Clearly Different. Clearly Better.

2017 C2CRM Sales Benefits

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Improve **Account Management**

1. **Better Analyze Accounts.** C2CRM helps companies better analyze accounts by storing demographic as well as financial information on accounts. This makes it easier for sales representatives to check the background on a prospect before making the decision to call on them. Additionally, you can map the organizational structure. By analyzing accounts, you can prioritize your prospects. This helps improve your sales win rate and lead generation.

2. **Access a customer's buying history.** Accessing a customer's buying history helps you determine when they may reorder. It may also help you look for cross-selling opportunities. This increases the lead generation rate, win rate, and decreases the sales cycle time.

3. **Map the relationships within an account.** You can quickly determine the quality of relationships within an account using C2CRM. C2CRM helps you store information on all your contacts at an account and to profile them as well as your relationship to them. You can then chart this information to determine the level of penetration you've made within an account. This helps you improve your win rate.

4. **Place all account information in one centralized location.** C2CRM helps you attach all account-specific information to your accounts. This makes it easier to search for information associated with a specific account, such as old contracts, as well as old presentations. This makes you more effective in selling to these accounts, improving your win rate.

5. **Reduce time spent on administrative tasks.** By more fully automating a sales representative's activities, such as collateral fulfillment, forecasting, call reports, etc., you reduce the time sales representatives spend on these activities. They will thank you for this and spend the added time selling.

6. **Better prepare for calls.** Because sales representatives can find relevant sales call information more easily, they will tend to better prepare for calls. If they can find all information in one location, they will tend to use it. By maintaining all call history in one location, they will more easily pick up where they left off on the sales cycle and will be more apt to move the sale along.

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Improve Sales **Representatives' Effectiveness**

Improving sales effectiveness, compared to improving efficiency, means sales representatives will find them selves doing things that previously, they could not, or found difficult to do. When you improve their effectiveness you give them another set of tools with which to sell—tools which they did not have previously.

Your salespeople will sell differently and better when using C2CRM. They'll send more correspondence to customers and call them more often because they can quickly remember where they last were in the sales cycle. Because they can organize and prioritize their prospects, they'll prospect more often, because it's easier with C2CRM. They'll schedule more meetings at the customer site, because it's easier to do so with C2CRM. They'll work remotely more often and spend more time at the customer site, because C2CRM frees them to do so. C2CRM makes sales representatives more effective through these and the following benefits.

7. **Projects the image to the customer of a well-run business.** Compare the sales representative who walks into the customer site with manila folders of notes, who pages through loose-leaf paper to find information for the customer, and who organizes himself or herself poorly to the well-organized, C2CRM-enabled sales representative. Who projects a more professional image? C2CRM projects an image of a well-organized, disciplined, responsive organization to the customer. On image alone, companies sometimes justify an investment in C2CRM.

8. **Make fewer calls through doing more per call.** C2CRM allows sales representatives to answer questions in front of the customer that previously they may not have been able to answer. With C2CRM, sales representatives can bring their real time inventory status with them everywhere, product catalogs, pricing, configure orders, and much more. This allows them to answer more questions and do more per sales call. Not only can they do more per sales call, their responsiveness makes it more difficult for the less-responsive competition to win the order.

9. **Attach all relevant correspondence to accounts and opportunities.** Without an electronic means to do so, sales representatives have no way to associate notes with a specific account, opportunity, contact, date, and more all simultaneously. The relational database functionality permits this. Associating information to multiple entities helps tremendously with information retrieval and analysis. You can not do this without an electronic system without duplicating information and risking losing version control over that information.

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10. **Show sales professionals what has changed in their territories.** C2CRM notifies sales professionals when something significant has changed within their territories. This could include new opportunities, new contacts, accounts, news stories and more. This allows them to react faster to changing events and opportunities than their competition.

Improve **Forecasting**

11. **More accurate forecasts.** Because forecast data resides in only one field in a database, you reduce errors from double-counting information and from manually rolling up forecasts in spreadsheets. Forecasting with C2CRM simplifies this difficult process. With an underlying database, you also store forecast history, which you can use to adjust current forecasts. Accurate forecasts benefit companies in numerous ways. They help notify management of changing market conditions so they can adjust production, hiring, and other capacity-related decisions. Many companies justify the investment in C2CRM based on improved forecast accuracy alone.

Increase **Customer Retention**

Studies show that companies expend more resources in convincing a customer to spend the first dollar with them than they do in convincing the customer to spend ensuing dollars. As the relationship develops, each marginal dollar the customer spends with the company costs less for the supplier to gain. Losing a loyal customer to the competition hurts. Not the least because the competition can point to this instance as an example of why it pays to switch to them.

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12. **Develop a learning relationship with customers.** C2CRM helps you develop a learning relationship with your customers. Customers expend resources in specifying what they want, in giving you their time to learn their business, and in jointly solving problems together with you. If you treat this information with little respect, lose it, misplace it, or do not capitalize on it, you risk losing this customer. Competitor's who store this information, catalog, and use it to predict what will help the customer can out-hustle you. This information defines your relationship to the customer. Your use of this information reflects your professionalism and level of respect for your customers' resources in specifying this information to you. Customers lose their patience quickly if they must specify information multiple times, including information as standard as their address, customer number, ship to address, and more.

13. **Better follow through on commitments to customers.** Customers will ask for help multiple times in their relationship with you. If you store this information in a loose-leaf notebook and try to fulfill requests through phone calls and meetings, you increase the time spent tracking and following through on these requests and risk not fulfilling individual requests. Whereas, if you store this information electronically, you can more easily share it with others who can refer to it in helping you fulfill the customer request. You can further catalog these requests and analyze them to look for trends and root causes of questions, so you can better preempt them in the future.

14. **Respond faster to customer requests for information.** The faster you turn around a customer request, the more you will satisfy your customers. C2CRM helps you do this, especially with more complex requests through workflow and storing this information on a central server.

15. **Allow you to better maintain regular contact with customers.** C2CRM includes a tickler system to remind you when to "touch" your customers. The more reliable and frequent the touches, the more your chances increase in retaining the customer. Customers appreciate suppliers who appear available rather than having to feel like they are imposing in requesting help from suppliers. They will reward you with more business the more frequently you contact them.

16. **More easily check on order, billing, and other status for customers.** C2CRM offers access to order entry, billing, and other back-end systems. With this access you can turn around questions on the status of orders, billing, and other information more quickly and respond more accurately. This helps improve customer retention.

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17. **More easily generate thank you letters.** Because C2CRM stores customer address and title information and standard letter templates, you can speed this mundane task and generate thank you letters and follow up letters more easily with C2CRM than without one. Also, C2CRM makes it easier for centralized operations to fulfill your requests to print and mail correspondence. All of these conveniences make sales representatives more apt to correspond with customers.

Improve **Opportunity Management**

18. **Enable cross-selling.** SFA experts define the term “cross-selling” to describe the tactic of selling products complementary to the product of initial interest to a customer. Cross-selling benefits both the customer and the supplier in offering a more complete solution to a customer need. C2CRM enables cross-selling through making opportunities visible to more product experts. These product experts can search C2CRM using standard queries to keep up to date on the latest opportunities.

19. **Allow salespeople to manage more prospects.** By better organizing salespeople, making information easier to retrieve, and putting all information in one location, salespeople using C2CRM can manage more prospects. Each new prospect they manage increases their chances of closing a sale.

20. **Better coordinate complex sales through team selling.** By placing information online and allowing for real-time updates, teams selling to multiple locations can better coordinate sales efforts. Telesales representatives better coordinate sales efforts with field sales representatives, and product experts better coordinate their efforts with relationship managers.

21. **More thorough follow-up of sales leads.** Marketing communications and telemarketing organizations frequently generate leads in large batches, following a trade show or campaign, for example. Sales representatives then choose the top perceived prospects to pursue and may ignore the rest. By placing these prospects in a structured lead management system, lead- generating organizations can check whether the field has followed up with new prospects and can step in to further qualify the prospects if field sales needs temporary help.

22. **Pass leads to the field more quickly and efficiently.** With C2CRM, prospecting teams can pass leads to the field much more quickly than without C2CRM. For example, marketing teams attending a trade show can enter prospect information immediately after speaking with prospects

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and send that information to the field seconds later. Fast follow-up presents a professional image to the customer and pre-empts the competition.

23. **Sales managers view the pipeline.** With C2CRM, sales managers can view whether the sales force needs more resources to help close deals, generate leads, or move prospects along the sales process. A lead management system gives them a complete view of the sales funnel from an aggregate level so they can apply resources at the sales bottleneck. This speeds the sales process.

24. **Better structure the sales process and lead management.** With C2CRM, you define the activities that should take place at each sales stage. By reporting the status of the sales cycle, C2CRM reminds the sales force of the activities they should take to close the deal.

25. **Automatically schedule activities based on sales stage.** C2CRM automatically prompts sales representatives to take specific actions based on the profile of the opportunity and the sales stage in which they work. These prompts can appear as scheduled activities on a calendar, an e-mail to the sales representative, or many other forms. This helps reduce the time sales representatives spend planning sales activities and keeps them focused on contacting the customer.

26. **Better analyze opportunities.** C2CRM can score opportunities based on their size, the competition, probability of winning and other characteristics. Scoring opportunities helps sales representatives prioritize them and maximizes their sales.

27. **Maintain a tickler file to follow up with prospects.** Many times a prospect will tell a sales person to contact them at some future time following a budgeting cycle or an important meeting. C2CRM makes it easy for salespeople to schedule the meeting and set an alarm to notify them when to take action. Also, prospects may ask for a periodic meeting, such as a weekly meeting, in which case, you could use C2CRM's recurring meeting function to schedule the meeting into the future.

28. **Keep all opportunity information in one central location.** A sales representative can maintain all opportunity information in one location, knowing where to find the information at all times. With a desktop scanner, they can scan paper-based notes and attach the information to opportunities. With voice recognition software, they can dictate notes. They can attach important e-mails, proposals, quotes, and presentations to opportunities. With all information in one location, they can refresh their memory quickly on opportunities and others can brief themselves quickly.

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29. **Decentralize decision-making.** C2CRM helps organizations better decentralize decision-making. Product configurators, for example, allow sales people to determine allowable configurations and price those immediately for customers. Pricing tools help them determine maximum discounts they can offer customers. Quote generators help them deliver quotes to customers faster. All these tools and more help maintain momentum with customers, making it easier for them to do business with you.

30. **Reduce the order entry cycle time.** Some paper-intensive order entry processes can take weeks to fulfill orders. Long order entry times increase the time to fulfill customer orders and increase customer dissatisfaction. C2CRM uses workflow and can be integrated with order entry systems to help speed the order process and increase customer satisfaction.

31. **Respond faster than the competition to customer requests.** A product consists of not only the core product, but also the service that the customer perceives. To improve the value of your product, C2CRM helps you improve the service you offer with that product.

32. **Reorganize the sales force.** Changes in the marketplace, turnover, company growth, acquisitions, and other dynamic events prompt sales organizations to reorganize sales territories. The more quickly and fairly you do this, the faster the sales force concentrates on selling and not on maneuvering for the best territory. C2CRM scores territories, and allows sales managers to divide them equally per zip code, industry vertical, or most other criteria.

33. **Automate the process of getting approvals on discounts and configurations.** For more complex configurations or more aggressive discounts, sales representatives must gain approvals from more senior executives. C2CRM can route requests for approval to the appropriate levels based on the attributes of a request. By tracking requests, sales representatives can speed approvals.

34. **Automatically route leads to speed lead follow-up.** Rather than ask someone to determine where to route leads, C2CRM system administrators can set up the system to route leads based on criteria such as size of company, number of employees, location, industry, and other criteria. Automatic lead routing speeds the lead follow-up process, increases the win rate and shortens sales cycle times.

35. **Better manage multiple sales channels.** C2CRM helps companies better manage the process of routing leads to the appropriate reseller, partner, or sales organization. In addition, by giving partner's access to C2CRM via a self-service portal, partners and resellers can access the latest product

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pricing, availability, and configurations. C2CRM also helps companies maintain more accurate histories of opportunities and minimize arguments over who “owns” an opportunity.

36. **Better manage their calendars.** C2CRM includes calendar management. Sales representatives carrying their calendars in their laptops or mobile devices synchronized to C2CRM can respond faster to customer requests for a meeting than if they did not have these tools.

37. **Sort information to prioritize it.** Because C2CRM stores information in an organized relational format, sales representatives can sort all their information by priority. For example, they can sort all their high priority activities, their most promising opportunities, their high priority accounts, and more. Prioritizing this information helps them act more quickly and gain the initiative over the competition.

38. **Check inventory status.** C2CRM integrated with back end systems helps sales representatives give customers immediate status on the inventory of products so they can commit to delivery dates. This makes it easier for customers to do business with your company.

39. **Faster turnaround of letters and literature fulfillment.** Fulfilling literature requests and writing letters is arguably the least enjoyable part of sales. C2CRM automates these processes and eliminates the drudgery of these oft-delayed tasks. Sales representatives benefit from a more automated fulfillment system, and the customer receives their requested information faster.

40. **More quickly generate proposals.** C2CRM automatically generates professional-looking proposals from word processing templates, quotes, and stored customer information. Sales representatives can generate these complex documents with the press of a button.

41. **Prepare for calls more quickly.** Opportunities to present to customers sometimes occur with little notice. Having all information in one location allows sales teams to respond more quickly to customer requests for briefings when these opportunities arise.

Reduce Sales, General, and Administrative Expenses

42. **Enable sales representatives to work remotely.** C2CRM helps sales representatives work away from the office. By carrying everything they need with them, they have no reason to visit the office. This reduces the need for administrators, office space, utilities, and other expenses. Sales

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representatives can work from home, reducing the time spent commuting, thereby increasing their selling time. Additionally, they can communicate with the company's computer systems while at the customer site through remote dial-up.

43. **More accurate quotes.** Inaccurate quotes cause rework and increase the need for contract administrators. C2CRM increases quote accuracy and reduces the need for administrators.

44. **Reduced training costs.** Much training focuses on policies, procedures, and sales processes. C2CRM has embedded selling methodologies, pricing, quoting, configuration systems, and more to guide the sales representatives through unfamiliar processes. This reduces the time they must spend in the classroom for training.

45. **Centralized collateral fulfillment.** Remote offices have operations redundant with other remote offices. Centralizing functions such as literature fulfillment reduces costs. C2CRM enables centralizing administrative functions by ensuring all sales representatives standardize on how they request literature fulfillment and other services.

46. **Easier to make changes and updates to customer information.** Before C2CRM, if a customer changed addresses, a customer point of contact changed, or they changed their organizational structure, administrators would have to find each occurrence of this information and make the change. With C2CRM, you store the information in one location. With one update, you make the change throughout the system.

Improve **Sales Management**

Sales managers who effectively use C2CRM will outperform those that do not. One sales manager uses C2CRM to have fact-based discussions with his sales team. He does not require them to enter information into the system. Rather, they do it, because he uses the system to review their accounts and to give them coaching. By recommending steps for them to take with their customer based on what's in the system, he sends a clear signal to them that he relies on the system to track their opportunities. He can check their activity levels, average sales cycles, number of leads they pursue, win rates, and more. By managing using facts, he shows his representatives he is on top of their opportunities. Furthermore, the VP of sales regards him as the top sales manager, because he can give a fact-based representation of his sales territory.

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47. **Better determine various metrics to give more objective feedback to sales representatives and improve coaching.** Having objective facts to back up your claims as a sales manager makes a much more compelling case than guessing these metrics. For example, telling a sales representative that their average sales cycle time is six months versus an average of three months for other sales representatives on your team makes a sales representative more receptive to your recommendations. If you use estimations for important sales metrics, representatives will not receive your message as well. SFA metrics include:

    - Average sales size
    - Win rate
    - Sales cycle length
    - Opportunities pursued

    Your company may measure sales representatives by profit and customer satisfaction measurements in addition to revenues. To fairly evaluate sales representatives on these criteria, they must feel they have control over them. To give them control, they need tools to accurately measure them. C2CRM can help give sales representatives more control over their accounts by giving them the information they need to control them.

48. **Define and rearrange sales territories more easily.** C2CRM captures demographics on companies such as revenues, number of employees, and others that help you size the opportunity at each account. This information plus the location of the company along with it's SIC code can help you more fairly divide sales territories. Additionally, with turnover, promotions, and other changes to the sales territories, you need the ability to realign sales territories quickly. C2CRM helps you manage these reorganizations better than more manual means.

49. **Better enforce policies, such as discounts.** C2CRM can prevent sales representatives from violating company policies, such as pricing rules. You can build these rules right into your quoting modules so sales representatives cannot make these decisions without the proper approvals.

50. **Easier to compile statistics on sales activity.** With sales representatives recording their activities using C2CRM, you can better oversee their sales efforts. With visibility into an exceptional and poorly performing sales representative's activities, you can better compare what activities one does versus the other to help improve the poorly performing representative's results.

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Reduce Sales **Representative Turnover**

Reducing sales representative turnover and speeding the turnover process helps to improve sales cycle time and win rates. We define the sales representative turnover ratio as the number of people leaving their territory versus the number of territories. Every turnover event costs a company, whether due to internal transfer or people leaving the company. Turnover causes:

- Increased administrative costs
- Loss of revenue
- Loss of market share
- Loss in customer service
- Loss in available management time

C2CRM can help increase cycle time and win rates by providing call history, order history, and profile information that allows interim coverage either in person or by telephone. When the company assigns an account to a new sales representative, having up-to-date information regarding the account will reduce their learning curve, and with proper interim coverage, the customer should not feel abandoned.

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51. **Reduce the administrative burden on sales representatives.** Sales representatives have a responsibility to management to report forecasts, their activities, their opportunities, and account information. Corporations need forecasts for capacity planning and to announce to external investors what to expect. They need the other information, because it has value to product development, sales managers, and other sales representatives. Choosing not to collect this information reduces the effectiveness of the corporation. Whereas, sales representatives view the choice to collect it as an imposition on them. C2CRM better automates this data collection, minimizing the burden on sales representatives. By minimizing the burden, you increase the sales representative's satisfaction and decrease the likelihood they will leave for a competitor, taking their accounts with them.

52. **Reduce turnover among sales representatives.** With the proper implementation of C2CRM, your sales force will appreciate the investment you are making in them. C2CRM helps salespeople cover more territory and work more efficiently. Turnovers cost companies in lost intellectual capital, lost efficiency while waiting for the new sales representative to become productive, and lost morale among the rest of the rest of the sales force. Sales force defections can become contagious, especially if your best people are leaving. C2CRM helps to encourage them to stay. And if they leave, you still have the knowledge they've gained to allow for faster turnover with the new sales representative.

53. **Make sales representative transitions easier.** Without C2CRM, a sales representative new to a territory must rely on a thorough turnover from an outgoing sales representative. In most cases, the sales representative left on bad terms, and therefore has little incentive to do a thorough turnover. If sales representatives know when they walk out the door to work for a competitor that they can take their accounts and account knowledge with them, they will be more apt to leave. Recording account and opportunity information in C2CRM helps the representative new to a territory learn the accounts much faster. Additionally, sales representatives new to the company find the transition easier when having all of the important sales information online.

54. **Place new sales people into the field with less training.** With the support of C2CRM, new sales representatives can begin selling earlier than they could without C2CRM. C2CRM guides them on pricing decisions, competitor information, product information, account and opportunity information, and much more. This increases revenues for the company and reduces SG&A cost.

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“Driving the Customer-Centric Revolution,
One Business at a Time.”

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