



Inviso Consulting Group  
Sales Process Effectiveness



**Armed with timely sales information, your sales leaders have the insight they need to strategize more effectively and improve overall business performance.** At Inviso, our consultants are ready to lend their extensive experience to design and execute a sales operation process unique to your business.

**Business Planning**

- Sales Organization Design
- Customer Segmentation

**Business Management**

- Pipeline
- Forecasting
- Performance Management
- Business Review

**Customer and Opportunity Management**

- Customer Relationship Management
- Account Planning
- Customer Satisfaction Tracking
- Solution Selling

**Sales Communities**

- Training/Readiness
- Communications

**Weak opportunity capture in CRM**

**Drive adoption**

**Corporate Challenge**

A large digital advertising sales team was substantially expanded when several companies were acquired. Numerous systems and practices for capturing sales information were in place, while use of the original system by the existing team was anemic – less than 40% of all opportunities were estimated to be captured in the system.

Inviso's charter was to drive implementation and adoption of the CRM system (built on Dynamics CRM) across the specialist sales teams. The project included migrating data and users from several disparate systems onto one system; establishing consistent pipeline and forecasting processes across the teams; and driving adoption by the users.

**3 legged stool:  
support, incentives  
and reporting**

**Define key metrics**

**Utilize incentive  
compensation**

**Identify key  
constituents**

**Meaningful reports  
Establish a rhythm**

**Eliminate spreadsheet  
pipeline systems**

**Design appropriate  
training**

**Create advocacy group**

**Personal touch**

**User responsive system**

**Expose non-users**

**Benchmark  
performance**

**Results: dramatically  
increased adoption**

## Solution

Driving CRM adoption is easy: pay commissions only on opportunities entered in the system. Unfortunately, the company's incentive structure would not allow for such a draconian approach. ICG instead drove CRM adoption by creating a 3-legged stool of support, incentives and reporting for end users.

### The 3 legs of support consisted of:

- **Executive Support:** Inviso worked with executive management to define key metrics they wanted to see, then defined system and process changes to produce those metrics. In addition, Inviso convinced executive management to tie some incentive compensation to system use, as measured by forecast accuracy.
- **Frontline Sales Management Support:** District managers became the key constituency for adoption, for two reasons: 1) they could influence end user behavior the most, and 2) they were users who needed to adopt the system, as well – in particular, the reporting. As a result, Inviso worked with the frontline managers to define and produce meaningful pipeline management and forecast reports, and to establish a rhythm for using those reports with their teams and with individual team members. Inviso was able to convince these frontline managers to “set fire” to their spreadsheet- and whiteboard-based pipeline systems, which then forced them to drive their users to enter opportunities in the system.
- **End Users:** Support for end users took many forms:
  - **Training** – Previous approaches included multi-hour, instructor-led training sessions. Inviso worked with the Readiness team to shorten training time; orient training to activities by role; and produce automated training for specific functions. Inviso also managed the load of up-to-date sales data in advance of training, making the users' initial interaction with the system more meaningful and less onerous.
  - **Champs Team** – a team of users was created to be a sounding board conduit for information about the CRM system.
  - **Personal Interaction** – Inviso personally reached out to several users to step them through different functions in the system.
  - **System Updates** – By working closely with users and management, Inviso was able to represent the user community to the CRM development team, and drove several system changes – from small “tweaks” to custom functions – that made the system more usable and effective.

The incentive compensation and support functions were “the carrot” for end users to use the system. “The stick” included the exposure that came in the updated “rhythm of business meetings”, which were fueled largely by information coming out of the CRM system. In addition to public and private “call outs” of individuals and teams, many reports included comparisons of performance across teams and individuals, which also increased adoption.

The impact of these measures included driving adoption across the teams to more than 90%. In addition to more insight for improving sales performance, greater adoption by the CRM system to more accurate forecasts, better insight for the product teams as to what was working in the market place, and better inventory control and pricing.