According to Exari, it's done "using intelligent templates designed and approved by your company's legal team and sales management. All important data is captured (and available for re-use across CRM and ERP systems), and high-quality documents are produced with all clauses required to manage the particular risks of the deal."

Exari's Contract Management solution uses a self-service contracts wizard to create and then store company compliant contracts. You can get Exari Sales Accelerator with a standard NDA for free. That's enough for you to try it out and see how it works for you. Pricing for other editions is not publically available.

### **Document Creation: Marketing compliant proposals**

#### **ProposalSmartz**

ProposalSmartz is not a Web-based application; you run the software off your own computer network. After installation it appears as an add-on to the Microsoft Word toolbar.

*ProposalSmartz provides the means to add, store and organize your templates for easy access through Microsoft Word.*

Proposals generally contain many common elements: Cover letter, company background, executive summary, proposal objectives and timelines are a few examples. Think of each of these elements as templates. ProposalSmartz provides the means to add, store and organize your templates for easy access through Microsoft Word.

Because sales reps build proposals, contracts and other documents using a central repository of templates, marketing can be sure its carefully crafted messaging is used. And sales reps don't have to re-invent the wheel every time they draft proposals. Nor do they need to worry about leaving in the wrong company name as can happen when using previous proposals as templates. The cost is \$90 per user/computer.

### **ProposalMaster**

ProposalMaster on-demand is a Web-based proposal generation tool by The Sant Corporation. The two reasons to invest in a tool to help your sales reps write proposals are to:

1. Save precious selling time
2. Ensure accurate content that reflects your marketing message

Sant hits the nail on the head in saying, "By automating the majority of the proposal-writing process, ProposalMaster empowers you to spend less time writing and editing and more time doing what you do best — selling. Every document you create contains accurate, approved content so your marketing message always maintains a consistent look and feel".

*ProposalMaster leads the sales rep through a series of questions and common answers.*

This system works differently than ProposalSmartz. ProposalMaster leads the sales rep through a series of questions and common answers. Once the sales rep completes the wizard, a proposal is automatically composed and presented as a Microsoft Word document that can be modified as needed. You can use ProposalMaster to create other documents as well like sales letters, personalized collateral and contracts. ProposalMaster's database can store text, bullets, formatting, logos, pictures and other graphics that help make your proposals look professional.

ProposalMaster is offered separately or as part of ProposalMaster Suite. The Suite includes ProposalMaster, RFPMaster, ProSearch (to search for approved and relevant content), and PresentationBuilder. The Sant Corporation doesn't make their pricing available publically; In fact, Web visitors can't access a demo without completing a registration form. But a handy tool is provided to calculate your ROI based on a number of factors, including "time-saved."

## 2) Document Delivery

If you're sending a follow-up packet through the mail, you may have to print a cover letter, locate and insert the right brochure, and stuff, address and mail. What's that take – a good 15-20 minutes?

It's faster to follow-up by e-mail although attaching brochures or providing links to online brochures require a high degree of organization. And the sales rep must know the materials or links are the most current. That requires some sort of version control for centralized documents. In addition, attachments are often large files which recipients aren't always comfortable opening.

*With a client record in view, sales reps can order-up branded marketing materials to be personalized and mailed with just a few clicks.*

If follow-up documents require signature approvals, proof of receipt or other legal elements related to delivery, extra care has to be taken. And extra care translates into additional time. Costs are high when you send documents by courier. If you forget a document, then you have to incur a second charge for sending.

E-mail follow-up isn't always the most appropriate. Sometimes you want to deliver documents for prospects to hold in their hands. Sometimes you must send hard copies due to legal compliance issues. Given a choice, it's tempting to sacrifice real mail for e-mail because it's so much faster. Faster means you can get more done. What if you could send real mail as quickly and easily as e-mail?

### Cloud2Mail

That's what Advanced Image Direct (AID) asked itself before creating Cloud2Mail. Its core business is large volume direct-mailing in monthly volumes from 10,000 to 10 million pieces. These guys know printing and these guys know mailing.

AID recently announced Cloud2Mail which lets sales reps send follow-up materials through the mail with just a few clicks. Cloud2Mail leverages AID's core competency and patented process for creating, producing and shipping direct mail.

Here's how it works. Use Cloud2Mail's free Salesforce.com plugin, or link it to any other CRM program. With a client record in view, sales reps can order-up branded marketing materials to be personalized and mailed with just a few clicks.

*They can send high quality letters, greeting cards, brochures or proposals to anyone from anywhere.*

For sales reps on the road with no ability to send hard-copy marketing materials, this is a winner. They can send high quality letters, greeting cards, brochures or proposals to anyone from anywhere. They can configure an information packet with any combination of marketing materials and have it printed, stuffed into envelopes and mailed on their behalf for less money than doing it in-house.

The company says mailing usually occurs within a day from when it's requested.

This doesn't happen magically. Obviously there is a lot of up-front work that needs to be done – usually by marketing. They'll have to get the brochures and any other document types designed and set up for printing. If letters are to be included, they'll need to create the various templates and decide which portions can be customized by reps (if any).

But sales will love it because it speeds up the follow-up process. It also helps them know when to take the next step because each envelope comes with an Intelligent Mail Barcode which notifies them - through the CRM system - when the mail has been delivered. Letters and cards cost .50 to .99 each. Brochures and information packets will run you \$2 and up.

### **RPost**

RPost is "Registered E-mail"®. If you're in real estate, financial services, insurance, or healthcare you have a pretty good feel for the amount of time consumed with paperwork that contains legal elements. These documents need to be tracked carefully for signature verification, proof of delivery and compliance.

*The cost for managing this paperwork can be staggering. Yet printing and delivery service costs are accepted as unavoidable business expenses.*

The cost for managing this paperwork can be staggering. Yet printing and delivery service costs are accepted as unavoidable business expenses.

Why can't all of these documents be handled electronically via e-mail? They can be with RPost.

Using RPost eliminates paper altogether, minimizes back-and-forth time and assures time-sensitive correspondences are delivered to prospects. For certain businesses, this can have a profound effect on your sales reps' productivity.

RPost would be appropriate for:

- Approval of price quotes or product configurations by e-mail, with electronic signature and proof records for both parties.
- Delivery of proposals and responses to RFPs with proof of delivery under deadline.
- Obtaining customer signoff on changes to contracts, terms and conditions.
- Delivering commission reports and sales policies to your sales team.

RPost services can be configured in different ways. Its DealCloser platform includes Registered E-mail®, e-Sign-off, opened tracking for e-mail and e-mail encryption. Business packages start at \$79/mo.

*Sales reps have online access to the most recent sales collateral, presentations, case studies, training guides, logos or any file.*

## PrintSF

PrintSF offers collateral on-demand for e-mailing or sending through the post. Sales and marketing team members use the PrintSF utility through the Salesforce.com dashboard so you have to be a Salesforce.com user.

The utility provides three main capabilities:

1. Content management
2. Collateral delivery
3. 1-to-1 direct mail campaigns.

## Content management

I like that PrintSF delivers a feature-rich collateral management portal that streamlines how you publish, share, print and mail marketing collateral: All from one dashboard. Sales reps have online access to the most recent sales collateral, presentations, case studies, training guides, logos or any file.

Authorized administrators designate whether files are accessible by others outside the company, within the company or by specific users.

Any company can use PrintSF for free for up to 5GB of data storage. You can sign-up for a fee-based package if you require more storage. You have to contact PrintSF directly for pricing, which is not publicly available.

<sup>1</sup> Requires the use of Salesforce.com

*Companies can't afford to let the contract-signing process slow the flow of business.*

### 3) Document Approval

Of course you want to get deals signed as quickly as possible.

Companies can't afford to let the contract-signing process slow the flow of business. Offering customers a way to sign contracts electronically may even increase your close rate because less time passes between when they agree to buy and when they're asked to sign. Tools such as Echosign, RightSignature and e-Signature allow you to sign and get counter-signatures electronically.

#### Echosign

If your business uses electronic signatures on digital documents you'll need a way to store, search, and access the document in a central location. Echosign specifically provides this capability. It's pricing starts at \$99/mo/5-users.

#### RightSignature

Sales reps send estimates, contracts and proposals via RightSignature's on-line dashboard and customers simply sign online using their mouse.

Using their Web-based user interface, reps upload a document and enter recipient information in less than a minute. Recipients may sign online, on a faxable signature page or on an iPhone.

Digital signing makes it much easier for the client as well. Instead of signing a paper document and returning it right away by fax, scan or mail, recipients often will put it down on their desk to deal with later.

*From then on, any document that requires your signature or initials can be inserted with a few key-strokes.* ”

They know it will take time from their day, so, with good intentions, they simply put it in their “to-do” pile. You can avoid this happening to your contracts when signing is done in seconds with a few clicks. RightSignature charges \$14/mo/user.

### **E-Signature**

E-Signature is different from the others mentioned. Its service is intended more for documents you need to sign. For a one-time fee of \$44.95, they’ll create a signature font that looks like the signature you send to them. From then on, any document that requires your signature or initials can be inserted with a few key-strokes.

Use your font to insert signatures in letters as well. According to E-Signature, your signatures cannot be copied by recipients.

## Chapter 9

*Because each participant has a unique web page displayed live on their screen, they can complete their own form and their information isn't seen or shared with others.*

### Multi-Media Presentation Tools

#### Cynocast

Cynocast, Pronounced 'sin-uh-kahst', is an interactive presentation technology that runs directly from your own website. Cynocast is different from anything else I've seen. You can deliver presentations already via Web meetings like GoToMeeting and WebEx, however Cynocasting offers some real advantages.

First of all, sales reps don't need to spend time setting up an online meeting. Instead, they simply give a Web address to their participants. The Web address uses your own domain, which is good for branding purposes.

Second, sales reps can deliver impromptu Web presentations to the recipient's desktop with no logistical worries when they use Cynocast.

And third, participants can interact with their own screen since it's a Web page served up to them individually.

Traditional Web meetings are delivered basically by sharing. Why would you want participants to view a presentation individually (rather than via screen share) and be able to interact? The best example I can give is that you can present sign-up or order forms for each participant to complete right there.

Because each participant has a unique Web page displayed live on their screen, they can complete their own form and their information isn't seen or shared with others.

*We all know  
“send me some  
information”  
means “I’m not  
quite sold and I’ve  
run out of time or  
patience.”*

You set up your CynoCasts ahead of time using the ‘Live Dashboard’ tool. Each CynoCast contains a mix of information and document types that you can display to your prospect as needed, in any order. If you discover the need to display a file or webpage that isn't already in your CynoCast, you can add it on-the-fly.

Need to explain the financing options? Easy - instantly deliver the finance forms right to their screen. And here's the cool part: You can help them fill it out right then and there. CynoCast costs \$39/user/month.

### **Kineticast**

Kineticast also offers a unique capability for presenting information to prospects. Imagine the following scenario: You've got a prospect on the phone and are asked to “send them more information.” Do you get a sinking feeling in your gut? We all know “send me some information” means “I'm not quite sold and I've run out of time or patience.” So, it being your only choice, you send them information.

Perhaps you send a well thought out e-mail message including a few links to your Web pages along with an attachment. Then you hope for the best and you put a reminder in your CRM to follow-up on the information you sent. What else can you do?

You can use KinetiCast and turn the unfortunate situation into an opportunity. KinetiCast describes its solution as one that “empowers users to create, e-mail and track engaging online presentations that can help to better qualify prospects, shorten sales cycles and close more deals.”

<sup>2</sup> PowerPoint, PDF, Word Documents and spreadsheets

## Multi-Media Presentation Tools

*Where “send me more information” takes away sales reps’ power, Kineticast gives it back.*

Let's break that out. First, you **create** the presentation by uploading a PowerPoint document into your Kineticast account. From there, you can enhance the presentation with video clips, links, audio and downloadable files. Kineticast then converts the entire presentation into Flash which allows it to be viewed on line.

Then you send a URL link to the presentation in the body of an **e-mail**. The link lets them access the presentation online ensuring deliverability and eliminating the need to download large file attachments. The threat of a presentation being automatically sent to a spam folder is eliminated because there are no large file attachments.

Advanced analytic features then allow users to **track** who opened the presentation, how many times it was viewed, how long it was viewed and whether it was forwarded. This helps you qualify your prospect's interest level and time your follow-up so you re-engage at the right moment.

Where “send me more information” takes away sales reps' power, Kineticast gives it back. Using their personal Kineticast dashboard, they can quickly:

- View the activity for all their presentations
- Analyze individual viewer statistics
- Know who viewed the presentation, and the number of times
- Learn how long they spent on each slide
- See which links within the presentation the viewer clicked on
- Discover if the presentation was forwarded and to whom

“Send me more information” isn't so bad after all.


*That demonstrates to the prospect that the sales rep values them and will treat them with the attention they deserve.*

Another important benefit is that sales reps can quickly personalize standard presentations for each lead with text and/or video. That demonstrates to the prospect that the sales rep values them and will treat them with the attention they deserve. The video also helps the prospect put a face to the name, a more personalized approach where the prospect sees the rep as more than a stranger simply dialing for dollars.

Kineticast offers a free trial but you must contact the company to learn about the pricing options. To learn more, or to see a demo, click on a link below.


## Wondering how to achieve your 2010 sales goals?

ENERGIZE YOUR SALES PROCESS WITH KINETICAST.




**KineticCast's online presentation tool easily enables:**

- Personalized presentations enhanced with video
- Rich media presentations delivered via e-mail without attachments
- Tracking of viewer behavior – know who's interested and what they're interested in



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CALL US AT **800.520.8606** OR E-MAIL [SALES@KINETICAST.COM](mailto:SALES@KINETICAST.COM) TO REQUEST A FREE TRIAL TO EXPERIENCE THE ROI BEFORE YOU BUY. TO LEARN MORE, VISIT [WWW.KINETICAST.COM](http://WWW.KINETICAST.COM).



## Chapter 10

*CRM isn't meant to - nor does it - do a good job with the many tasks essential to managing a sales organization.*

### Sales Management Tools

Sales managers deserve tools of their own. A sales organization's ability to meet or exceed quota depends on the sales manager's ability to execute. From hiring sales reps to territory planning, creating compensation plans, managing expenses, conducting sales meetings and training the team requires experience and the right tools.

For quite some time, CRM was *the* tool for sales managers. And it still is. But there's a vast universe of products and services outside of CRM.

CRM is good for forecasting purposes and to get detailed reports on sales opportunities and sales rep activities. But CRM isn't meant to - nor does it - do a good job with the many tasks essential to managing a sales organization.

### Territory Management

If you don't assign territories based on account or company name, you likely assign them by geography and/or industry. In either case, it requires a mountain of data - and the time to analyze it - to align and optimize territory assignments. There's a lot at stake. Making sure that reps have equal opportunity and equal responsibility can be difficult at best. And if unsuccessful, it can have a devastating impact on morale and revenue.

Territory management goes beyond the once-a-year evaluation and re-alignment. It may need to be done throughout the year based on business events. If you've just launched a new product, it might be prudent to rethink assignments.

*TerrAlign e-Map appears to be aimed squarely at companies with a lot of feet on the street.*

Likewise if you've changed your market strategy, added to (or downsized) your sales organization or if you will be acquiring or merging with another company.

If you rush to realign in the face of these events, your entire revenue plan could be at risk.

The tools available for territory management and optimization include solutions from TerrAlign, GeoMarket, AlignStar and Mapping Analytics.

### **TerrAlign**

TerrAlign e-Map is a Web-based tool that allows users to manually move geography and/or accounts via a map interface and view the possible impact of the new alignments.

With the ability to analyze territories by zooming and scrolling maps, adding roads, boundaries or other reference layers and accessing customer data, sales managers can reassign accounts and/or geography between territories and print maps and reports – all from a browser. And it eliminates the hassles of assigning all ZIP Codes and accounts by hand.

TerrAlign e-Map appears to be aimed squarely at companies with a lot of feet on the street. TerrAlign does not reveal its pricing publicly.

*AlignStar is a software tool designed for businesses that need to manage, optimize, analyze, align or realign territories.*

### RegioGraph

GeoMarketing, maker of RegioGraph, provides integrated solutions including software, digital maps, market data and consultancy services. With RegioGraph, you can do customer and market analysis and sales territory and salesforce optimization.

You can import your own customer and prospect data into this system and it will give you a visual push-pin map of their locations and other data points you've provided, for example turnover. RegioGraph automatically plans, optimizes, splits, expands and evaluates your external sales force structure based on the criteria you specify - e.g., turnover volume and drive-time accessibility. It seems complicated, but they say it's designed for easy use by business people with no geomarketing experience. RegioGraph prices range from \$1,485 to \$6,675.

### AlignStar

AlignStar is a software tool designed for businesses that need to manage, optimize, analyze, align or realign territories. It combines features used in designing territories together with a database, mapping technology (GIS), reports, thematic analysis, drive time information, territory diagnostics, analysis and state-of-the-art optimization algorithms.

AlignStar is designed for sales managers with direct sales, distributors and/or resellers. Therefore, it can be used to optimize multiple sales forces or distribution channels. It also can accommodate fixed sales regions, protected areas, and individual account exceptions such as national accounts, house accounts or field specialists.

*ProAlign Web provides secure access for authorized sales management to create, view and propose changes to territory alignments online via a Web browser.*

It offers four editions:

1. AlignStar Small Business Edition is designed for simpler applications with up to 25 territories.
2. AlignStar Corporate Edition is designed for businesses with fewer than 50 sales reps.
3. AlignStar Enterprise Edition includes additional functionality and is intended for businesses with more than 50 territories.
4. AlignStar Field Edition is designed to be used in conjunction with the Corporate or Enterprise Editions. It gives field sales managers the power to make changes to territories, print maps and reports, perform "what-if" analysis and send any alignment changes back to the home office via e-mail where they can be approved and integrated into the master document.

In addition, the company now offers AlignStar Online. However, it doesn't appear to be a true Web-based application. Instead, it facilitates the ability for remote users to review the "headquarters" data which is housed on (and requires the purchase of) one of the AlignStar editions. AlignStar pricing starts at \$2,295.

### **ProAlign Desktop and ProAlign Web by Mapping Analytics**

ProAlign software combines database, mapping, reporting and graphics, plus optimization algorithms to help you make territory decisions that will improve sales productivity. ProAlign Web provides secure access for authorized sales management to create, view and propose changes to territory alignments online via a Web browser.

*Its remote access facilitates collaboration which in turn can shave weeks off the process of developing complex sales territories.*

Its remote access facilitates collaboration which in turn can shave weeks off the process of developing complex sales territories.

ProAlign comes with a comprehensive data set you need for sales territory balancing, including boundaries for states, counties, ZIP Codes, MSAs as well as highways, roads and city streets. Custom data sets are available.

With ProAlign you can start by analyzing your existing data, which may include your current sales organization hierarchy, your sales reps, customers, prospects and existing territories. A geocoding process then checks for address errors and corrects and updates the database.

The data then gets overlaid onto a map and is aggregated into charts and tables for easy analysis. Then it's time to add additional data points such as current revenue, forecasted revenue and lead quantities.

The result is a series of maps, charts and reports that provide a "lay of the land."

This first step is invaluable, surfacing inequitable or illogical territories and oversaturated or underserved areas.

*The second step of the ProAlign system is building a pro forma territory alignment. Scenarios can be played out based on various criteria.*

The second step of the ProAlign system is building a pro forma territory alignment. Scenarios can be played out based on various criteria such as:

- Revenue potential for each territory
- Number of accounts or workload per territory
- Number of territories required or desired
- Proximity of sales reps to customers and prospects in each territory

## Give Your Sales Territories a PRODUCTIVITY BOOST

Studies have shown that 80% of companies are missing 2-7% of unrealized sales because their territories are not properly designed. **“Three Steps to More Productive Territories”** is sales executive brief from Mapping Analytics that outlines a valuable process for improving the performance of sales territories, allowing you to:

- Generate more revenue from your territories
- Reduce travel and associated sales costs
- Improve morale and maximize opportunity for your entire sales team



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### Sales Management Brief



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*A sales manager has to balance the desire for high incentives which drive motivation with the desire to remain fiscally responsible.* ””

The third step is to optimize the pro forma models. ProAlign Territory Optimizer is an optional add-on to ProAlign Web and optimizing territories isn't necessary for everyone.

Territory optimization is used to calculate what the most compact territories are in terms of geography and accounts and what would result in more balanced territories in terms of workload or other factors.

ProAlign Desktop and ProAlign Web (which includes Desktop) start at \$6,000. Mapping Analytics, maker of ProAlign solutions has a number of educational reports and executive briefs that I recommend - including the one below.

### **Quota and Compensation Management**

Incentive Compensation is one of the greatest levers you have to align the sales organization with your company strategy. Sales managers can quickly drown in the data that's needed to design the right plans. Sales reps, Finance, Human Resources and the executive suite all have ideas (and demands) to take into account. A sales manager has to balance the desire for high incentives which drives motivation with the desire to remain fiscally responsible.

Some solution vendors bundle compensation management with territory management, quota planning and sales analytics. It's generally referred to as Sales Performance Management (SPM).

*Commissions Manager is a claims-based system where sales reps submit their statements of earned commissions for imbursement.*

## Varicent

Varicent is one SPM solution sold to large corporations. It now has an on-demand version which would be more suitable to small- and medium-sized companies.

Varicent's compensation management allows users to build and modify complex incentive compensation plans using a wizard interface.

Using the Varicent Composer wizard, users can view and edit graphical representations of calculations and business rules.

A recently added feature called Presenter makes it easier to generate and distribute highly formatted and customized reports.

In addition to compensation management, Varicent SPM includes quota planning, territory management and sales analytics all in one. Varicent does not publically disclose its pricing.

## Commissions Manager by Callidus

Callidus offers another well known solution called Monaco Suite, a comprehensive Sales Performance Management System (SPM). Sophisticated SPM software for large companies comes with a large pricetag. However, Callidus has announced Commissions Manager which is aimed at and priced for small- and medium-sized companies.

Commissions Manager is a claims-based system where sales reps submit their statements of earned commissions for imbursement.

## Sales Management Tools

*Reps are able to track their commissions more closely which lets them have more insight into how they will get paid.*

It's very much like an expense management system where you submit your expenses for payment.

Callidus Commissions Manager enables companies to set up compensation plans that include quotas, on-target-earnings and rate tables to pay commissions on a per-transaction basis or on year-to-date attainments. It is a self-service solution that allows sales representatives to initiate requests for credit and payment on closed opportunities.

Sales reps can calculate commissions on closed opportunities using the plans that have been assigned to them building trust in the process and system. The payment requests are then automatically routed to their manager via a configurable workflow. Approved payments are tied back to the opportunity and can be exported to financial or payroll systems.

Reps are able to track their commissions more closely which lets them have more insight into how they will get paid.

Sales reps can also track their deal status and projected commissions, initiate claims for credit and payment on their closed deals and then track the status and amounts of paid and pending commissions, all as part of their day-to-day opportunity management. The price is \$50/user/month.

*You can base plans on custom criteria, such as deal amount, product margin, product mix, discount percent, or non-cash values*

### **Incent Express by Xactly**

Xactly is also a large player in Sales Performance Management (SPM). At Dreamforce, the company announced its small- and medium-sized business program called Incent Express. It runs on Salesforce.com and it allows those CRM users to create sales compensation plans, calculate commissions and export payments to payroll, all from Incent Express.

You can base plans on custom criteria, such as deal amount, product margin, product mix, discount percent or non-cash values (like hours or quantity of deals). And because it runs on Salesforce.com CRM application, it allows users to calculate incentives using up-to-date information about accounts, people, products and opportunities.

One great feature for sales management is the ability to play out different compensation plan scenarios prior to implementation so you'll know which will fit within your budgets, helping to avoid future surprises with over-compensation. Xactly does not publically disclose its pricing.

### **Motivator Pro by Makana Solutions (now a Salary.com company)**

Motivator Pro is a self-service sales compensation management system. It's a Web-based system designed for easy use even by people who have never designed variable compensation plans before. Users are guided step-by-step through an on-screen wizard. You can even start using one of the built-in sample plans.

*After entering your data into the planning wizard, use the system's visual tools to bring your sales compensation plans to life.*

After entering your data into the planning wizard, use the system's visual tools to bring your sales compensation plans to life. Review the details of an individual plan or compare plans side-by-side. Graphically view payout at any level of attainment to ensure there are no surprises. Adjust the mix of base and incentive pay until you get it just right. Even compare this year's projected compensation to last year's payout for each individual. You'll clearly see the impact of every change you make — at a glance.

When you're ready, it's a snap to generate clear plans for every member of your team. Publish PDF documents that graphically communicate goals and rewards at any time of the year so your sales reps know where to focus their efforts. When you're ready to calculate payments, Motivator Pro loads your transaction data to determine who gets credit then it calculates the payments. Motivator Pro uses the same calculation rules you created during planning to automate crediting and payment calculations. Makana Solutions no longer publishes its pricing on its web site. When we last obtained pricing in May of 2009, the cost was \$19/month/account.

### **Business Expense Management**

If your sales reps are on the road selling, they're inevitably spending money in the process. Travel, entertainment and administrative costs are often incurred by the sales rep who must get reimbursed for those expenses. I don't know of a single sales rep who likes dealing with expenses.

Keeping track of and logging receipts is time-consuming. It's a bothersome nuisance that sucks time and energy from a sales rep's schedule.

*Expense management is a double-whammy killing the 215 of both sales managers and reps.* ”

At the same time, sales managers must also devote time to the process since they're the ones who have to review, approve and forward each of their team members' reports onto finance.

Expense management is a double-whammy killing the 215 of both sales managers and reps. What follows is the maddening cycle of activities related to logging, submitting, tracking and reimbursing expenses.



There are a number of sales tools designed to help both sales reps and managers with this process.

*Users also have the ability to attach scanned receipts to the file so no hardcopies of receipts or forms are required.*

### **ExpensAble**

ExpensAble offers a desktop solution which is designed for smaller companies, those with 10 or fewer filers. Its online, Web-based version is for large corporations and is a more comprehensive expense management solution.

ExpensAble includes a user interface for completing expense report forms using policies and expense types defined by their administrators. Users also have the ability to attach scanned receipts to the file so no hardcopies of receipts or forms are required. Then the digital form is routed using administrator-defined workflows. Currency conversion is built into the system as is a credit card genie which lets users select corporate card charges and quickly pre-populate expense reports.

Administrators can view reports to analyze expense trends, and spending by categories, employees, departments, and merchants. Pricing for ExpensAble is not available.

### **ExpenseAnywhere by Virtual Communications, Inc.**

ExpenseAnywhere also offers both a desktop version and an online, Web-based version. It's also considered an end-to-end solution which starts with expense entry and continues through approvals and escalation, audit and reimbursement, reports and analytics and user management. It includes the ability to define workflows, and it supports multiple currencies.

You can connect the system to your enterprise resource planning (ERP) system as well. ExpenseAnywhere is a "roles-based" system with specific levels of functionality for each user-type within the organization.

*These processes are initially developed by and implemented with the Virtual Communications team during what they call the “Rapid Implementation Process”.*

These roles are the traveler, the approver, accounting and administrator.

Using the Profile Manager the administrator provisions specific functionality for each user type involved in the expense management cycle. This component establishes how different user-types and functional groups of the organization interface with the system.

The system also includes a Corporate Policy Manager which is the run-time functionality checks, flags and/or enforces, and reports on any variations from corporate travel policy. Specific checks are set up by the administrator to implement the policy guidelines. Flags and appropriate messages are displayed to the user when variations are encountered.

The Systems Configuration component manages the processes that provide data exchange between ExpenseAnywhere and the corporate credit card input files, ACH (direct deposit system), financial systems, Human Resources systems and imaging systems.

These processes are initially developed by and implemented with the Virtual Communications team during what they call the “Rapid Implementation Process.” Pricing for ExpenseAnywhere is not publically available.

*One thing I particularly like is the ability to add receipts that have been captured with an iPhone, Blackberry, smart phone, webcam, scanner, or a fax.*

### **Certify**

Certify is a self-service, online expense management solution for small- to-midsize companies. All users can access the system anytime from anywhere. Each user has their own home-page where they can complete new expense reports, view the reports that are still pending approval and view reports which have been approved.

One thing I particularly like is the ability to add receipts that have been captured with an iPhone, Blackberry, smart phone, webcam, scanner, or a fax. Imagine you've just finished a client lunch. Simply take a snapshot of the receipt with your smart phone and upload it to your online "Certify wallet." Then you no longer need the physical receipt and it's now available in your online wallet for you to associate with the proper expense line item.

No need to collect a mess of receipts to input at a later time after you've forgotten the "who," "when" and "why" associated with the expense.

You can even capture a line item from an online credit card statement without exposing confidential details like account number. No more copying your statement and blacking-out account numbers or personal balances.

Certify will even convert foreign currency expenses automatically, based on the precise date of each expense.

*Certify also offers a host of reporting tools. Managers can clearly see who is spending what, and how it impacts overall T&E budgets.*

The administrator has a dashboard as well where s/he can easily manage the system. It's there where s/he can edit and post the employee travel expense reimbursement policy that becomes available for all users to view through their dashboard.

Administrators can also view and edit the different expense categories and other variables such as automobile reimbursement rates, preferred travel partners and user profiles. Once a user clicks to submit his or her expense reports, the administrator can immediately identify expenses which are in excess of company policy and track it through the approval process.

Certify also offers a host of reporting tools. Managers can clearly see who is spending what and how it impacts overall T&E budgets. There are many report options: Expenses by category, by employee or by date are three examples.

The analytic component allows you to review and analyze your expenses in great detail. For example, you can track average costs for hotels and airfare, calculate average expense amounts per employee and report your total expenses by month or quarter. You can even identify chronic offenders of your corporate travel policy.

The Policy Enforcement component automatically integrates your expense policies with the approval workflow. Any items in excess of the company policy are automatically flagged for employee and approvers to see.

## Sales Management Tools

To facilitate quick payments of expenses, you can easily export expense report data which can then be imported directly into your Payroll, Accounts Payable and General Ledger systems. Certify is less than \$10/mo/user.



Use  
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*Upon subscribing to their service, you receive a weekly - professionally developed - sales team meeting agenda sent directly to your inbox.*

## Sales Training and Sales Meetings

Taking time to train sales reps is a known 215 killer as is time taken for weekly sales meetings. Remember, 215 killers aren't to be eliminated necessarily: They can simply be made more efficient. There are two clever solutions that I felt are worth a mention in this report.

### Meeting to Win

Meeting to Win offers pre-packaged weekly sales meeting kits. With so many responsibilities to juggle, it's difficult finding time to prepare adequately for every sales meeting. What if you could receive a weekly, pre-planned sales team meeting with fresh topics delivered straight to your inbox? That's exactly what Meeting to Win does.

Upon subscribing to this service, you receive a weekly - professionally developed - sales team meeting agenda sent directly to your inbox. It includes easy-to-follow instructions on the agenda.

Meeting agendas are packed with opportunities for your team to collaborate on deals, strategize about prospect accounts and set clear priorities. Sales managers don't use Meeting to Win because they aren't capable of constructing well thought-out agendas. They use Meeting to Win because they can conduct great sales meetings and save a lot of prep time all at once.

*The highly interactive format is designed to energize your sales team and to be informative at the same time.*

Sales Meeting Agendas are based on:

- Latest Trends on Selling and Buying
- Creative Sales Skill Exercises
- Sales Team Involvement

You can get your first three sales meeting agendas for free. The cost is \$10/mo after that.

### Sharpenz

It's tough to set aside important selling time to train your sales team. That's why Sharpenz developed its "Half Hour of Power" sales boosters. They're designed to energize, motivate, focus and engage your sellers in just 30-minutes. I think it's an interesting idea that seems to fill a need.

Use Sharpenz sales boosters to jump-start your next sales meeting. The highly interactive format is designed to energize your sales team and to be informative at the same time. Each 30-minute sales training booster includes:

- Word-for-word Leader Outlines
- Success Set-up Tips
- Copy-ready Success Achievement Plan Worksheets
- Reinforcement Tips

## Sales Management Tools

*Each sales booster comes with a leader's guide and a Sharpenz success achievement plan handout.*

You select the topic from a comprehensive list. Topics are categorized so you can find the right one easily. Example topics are;

- Beg or Brag
- Better Questions
- The Feature Benefit Link
- Working Through Objections
- Advancing the Sale
- Communication Types and Tools
- Selling the Way People Want to Buy
- Funnel Questions
- Keeping the Pipelines Full
- Customer Loyalty

Sales managers need to devote just 15-20 minutes of prep time. Each sales booster comes with a leader's guide and a Sharpenz success achievement plan handout. You can try one sales booster for free. Pricing is \$237 per five-topic bundle.

## Summary

*It pains me to know that many sales reps are pushed simply to make more phone calls, to go on more sales calls and to send more quotes.*

When I set out to write this e-book, I wanted to talk about sales productivity in a new way. I wanted to show that investing in sales tools leads to productivity gains and why. It pains me when I hear sales managers talk about their \$100,000 budget for sales tools only to find out it's all allocated to CRM licenses. It pains me when I hear people say \$5 per month per sales rep is too much to spend on a sales tool. It pains me to know that many sales reps are pushed simply to make more phone calls, to go on more sales calls and to send more quotes.

As sales managers, we aren't used to the notion of deploying technology. Most of us aren't technology people. We're salespeople. We know how to get in front of customers and when we do, we know how to uncover needs and communicate our value.

Evaluating and deploying technology wasn't part of the deal. We have enough to do just to keep our sales reps on track and close enough deals to propel our company forward.

Even if we were into technology, the executive suite isn't used to budgeting for sales tools. Software to run accounting? Yes. Software to run engineering? Of course. Software to run manufacturing? You bet. Software to manage sales reps' activities? Sign us up.

But software tools to help sales reps do what they already do - only do it faster, and easier? Can we really afford that? I can hear it now.

*In order to spend more time with customers, we have to reduce the time it takes to do everything else.*

“What do you mean you want \$500 a month so sales reps can “buy” a contact off the Internet, “collaborate” with colleagues, get “prospect research,” schedule appointments, mail collateral, or get customers to sign electronically”?

It all sounds a bit preposterous. Why should we spend \$500 a month when we can do all those things now? Nope. No way. It's not in the budget!

This clearly misses the point. In order to sell more, we have to spend more time in front of customers. In order to spend more time with customers, we have to reduce the time it takes to do everything else.

We owe it to our team and to our company to consider the impact on selling time as a critical factor when we make a decision to do or not do something such as deploy a new technology.

We ask how much something costs. We ask how much time it will take to implement. We ask can we get by without it but we don't often ask how it will impact time with our prospects.

To do things differently means change. In Seth Godin's book “Small is the New Big,” he raises this question, “Why is it that the big opportunities, the really obvious chances that we get to improve our businesses and our careers, almost always pass us by? Big opportunities bring change, and change is painful. As long as ‘opportunity’ means change and as long as ‘change’ means pain, we will continue to miss our chances.”

What changes will you make to help your sales reps sell more in 2010?

*Smart Selling Tool's mission is to find these tools, analyze what they do and then let the world of sales professionals know about them.*

## Epilogue

I wish I was able to list all of the sales tools in this e-book. But that would have required a much longer document and by the time I finished writing it, it would need updating. The truth is, there are a lot of great tools out there.

Smart Selling Tool's mission is to find these tools, analyze what they do and then let the world of sales professionals know about them. It may be an impossible mission. For example, there are over 100 CRM programs on the market - and new sales tools are being introduced every day. That's what makes the mission so exciting.

But you – you've got a different job to do and that's selling. You don't have the time to investigate all of the options. Believe me, it's a full time job for a team of people. That's why we do what we do.

Our goal is to present information on tools in a way that makes it easy to search for, find and learn about them. We'd love to hear from you if you have ideas for making the site better.

*If you have questions or comments about any content in this report click on the "post a comment" button which can be found on the bottom of every page.*

*You are welcome to forward a copy of this report to your friends and colleagues as long as it's sent in its entirety with no alterations.*

## Appendix A

### Trusted Resources

- SalesXcellence [www.salesxcellence.com](http://www.salesxcellence.com)
- Sales Association [www.salesassociation.org](http://www.salesassociation.org)
- Amer. Assoc. of Inside Sales Prof. [www.aa-isp.org](http://www.aa-isp.org)
- Selling to Big Companies [www.sellingtobigcompanies.com](http://www.sellingtobigcompanies.com)
- No More Cold Calling [www.nomorecoldcalling.com](http://www.nomorecoldcalling.com)
- The JF Consultancy [www.jonathanfarrington.com](http://www.jonathanfarrington.com)
- KLAGroup [www.klagroup.com](http://www.klagroup.com)
- Score More Sales [www.scoremoresales.com](http://www.scoremoresales.com)
- Sales Pro Insider, Inc. [www.salesproductivityinsider.com](http://www.salesproductivityinsider.com)
- Performance Based Results [www.pbresults.com](http://www.pbresults.com)
- McCord Training [www.mccordandassociates.com](http://www.mccordandassociates.com)
- Sales Evolution [www.salesevolution.com](http://www.salesevolution.com)
- Star Results [www.starresults.com](http://www.starresults.com)
- Top Sales Experts [www.topsalesexperts.com](http://www.topsalesexperts.com)
- TeleSmart Communications [www.tele-smart.com](http://www.tele-smart.com)

## Appendix B

### Fill the Funnel

Selecting the right sales tools is key to protecting the 215 and increasing sales. However, if you're in sales, you're busy selling!

Miles Austin is founder of Fill the Funnel, a company that helps sales managers with the selection and implementation of sales tools and the training necessary for your team to benefit quickly.

The last thing you want is for the implementation of new tools to distract your sales team from selling. Fill the Funnel can minimize the distraction and maximize your return on investment. You can reach Miles at [www.fillthefunnel.com](http://www.fillthefunnel.com)