SALES FORCE AUTOMATION
A guide to get you started!
# Understanding the Depths of Sales Force Automation

- Types of SFA Solutions
- Problems Pertaining to Sales Force Management
- Addressal by SFA Solution
- Features/ Functionalities of an SFA solution

# Benefit Analysis of SFA Deployment

- Persona-wise Breakdown

# For Best Results with an SFA Solution

- What All to Ensure
- What All to Avoid

# Conclusion - Taking the Plunge

- Reach Out
Introduction

Business are built on strategies and execution. None without the other is enough to make it a success story.

When you have a part of your team on ground, their proper management plays a big role in ensuring that your execution is on-track.

Insight into employee accountability, lost opportunities, prioritisation, market intelligence and much more – there’s so much to manage. After all, that’s where lies the last mile!

Enter Sales Force Automation or SFA – An acronym which drove the growth of an industry!
Surpassing the Proof of Concept Stage

Sales Force Automation, a concept introduced to the world in early 90s has undergone extensive iterations and what we have today is one of the most advanced avatars of SFA.

But we are the greedy human creed, we don’t settle! With technology integration, the advancements in SFA solutions are always underway – even as you read this.

In 2017, the sales force automation (SFA) market grew by an estimated 15.7% to $6.2 billion, with almost all the growth relating to cloud-based offerings as per Gartner SFA Magic Quadrant 2018.
In simple terms, it is about using an automated system to manage the various aspects of your on-ground team while optimising your sales process.

Now, what goes into that ‘automated’ system is where it starts getting complex – and interesting!

Let’s begin unravelling the complexities...

**Types of SFA solutions:**

- **On-premise** Sales Force Automation System
- **Software-as-a-Service (SaaS)** Sales Force Automation System
- **Cloud-Based** Sales Force Automation System
How does an SFA tool help you manage the sales force?

Let’s divide the question into 3 parts for the ease of understanding.

• What are the problems plaguing sales force management?

• What does an SFA solution do to address those problems?

• Are there any measurable parameters to judge the success rate?
Exploring the Dungeons

To understand any solution, the best approach is to first fully understand the problem that it caters to.

Monitoring the presence of your field force, tracking their productivity, ensuring information authenticity and capturing valuable marketing intelligence is difficult even if you are in the field, and more so when you sit behind a desk.
Cracking the **Specifics**

Let’s divide and look at the problems faced, segment-wise

**In the Realm of Sales Operations**
- Inefficient process of capturing sales data
- Limited visibility of the sales potential of channel ecosystem
- False reporting

**In the Realm of Stock**
- Limited stock visibility
- Limited supply chain ecosystem visibility
- Limited insights on marketing activities resonance

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**Productivity Loss**

**Low Last Mile Visibility**
Cracking the **Specifics**

Let’s divide and look at the problems faced, segment-wise

**In the Realm of Workforce**
- Flawed performance evaluation
- JCP deviation
- Absence of redressal mechanism
- No structured communication channels

**In the Realm of Business Intelligence**
- Limited market insights
- Non-authentic data
- Delay in data analysis because of manual reporting

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**Sub-Optimal Resource Utilisation**

**Weak Strategic Planning**
Simplifying Automation!

In sales, there is no mystic formula which resolves the problems at a finger snap and bring you closer to your goal instantly.

In the ideal scenario, that’s the nirvana to all your field force management worries!

*(Read our eBook explaining the way to do the implementation to deployment process right, every time)*

SFA comprises an amalgamation of multiple technologies, and therefore acts as a one-stop power-packed solution that dons multiple hats and ensures all your problem areas w.r.t. your sales force management are covered top-to-toe.

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What All A Typical SFA Solution Can Do

• Sales Force Tracking
• Web and Mobile Based Program Management
• Training Management
• Employee Engagement
• Demo Asset Management
• Issue Management System
• On-Ground Market Intelligence
• Fraud Detection System

All this and much more...

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Exploring the Benefits Within These Features

• Access to live & accurate sales data visibility
• Enhanced field force productivity
• Program scalability
• Effective stock distribution & management
• Connected sales teams
• Enhanced customer & market insights
• Increased market reach
• Engaged field force

In a nutshell, it’s about END-TO-END SALES CYCLE AUTOMATION and a significant INCREASE IN ROI.
What Does It Mean for You?

If you’re from the Senior Management, you’ll:
• Have ability to define effective sales strategy
• Have access to sales trends and demand forecasts
• Have visibility on channels responsible for increased revenue
• Have an edge over competitors with complete industry and competition landscape mapping
• Have effective resource utilisation leading to additional savings

If you’re a Manager dealing with on-ground supervisors, you’ll:
• Have an effective team management in place
• Deal less with abrupt changes in sales plan caused due to delayed information relay
• Be able to guide the field force in a more informed way with access to intelligent analytics
• Have effective competition-cracking plans with real-time market insights in tow
What Does It Mean for You?

If you’re a Supervisor dealing with on-ground workforce, you’ll:
• Witness minimized sales leakage
• Have better understanding of customer landscape
• Be adept at quicker issue resolution and close looping
• Have constant connection with the stakeholders at all levels

If you’re a field resource, you’ll:
• Have a well-planned JCP aiding productivity
• Have optimised target-completion owing to focused field plans
• Have a constant window for quick issue addressal
• Have real-time sales support and material access for better customer interactions
• Have reduced iterative manual jobs freeing up more time for sales
• Deliver optimised and error-free reporting using tools instead of manual consolidation
Can You Still Go Wrong?

Yes! The difference between understanding it right and implementing it right makes all the difference.

The Process Preview

Problem identification and analysis ➔ Solution selection ➔ Implementation* ➔ Team on-board to start using the solution, aka, successful deployment

*It is advisable to hire a trusted implementation partner instead of manoeuvring on your own.

If your SFA solution doesn’t come with a built-in BI engine, then the last step goes beyond deployment.

It becomes, integration of a Business Intelligence engine with your automation solution – enabling you to take informed decisions and make more full-proof future strategies.
Tips to Start on The Right Foot

• **Involve your team** since the beginning by engaging them in the testing and implementation phase itself (thus, building tool familiarity within team beforehand).

• **Have a clear vision** regarding what all you want to automate and what not in line with your organisational needs, resources and goals.

• **Don’t enforce automation** on your team, rather help them see the value-addition for themselves, not just for the company.

• **Plan in parts** and never rush into automation otherwise you risk a skewed transition of your team on to the new platform.

• **Invest in a secured automation solution** because automation means digitising your business processes, making you a vulnerable target for cyber-attacks.
What Pitfalls to Avoid

- **Losing sight of the goal** – If the planning part was not done with proper consideration of any probable future occurrence such as any likely acquisition or downsizing implementation process may become complex and never ending.

- **Getting charmed by a complex solution** – If the solution is not mapped against your existing processes, your teams will have a tough time adopting the same. Thus, defeating the purpose.

- **Seeding resistance to change** – Not including your teams in the process since the very beginning is bound to get you some inertia for adoption.

- **Drifting into process mismatch** – In absence of an in-depth knowledge of the process you’re automating, you run the risk of creating something radically different – thus, marring the prospects of adoption and successful output.

- **Taking the data issues lightly** – If the data capture and processing points are not factored properly in the implementation strategy, you may end up with the loss of valuable data.

- **Biting more than you can chew** – Getting excited and adding unrequired features in your SFA solution will not just cost you your bucks but the bloated platform will also be a source of confusion for your users.
Sales Force Automation is a necessity for industry players who want to stay relevant and profitable in these dynamic times.

So, equipped with all the answers to the ‘Hows and Whys’, are you ready to take the plunge now?

If you’re looking for a more detailed understanding of Sales Force Automation landscape or want to connect with an expert to get advice on which solution will best match your needs, please reach out to our sales experts.
For more sales insights, visit
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