USING CALL CENTER TECHNOLOGY TO AUTOMATE THE SALES PROCESS

By Bob Howard

Bob Howard is founder and managing director of SalesLogic, LLC (*www.sales-logic.com*), an international sales consulting and outsourcing firm focused on consulting, technology and professional services. Through the company's team of OverDrive™ consultants and proprietary sales processes, SalesLogic's "win rates" typically increase by 50 percent, while sales cycles quickly decrease by 50 percent.

You've got a great idea, but where do you turn to execute that idea and realize success? Accounting firms spend much of their energy and efforts delivering on-point client deliverables, and yet, find themselves with a real-life *lack of time* to implement various activities, including cross-selling the firm's services to existing clients, marketing their skills and services to prospects or even increasing sales on the reseller front.

For accounting firms, this lack of resources to take ideas to the marketplace is one of the reasons they turn to outbound call centers — and it's not just the Big 4 that are using call centers to generate a buzz. Although the accounting profession mostly hears how call centers benefit the ultra-large firm, many smaller firms that learn about the benefits weighed against the costs realize the advantages inherent in using centers to boost profits. In short, call centers provide firms with the resources needed to take their message to target markets.

Call center technology is the software applications and hardware that control the phone calls received or dialed by call center agents, as well as the database that captures the results of each call. According to the American Teleservices Association (ATA), tele-services generated $661 billion in revenues in 2002 on 180 million sales transactions and, as an industry, employed 5.7 million people — one of the most aggressively growing segments of business process outsourcing.

Because of that growth, the efficiencies of the Internet and the eventual proliferation of voice over IP, the technology investment within the call center market segment has remained

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robust over the past couple of years, helping create even greater efficiencies.

Call center technology can be defined by the niche a call center serves, as well as the necessities of that niche, including inbound calls, outbound calls and market research that relies on specific mechanical advantages like predictive dialers, call routing and hunt groups. Call centers also tend to be narrow in their focus. For example, agents that primarily make only outbound sales calls probably would not do market research. Many large call centers offer a variety of services, but most have chosen a niche they can profitably serve.

"Sales automation achieved through call centers can provide phenomenal results when used deliberately and strategically," says Toby Gilman, senior vice president of Dallas-based SalesLogic. "Many people think this is just one step away from telemarketing, but in fact, the entire process is very professional and actually a lot of fun. It's about delivering results."

Gilman, formerly with Ernst and Young, LLP, combined a powerful marketing strategy with college graduates to generate a results-oriented marketing message to contact and set appointments with 5,000 executives who work for Fortune 1,000 companies. Within 20 months, these appointments resulted in *$100 million* in incremental revenue for the Big Four firm — all at a cost of less than *$1 million*.

"Call centers provide access to the marketplace; however, many variables must come together to drive results," says Gilman. "Our outbound representatives were college graduates who were articulate and could speak in business terms, and the product itself offered incredible results. We were able to leave a message and have the CEO of the company actually call us back."

"Because of the narrowness of what most call centers offer, they easily become very efficient," says Mike Garzillo, SalesLogic's vice president of Technology, and a principal member of the team responsible for implementing Symantec's CRM. "That's valuable insight for most every business because whatever part of your sales process you'd like to improve, there's probably already a call center somewhere offering a more efficient solution. However, efficiency is not realized just because of the technology, it's also because of the training and discipline of the agents to conform to a refined, consistent business process that best uses that technology."

Good Initial Steps

All parts of your sales process could probably become more efficient, and the first step is that you must accept that sales will always be a people-dependent reality. Multiple people in various roles will create unavoidable inefficiencies.

Eight Sales Force Automation Considerations

Here's an eight-point checklist to determine whether you need a Sales Force Automation (SFA) program:

1. Do you want your sales data to integrate with your financial systems or other existing databases?
2. How do you currently compile, run and report your sales forecast?
3. Is a lack of adoption/acceptance of your current SFA because of technical problems (lack of synchronization or unreliability, a slow application on the desktops, it isn't modifiable enough, the database makes it difficult to run reports)?
4. Do you want data warehousing functionality so you can analyze your sales data?
5. Do you want your sales managers to have administrative access to the data or are they only interested in seeing the reports?
6. How segmented are the roles within your sales force?
7. Do you have remote reps and how will they access the system?
8. Do you want the tool to be a Web-based application?

"Many companies think automating their sales process means fixing everything — diluting the impact they could have had on one specific area," says Garzillo. "Scope creep is normal when considering any form of sales automation, but conceding to it can become very expensive and threaten your return on investment. Any VP of sales can tell you what he'd *like* to fix; the challenge is knowing what will produce the greatest increase in revenue."

Start by writing down the roles of your current sales staff and how they fit into your sales process. Build a diagram that reveals your sales process to be a flow through various roles. In doing so, this will reveal the redundancies and bottlenecks that are probable areas of investment. If the flow is reasonably smooth with little redundancy, then look to see where the biggest impact could be made by suddenly adding many more people (i.e., identifying replicable tasks). Your technology investment will prevent you from needing all those bodies, but it's a good indication of the potential impact of investing in that role. And, consider the narrowness of the role.

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"The lesson to be learned from call centers is that every person does a very specific, narrowly defined role the most efficient way possible," says Garzillo. "If you have a sales role that you can narrowly define and that role has a big impact in either creating more leads or closing more sales, it will be easy to institute consistent behaviors that will best use the technology you invest in. Your people have to have a disciplined, consistent methodology or the technology won't effectively leverage your efforts."

You can fix multiple problems and roles with the same technology investment, if those roles have enough commonality that the narrowness of task is a fit for the tool. For example:

- If you're in a high transaction business, do you have reps that only prospect while others close business? That's an opportunity to consider a predictive dialer (technology that automatically dials prospects).
- Do you have a tech support group as well as customer service reps that needs to interact with prospects *and* customers, and you want to know the details of all those conversations? That's an opportunity to consider a sales force automation system that has a back-end infrastructure designed for multi-department use. Multi-department use is usually handled by a Siebel implementation, for example. Tech support and customer service reps enter the results of their phone calls into the database, as does sales, and the databases are commingled so the information can be cross-referenced by each department.
- Do you want to have a record of everything said to a prospect by the reps so you can sort all the data and determine which approaches are most successful? That defines a back-end data warehouse with drop-down script capture. Instead of typing in text as a way to record the answers to every question, the caller can choose several choices from a drop-down menu, and pick a specific choice that best matches what the prospect or customer said. As a result, there are only a limited number of choices for each question and its much easier to analyze the data

Knowing what solutions fit your scenario is merely a matter of creative market research. As soon as you define the area you would most like to improve, start talking to local call centers about what they can do for you instead of you doing it yourself. If they can't help, get a referral. Eventually, you'll find a call center that specializes in outsourcing exactly what you want to improve upon. Ask them how they'll do it and the tools they use. That will lead to the solutions, which leads to the vendors that specialize in the specific equipment or software the call center is using.

The Cost of Sales Force Automation

Sales technology can cost anywhere from a few hundred dollars for phone switch improvements to a few million dollars for a new sales force automation (SFA) system; however, there are solutions available for virtually every budget.

"The most expensive thing about sales automation is mistakes," says Garzillo. "Even if you expect to do a great job of defining your needs, always start by bringing into the conversations your best possible technical resource, hopefully your VP of IT or CIO, and define what your environment and budget can and can't handle. That will wisely narrow your choices."

The most common investment is usually a more sophisticated SFA. In addition to an outsourcing model, SFAs can be priced at a monthly cost per user, or a single fee for the software based on number of users, plus any necessary hardware.

"Try before you buy is always a wise strategy," says Garzillo. "If you can outsource on a test basis or subscribe to an application service provider that charges you monthly for an SFA, that's close to what you want, and a great way to see if the process increases your sales results as much as you'd hoped. In addition, data import and export can be a challenge, but is always cheaper than a system you shouldn't have bought. That's the best part about automating sales; you can usually tell very quickly if you'll eventually see a significant ROI. You'll also learn more about what you *don't* want, and that helps too."

Adopt new Behaviors

Many disappointed companies thought that investing in sales automation technology would solve their problems, but their sales force found ways to keep doing what they were doing before, which was much more of the problem than the previous tools.

According to Garzillo, "A new technology solution can create a mandate within the sales organization to suddenly adopt more consistent behaviors. Combined with technology, this will produce significant revenue increases. Call center technology is sophisticated and niche-specific because call centers already have accomplished what few sales organizations can achieve — narrow roles interacting with a tool that takes advantage of that consistency.

To take full advantage of call center technology, take an approach that focuses on changing behaviors, exploits technology efficiencies and depends on a marketing strategy to drive the machine.

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