
MAKING A DIFFERENCE

HOW TO USE A CRM SYSTEM TO
IMPROVE A STRUGGLING SALES TEAM



IF YOUR SALES TEAM IS STRUGGLING AT THE MOMENT, A CRM SYSTEM LIKE BUDDYCRM COULD HELP. BEYOND OTHER SALES PERFORMANCE FACTORS LIKE PERSONNEL, BONUS STRUCTURES AND SALES TARGETS, WHAT CAN IMPLEMENTING AND EMBEDDING A CRM SYSTEM INTO YOUR BUSINESS DO?

HERE'S A FEW WAYS TO INCREASE SALES PERFORMANCE THROUGH IMPLEMENTING A FULLY INTEGRATED AND WORKING CRM SYSTEM.

These are just a few ways that a CRM system can help with the performance of your sales team. You'll need your entire team to buy into the approach of using a CRM but the benefits are obvious and beneficial to all once in place. Our customers have experienced sales growth of 30%+ year on year after adopting BuddyCRM into their workplace.





TARGETING

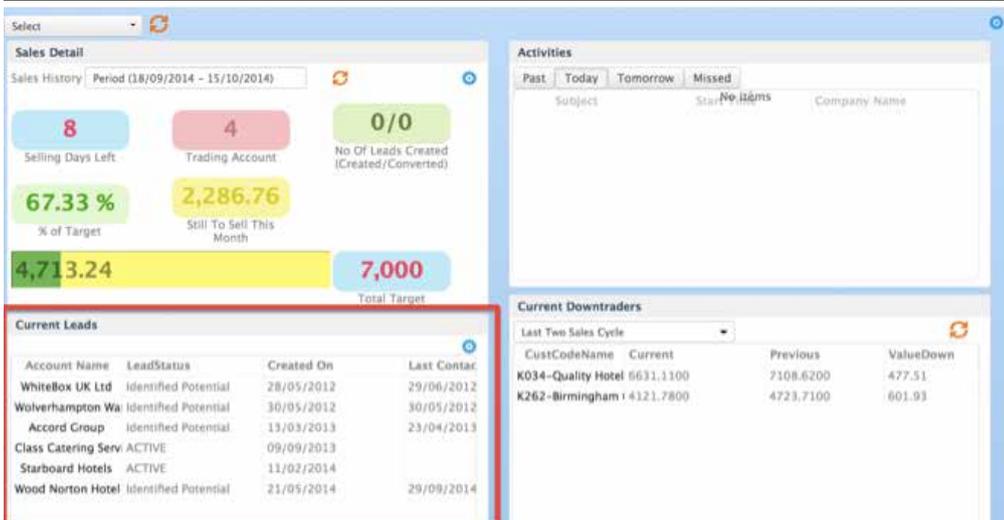
Current sales management thinking suggests that when sales teams are struggling to complete their calls / appointments they should be put on a 'sales diet'. ie. fewer calls or stacks of leads to plough through.

The idea is that with fewer cold call leads, sales people will put more energy into those prospects and have less fear of the giant stack of potential negative responses. They'll gain confidence and experience less burnout from an overload of pitch responses. BuddyCRM can help with the 'sales diet' approach by filtering leads into categories.

For example, you could filter your least active clients by sales volume and target those first.



BUDDY EXAMPLE



The screenshot displays the BuddyCRM interface with the following sections:

- Sales Detail:** Shows sales history for the period 18/09/2014 - 15/10/2014. Key metrics include 8 Selling Days Left, 4 Trading Accounts, 0/0 No Of Leads Created (Created/Converted), 67.33% % of Target, 2,286.76 Still To Sell This Month, and a Total Target of 7,000.
- Activities:** A table with columns for Subject, Start Time, and Company Name. It currently shows 'No items'.
- Current Downtraders:** A table showing the last two sales cycles for various accounts. The table is as follows:

Last Two Sales Cycle			
CustCodeName	Current	Previous	ValueDown
K034-Quality Hotel	6631.1100	7108.6200	477.51
K262-Birmingham	4121.7800	4723.7100	601.93

- Current Leads:** A table listing current leads with columns for Account Name, LeadStatus, Created On, and Last Contacted. The table is as follows:

Account Name	LeadStatus	Created On	Last Contacted
WhiteBox UK Ltd	Identified Potential	28/05/2012	29/06/2012
Wolverhampton Wa	Identified Potential	30/05/2012	30/05/2012
Accord Group	Identified Potential	15/03/2013	23/04/2013
Class Catering Servi	ACTIVE	09/09/2013	
Starboard Hotels	ACTIVE	11/02/2014	
Wood Norton Hotel	Identified Potential	21/05/2014	29/09/2014



BEST PRACTICE

With BuddyCRM, you can compare the results of all your sales staff easily and quickly by using the reporting system to analyse sales over different periods, regions or against any measure held in your database. Comparing under performers to top performers can highlight what techniques your best performing sales members are using to win sales.

While each team member may have a different approach to their sales, it's their overall sales figures which we need to look at here. Bob may make 100 calls to reach his sales target, while Sarah may make 30 calls to reach hers. They both make target so is there anything wrong with either approach? Probably not. But for those team members lagging significantly behind in overall sales, what key activities are your best performing sales team members doing that will most likely lead to a sale. Can we measure those activities and share them with the whole team?

For example in the screenshot below we can see Sales Team 6 consists of five members. Bob leads the way with 54 completed sales (won opportunities) in Quarter 4 of 2014, while Peter and Emily trail the team's sales with just 6 between them (Iain is a recent hire at the end of the

Quarter). Digging deeper into Bob's sales techniques by using the Management function, we would see that Bob is making more successful phone calls than anyone else – he is both persisting for longer and having less wasted time on voicemails. He clearly has cleaned and researched his buyer's contact details better.

Furthermore, he'd used BuddyCRM's filters to find prospects that had fallen off the buying cycle and sent them a 'Please try us again' email with a 15% discount voucher. Additionally Bob had called those lapsed/downtrading customers and discovered that they had moved their buying to another supplier. Bob asked to be put back on the tender list and agreed with sales management better terms for those particular prospects. These best practice ideas can be shared with the team at the next sales meeting and Bob can assist others with their sales targets. This best practice idea creates a mentoring approach for the best sales team members. While sales targets and bonuses often reward the top dog, unless all sales team members are contributing to performance, morale and overall company results will fall. Implementing best practice throughout the team will improve overall results.



	Quotes Created	Accounts Created	Ext. Leads Converted to Leads	Opportunities Created	Lead Converted To Accs	Leads Created	Opportunities Won	Opportunities Closed
Lewis Panton	0	21	0	12	9	9	12	15
Emily Jones	0	0	0	1	0	0	2	2
Peter Smith	0	1	0	14	0	0	4	5
Iain Cann	0	0	0	0	0	0	0	0
Bob Moore	0	14	0	65	7	8	54	61
sarah McNair	0	20	0	55	8	14	27	38



Storing your sales data in one centralised system like BuddyCRM means that you can make more accurate forecasting and planning for the next month, quarter or year.

Real sales data will always trump guesses about what happened last year at the same time and therefore lets sales team managers set better, more accurate and achievable sales targets.

You can share this historical information with sales team members too, helping them to understand that sales figures are achievable and managing the chance of unrealistic and demotivating targets.

Sales Charts



Sales Gross Margin Gross Profit





UNDERSTANDING TIME MANAGEMENT

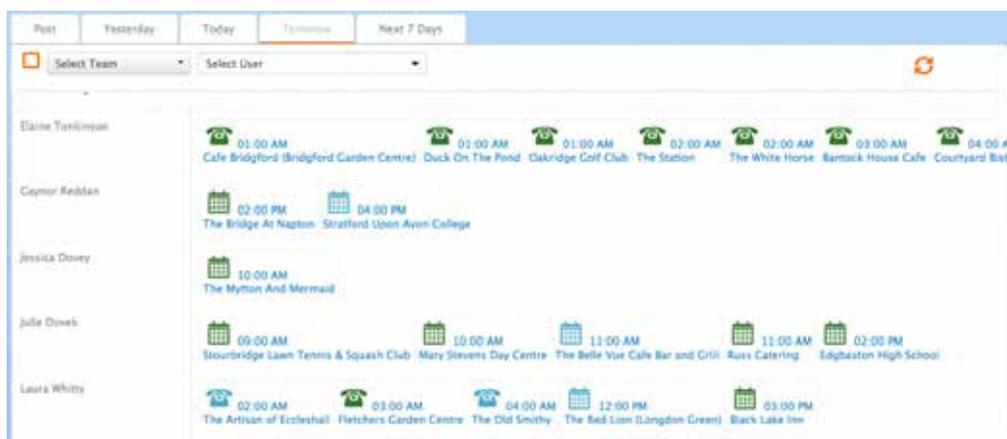
With a CRM in place, your sales reps should log their daily activities so you can track how many calls they make, how many meetings they book and how many demos they give.

BuddyCRM tracks all activity with a client and stores it safely in the cloud where sales managers have access to it in their sales activity reports. By tracking activities, the sales manager can see if any members are falling behind and encourage them to increase their points of contact.

It's a simple thing but if your team aren't talking to your clients, they're unlikely to be making sales....



BUDDY EXAMPLE





REDUCING UNQUALIFIED LEADS

With a CRM in place, your sales team should never be working 'blind' in their approach. With all contact information stored in one place, including emails, phone calls, marketing emails, and sales activity you'll be able to build up a pretty good picture of the contact before you pick up the phone.

Even a new member in the team will be able to take over a sales territory and see all the activity that had taken place with the companies in it previously.

There are many articles on our blog about methods for keeping your contact records up to date. These methods will also ensure that your leads aren't entirely cold ones and you know a little bit about the prospect before you approach them.



MORE BUDDY INFORMATION: WWW.BUDDYCRM.COM

