CRM Expert Advisor White Paper

4 steps to monitoring team performance to accelerate sales and improve customer satisfaction

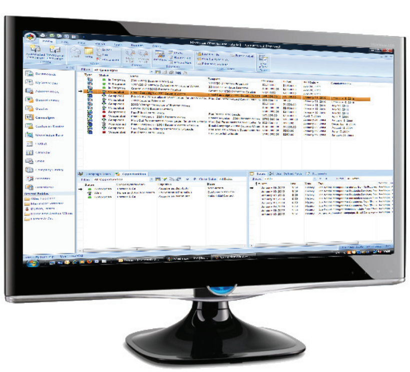
As a strategic business initiative, customer relationship management (CRM) software is designed to help companies accelerate sales while enabling staff to keep every customer satisfied. But your software is only as good as your business processes, and your processes are only good if employees are adhering to them.

So monitoring your team's performance and tactical execution becomes critical - not only to the success of a CRM implementation – but to the growth and success of your business.

In this report, you will find four key steps to monitoring your sales and customer service teams in order to ensure they are on a path to success.

Step 1: Set goals, processes, and performance guidelines

The first step in monitoring team performance is to determine exactly what you are monitoring. To establish this, you have to go back to what your goals are, and what processes and tactics you are implementing in order to achieve those goals.



Example: Sales

If your objective is to utilise CRM software and processes to help increase sales, your end goal may be to increase sales by 25% this year. But achieving this requires setting up smaller, daily/weekly/monthly objectives, processes and tactics for sales staff to implement on every lead and deal they're working on. So the key tactics and performance guidelines you may implement to achieve your sales goals may look something like this:

- Follow-up on all leads within 24 hours
- Make at least five attempts to reach each lead
- Qualify all leads with 10 standard questions to determine needs
- Utilise proven, step-by-step sales methodology for all qualified leads, to ensure a higher win ratio.

The exact tactics and numbers you use may be different, but the purpose here is to set up specific expectations for staff that makes achieving goals tangible and manageable.

Example: Customer service and satisfaction

On the other hand (or at the same time), your goal in utilising CRM software and processes may be to help improve customer satisfaction in order to increase repeat business. For customer service staff, their performance in helping to achieve these corporate objectives can be boiled down to key daily guidelines for handling customers. The key performance guidelines to achieve this may be:

- Resolve 80% of issues on the first call
- Resolve key account issues within 24 hours
- Resolve all other issues within 48 hours.

With these types of clearly-defined processes and performance expectations in place, the first step is complete in monitoring your team's productivity and performance in these areas.

> "The software just makes it easy in a fast moving environment for everyone in the organisation to know what is going on and who is doing it"
>
> Graham Inskip, Managing Director, Graham Lloyd Ltd

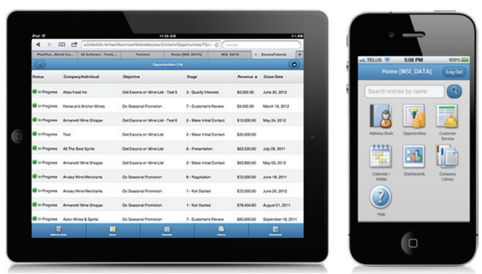
Step 2: Manage by exception

Once you have defined your business goals and processes related to CRM, the next step is to configure and implement the system to enable staff to easily follow the expected performance guidelines. Then train the staff to utilise the system.

Example: Sales

Using the sales example from Step 1, configuration of a CRM system to standardise on sales tactics involves:

- Access to leads: ensure your staff has an easy way to access new leads quickly, with all expected basic and pre-populated lead qualification data available at a glance.
- Lead follow-up and status: use phone call tracking per lead, with call and voicemail notes. Standardise on terminology and process to rate and/or update the status of leads.
- Lead qualification: configure lead qualification questions into fields, complete with multiple choice selections for values. Include questions to assess budget, prospects' authority level, and purchase timeline; as well as other specific questions to your business to determine their needs. For example, a field called "Decision Timeline" might have values for "30 days, 90 days, 6 months, and 12 months" (depending on your average sales cycle length). To make it easy for sales people, sort them in the order in which they would ask these questions during the lead qualification phase. In addition, have some of this data pre-populated by asking these questions in your web forms.
- Sales methodology: Set up your step-by-step standard sales process or methodologies in your CRM system to enable all sales people to follow the same sales steps for each qualified lead. Use the best practices that have helped win deals in the past. This may involve sending proposals and quotes, taking out prospects for dinner or golf, conducting demonstrations of your product, sending samples, etc. The system should be configured so that completion of one step will prompt the sales representative to move onto the next step, in the appropriate time frame.



Example: Customer service and satisfaction

To implement the customer service processes and performance guidelines outlined in the customer service and satisfaction example in Step 1, configuring the CRM system involves:

- Access to customer information & cases: ensure staff has access to an entire customer history including past communications and purchases. Also, establish a means for all staff to create customer service case tickets in the system, logging all details of the complaint or service request.
- Case assignment and escalation: different people in your organisation probably have different areas of expertise and authorisation levels. In situations where one staff person can't answer a customer's question, make it easy for them to assign someone else to the issue. When the customer inquiry requires a refund, upgrade, or other situation that requires a manager's authorisation, make it easy for staff to escalate the situation to a manager.
- Knowledge and case resolution: for staff to resolve issues, they need access to critical information on your products and services. This includes technical details and how-to information. In addition, make internal policy information, such as returns and refunds, easily accessible for staff to verify.

Once your system is configured to enable these processes, you can monitor each step to ensure your performance guidelines are being followed. Managing by exception is a management style that expects staff to be performing to their guidelines, and only alerts managers when employees fail to meet these expectations. Employees are empowered to do their jobs. Managers get critical information on an as-needed basis, saving time for situations where attention or action is required.

To manage by exception, configure your CRM system to notify you when your performance guidelines are not met. Using the sales example, receive an email alert when:

- New leads entered into the system (manually, through a web data import, or other means) are not touched or updated within one day of entry (which may be defined as a call being placed to that lead or a lead status field being updated)
- After two weeks of a new lead being entered, the lead status is not qualified,

or updated to another value; and there are fewer than five phone notes entered for that lead
- A qualified lead doesn't have the ten qualifying questions completed in lead fields
- A qualified lead doesn't have a corresponding opportunity record created with a forecasted date and revenue amount
- An opportunity's methodology steps aren't being utilised within five days of the record being created.

These types of system alerts ensure that processes are being followed to expectations; not only for the sake of ensuring usage of the CRM system, but to ensure staff are following the processes you put in place to help achieve the company's goals.

Step 3: Look at the big picture

While Step 2 outlined ways to monitor the micro-level details of an individual's productivity and performance, Step 3 is about taking a step back to look at the big picture. If a sales or service employee is effectively following processes, the manager should not receive any alerts for that person. But even if a sales representative is following up on all leads within 24 hours, properly qualifying, and utilizing the right methodology – you still need to know if their sales pipeline and forecast are on track to reach the 25% increase in sales for the quarter or year. This lets you monitor overall performance, and ensure they are not just going through the motions and following the tactics. For this level of monitoring, you need to do more than just managing by exception – because it may be too late by the time you are notified that a team's forecast is not on track.

To ensure you and your team are on track to meet the higher-level objectives, you need to see a different set of metrics – whether through dashboards, chart reports, or more detailed reports. To make it easiest for managers, these metrics should be available on demand, or sent via email on a regularly scheduled basis, such as weekly or monthly.

Using the customer service example from above, dashboards and reports to help you see whether you are on track to improve customer satisfaction ratings, may include metrics such as:

- Customer service cases by staff
- Customer service cases by status
- # of cases overdue for resolution
- # of cases created on a daily basis.

Using visual gauges helps managers see the status of key metrics at a glance, in real-time. Drilling down to the details of the reports gives managers the information they need to properly coach and mentor staff to improve performance. After all, "an organisation's ability to learn, and translate that learning into action rapidly, is the ultimate competitive advantage."*

Step 4: Get real-time updates from the field

It's no secret that getting all of your staff to adhere to updating information and actions in a CRM system can be a challenge. It's often the most challenging with field sales staff that are not in close proximity to managers and colleagues on a daily basis. If they don't make regular updates, you have no way of monitoring their actions and performance, to determine whether they are on track to meet performance goals.

One solution to ensuring that sales staff makes updates, is to empower them to do it immediately after a call or meeting while the information is fresh in their memory. This allows the sales team to work more efficiently, eliminating the need to type up sales call reports and make updates to customer records, sales opportunities, or forecast status several days after a customer visit. Managers receive updated, real-time information that is synchronised with performance guidelines.

Empowering staff to make real-time updates from the field includes updates on:

- Lead status and qualification
- Forecasted revenue, opportunity stage and dates
- Sales opportunity details such as budget, authorisation and competitors.

* Jack Welch, former Chairman & CEO, General Electric.

> "It is difficult to imagine how we would function without this invaluable tool to our business."
>
> Peter Hunt, Director, Multipix Imaging

Real-time updates also benefit sales staff and support colleagues by enabling immediate action on:

- Setting next appointments or follow-up calls
- Updating customer/prospect records with meeting notes and action items
- Staff collaboration, such as sending requests for proposal updates, samples, etc., to staff back at the office.

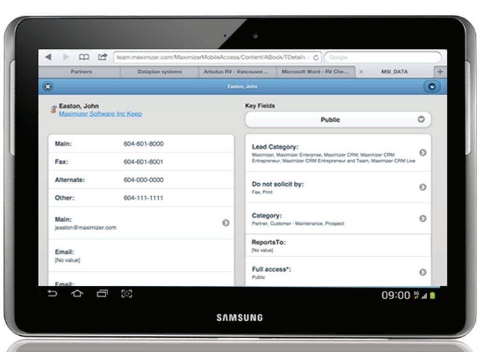
Real-time updates from the field – whether through mobile, synchronised, or web-based CRM applications – ensure that managers get current information for monitoring performance and make it easier for field sales staff to update information while it's still top of mind.

Next Steps

Every company, regardless of size, should monitor its team's actions, productivity and performance, to identify areas where resources are being effectively utilized and where they need to be adjusted for improvement.

Start by clearly defining and communicating the business goals, so employees understand how their daily actions are tied to the top or bottom line. Once team and individual goals have been defined and communicated, a CRM system plays a vital role in empowering staff, keeping them on track and monitoring their performance, throughout the process of achieving results that take your business to the next level.

To get started with monitoring your team's performance to ensure they're on track to meet corporate goals, the first step is to define your goals, processes and performance guidelines. Contact Maximizer Software and ask about CRM Planning services to help you get started on the right foot.



About Maximizer Software

Maximizer Software delivers Customer Relationship Management (CRM) software and professional services to meet the needs, budgets and access requirements of entrepreneurs, small and medium businesses and divisions of large enterprises.

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Technology Partners

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Maximizer CRM helps small and medium-sized businesses maximize their marketing, sales, customer satisfaction capabilities and enhance their productivity and efficiency through the optimisation of what resources they have.

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