Sales Enablement Implementation & Case Study: Achieving Your Sales Knowledge Advantage

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PART 1: ARM YOUR SALES FORCE WITH ACCESS TO INFORMATION

In today's economy, customers are willing to sacrifice a "perfect fit" for something that is "good enough" to meet their needs, since in most instances there are multiple options available that will deliver their minimum requirements. Your corporate messages are what will differentiate you from your competitors and demonstrate why your product is the best fit for your customer. But too many times, your sellers only know how to talk about your product and company, they don't know how to converse about the business and customer needs; yet this type of conversation needs to happen with the first handshake or they may not get a second chance. Respondents of the CSO Insights' Survey[7] validate this when they confirmed the reasons they are winning deals is based on relationships (55%) as opposed to product superiority (41%). Unfortunately, only 7% felt that the marketing messages contributed at all.

Wikipedia defines Sales Enablement as, "The process of arming your sales force with access to insight, experts, and information that will ultimately increase revenue. Others have explained it as, "a set of sales and marketing activities designed to save sales organizations time by finding information more quickly, add more value to preset messages by creating and delivering more relevant content on-demand, and providing quick access to key experts across the company."

In some instances, it is used interchangeably with Sales Effectiveness and Sales Readiness, but these usually focus more on the collective set of sales tools and less on the organization's role in this process or the content experience. Other companies have sales and marketing roles entitled "Sales Enablement", but this is typically field marketing support that is involved in the interaction between sellers and customers.

CONNECT THE DOTS BETWEEN MARKETING AND SALES

I like to describe Sales Enablement as the catalyst that will connect the dots between marketing and sales, thus enabling a company to work smarter, reduce the risk of misinformation, and achieve a sales knowledge advantage. This is accomplished by adding more value and quality to customer interactions though better communication, sales collaboration and access to relevant messaging. According to IDC, sales productivity will improve by $260K per rep per year through better teamwork and a cohesive focus by both sales and marketing on enablement[2]. It's not a leap to agree that increased communication, productivity, effectiveness and performance in your sales organization will result in higher close rates, reduced operational costs and ultimately, increased revenue.

OPTIMIZE YOUR SALES FORCE

However you define it, Sales Enablement will ultimately make your organization become more efficient. Knowing how to converse with a customer in context to their business will give your sellers a sales knowledge advantage over your competitors… that is what Sales Enablement is all about.

How does your company plan to optimize your sales force in 2010? This activity seems to be almost a yearly ritual for many companies. Over 1,800 CSO Insights' Survey respondents listed their "13 Top Initiatives to Improve Sales Performance in 2009", and these items were almost identical to the 2008 list. How do you plan to achieve your list? A traditional tactical implementation would be to have all of these being led and managed in different ways by different leaders and teams. One Sales Enablement initiative would address half of your initiatives and bring them together in a more cohesive, seamless and cost effective way. Of this action items listed, six fall under the realm of a good Sales Enablement strategy, including: #2: Improving rep access to knowledge to sell effectively (31.8%); #3: More closely aligning sales and Marketing (30.8%), and #5: Enhancing sales team communications (28.7%).

PART 2: HOW TO GAIN A "KNOWLEDGE ADVANTAGE"

Typically, the 30,000 ft. corporate messages (I refer to this as "corporate knowledge") are mostly preset and intended for mass distribution, delivering "one voice" consistency for your audience. How your sales force takes these and converts them into customer value during the handshake (3 ft level) is traditionally left up to your sellers to figure out.

ACCESS TO KNOWLEDGE IS KEY TO SUCCESS

We are seeing the top analyst firms confirming that access to knowledge is key to sales force success. But what type of knowledge should your sales force have, and how do they get to it? For sellers, this would mean that you are giving them what they need quickly (company offerings, RFQ, supply chain, etc.) and matching it to customer requirements (delivery expectations, interoperability, price, etc.). But how much value are you really delivering if:

- Your corporate messages go unread and unused − therefore never making it to the customers through your sellers;
- Your people never really adopt the new technology − they continue to bypass it and rely on their old methods;
- Your content is not presented to sales in a way that they prefer to learn − they need it now, presented for a specific purpose (situational learning): they won't attend something they get today intended for next week, next month, or next year;
- Your content is not presented to sales in context to how they need to use it − many information portals were designed by IT with tool owners not by the folks that need to use it, and usually replace what was there before without any further understanding of end user needs; Another popular scenario is to develop the tools to deliver content aligned by internal organizational structure and not in context to the offerings or to the sales process.
- Your CMS and CRM tools don't match collateral delivery process or the sales cycle − they are typically just a pipeline data dump and do not put offerings into context with each other or customer needs;
- Your tools that should build momentum and simplify the buying cycle too often impede it − too many times each tool is developed in a vacuum and simple steps are not taken to align basic components, such as taxonomy, search styles and even offering names;
- Your sales and marketing folks do not respect each other − there is no recognition of the challenges faced or activities accomplished by each group and no attempt is made to bring the two teams together in a positive and meaningful way;
- You just fire off an email to Marketing and tell them to clean up the content and check the box on your list as having initiated Sales Enablement (and wow, look how much money I just saved the company!) − this approach does not connect networks of people or pool contextual knowledge together with sellers.

THE STATE OF KNOWING

Sellers need to prepare for their "pitch" to the customer, put together the proposal, close the deal and follow the delivery of the contract. Typically, sellers need to understand and know:

- Company information: General (history, industry standing, profiles of the executives, customer base, industry base, news releases, industry standings, thought leaders); offering details (configuration, technical specifications, bundling options, legal requirements, country restrictions, compatibility, marketing collateral, new releases, roadmap, channel partners), contacts (subject matter experts, content owners, product owners, operations, technical support, product support, management), pricing (pricing support, negotiating, escalating, quotes); and delivery (inventory, supply chain, shipping, installation, customer satisfaction and trouble shooting)
- Competitor information (who is competing at the point of sale, competing products, pricing, and interoperability);
- Market information (political, economic & social climates, technology capability and restrictions, available infrastructure, and industry insights);
- Customer information (industry standings, buying history within your company, existing deals, buying cycles, current and past satisfaction level, purchasing systems and processes, stakeholders, and decision makers).

"Corporate knowledge" is preset in nature. In most medium to large organizations, each type of information is managed by different teams and mass distributed through online tools, in documents, on web sites and other online portals to a large audience. Most of it is impersonal and generic in nature and very few of the marketing teams that create it have ever supported a sales person or been in the field and interacted with a customer.

"Personal knowledge" lives inside the heads of your top sellers, top performers, sales engineers and other sales support staff within your company. It consists of intimate details and customer insights that have been gained through years of personal experience and interaction. This insight is usually kept close to the chest within designated teams and distributed in emails and IMs among and between small core groups or individuals. Some companies are starting to recognize the need to try and capture this knowledge as most of it walks out the door when an employee leaves. By turning social networking tools internally for collaboration (or implementing federated search engines that will crawl through emails and corporate messaging systems), companies can capture a good deal of this personal knowledge and leverage it in a variety of ways.

Joe Galvin, Vice President and Research Director from SiriusDecisions stated that the effectiveness of preset collateral (that is produced by marketing teams) diminishes in value after the first or second sales call. After that, it's the knowledge of the sales team that will be needed to close the deal[4]. This means that you must rely on your sellers to deliver those messages in a way that resonates with your customer. For most B2B interactions, it is that face to face engagement that will persuade the customer to take an action. Your sellers have to convert the company-centric messages into customer-centric value, which in most cases, can take several hours in preparation and reformatting time. IDC estimated that companies waste almost $11,000 per seller per year with unproductive activities like searching and reformatting[3]. Multiply that by every seller times every customer engagement, and there is a lot of opportunity to improve your processes and bottom line.

Your typical company-centric approach

To start to initiate a change, you need to first take a step back and look at how your company creates and distributes messages to your sales force and customers. You rely on your sellers to monitor and use all of the various distribution channels, read all of the documents and message platforms to understand your company (and monitor what the customer sees) and find the content they need to create their messaging. More importantly, you assume they know what to look for, where to look for it, how to find it and how to use it.

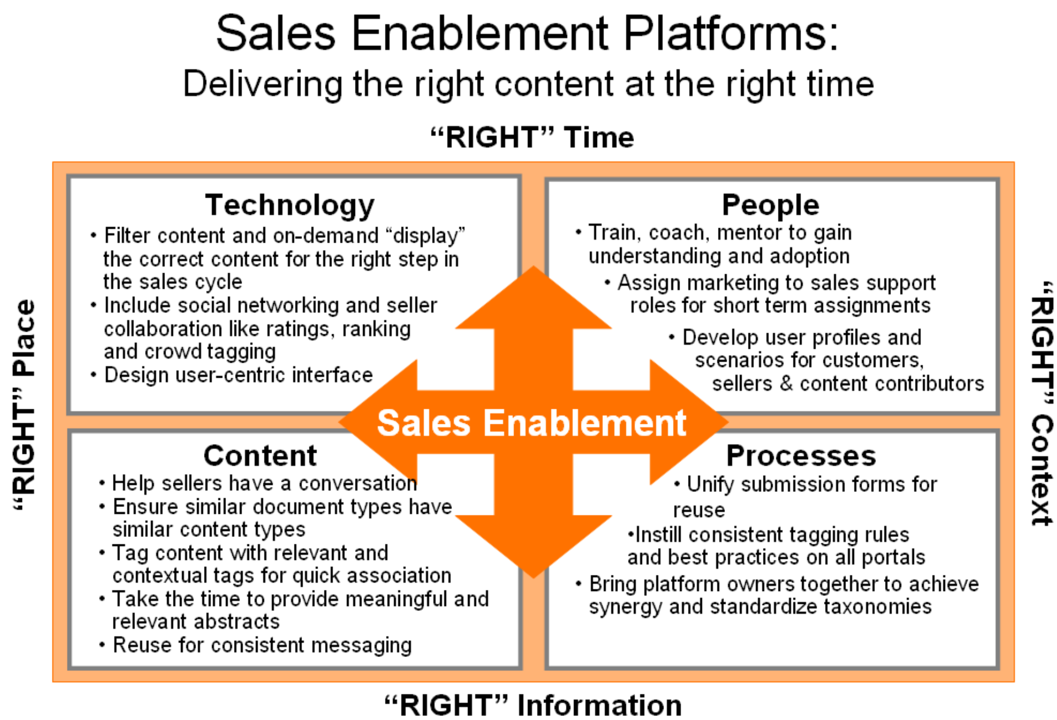
Many Corporate Marketing strategies dictate that one team creates company-centric content that **they** feel will prepare sales for the customer engagement and disseminate this through a variety of internal-only formats such as documents, presentations, videos, podcasts, emails, training sessions and web content over a wide range of vehicles such as intranets, sales portals, BI & CI, (Business Intelligence and Customer Intelligence) tools, Customer Relationship Management (CRM) tools and Content Management Systems (CMS). Another team creates different content they feel the customer, investors and analysts are looking for in the form of external documents, reports, presentations, advertising, press releases, campaigns, promotions, videos, podcasts, blogs, and annual reports, and distribute these messages over customer facing portals like their web sites, third party web sites, partner portals, print advertising, tradeshows and events. One of the biggest frustrations experienced by sellers is finding that fantastic nugget of information that they are sure will clench the deal, only to be told that information is for "internal" use only.

Garbage in - garbage out!

Typically, companies will try and "fix" perceived problems by implementing new technology with an, "if we build it they will use it" mentality. There are a few training sessions, a few communications, and there you go, now use it. Technology alone can't fix the underlying communication issues. It has been proven time and again that just throwing a new portal, or retrofitting another application won't have a meaningful impact if you don't take the time to ensure what is going into the tool is of value, and that people are actually using it.

If you are serious about making game-changing changes, and really want to get the most benefits from your effort (and it's not an easy task to be sure), your strategy must include these four components– otherwise, it will become yet another failed initiative and flash-in-the-pan experience.

- SKM technology – this is the cornerstone of a successful deployment as it will become the touch point for sales to the entire initiative. The ability to connect people and knowledge and put them into the right context is what differentiates this application from your CRM or CMS platform. Pick the right application (there are lots of vendors and options) to ensure it fits the unique aspects of your selling process;
- Content – If you don't clean up the content, then the only affect you will have is to frustrate your sellers by making them learn something new. A new portal won't update an old document, or add a missing presentation – garbage in, garbage out;
- Process – If you don't simply the processes, then you will be asking your publishing teams to take on additional responsibilities and won't fully address or avoid duplicate and redundant documents and portals;
- People – This is crucial if you want your company to internalize and adopt what you are changing. If you don't create understanding and awareness through training and communication, then your teams will continue to work in silos and be disconnected.



By making the commitment to address these four pieces, your organization will reap the benefit in many anticipated and measurable ways. To get a better understanding of the four parts, please read, "A Case for Sales Enablement" http://bit.ly/3yvZQD published June 10, 2009.

TURNING COMPANY SPIEL TO CUSTOMER VALUE

Ultimately, it is up to your sales force to find relevant content, digest it, interpret it, fill in any missing gaps and then adapt it to match their customer needs. While the topic of the actual content is not a subject of this discussion, there are several strategies you can implement to successfully help your teams convert your messaging from company spiel to customer value and deliver it more intuitively and efficiently.

One thing that can jump start your company is to install a Sales Knowledge Management (SKM) platform. Your better platforms use a mix of filtering, browsing and searching capabilities that accommodates the variety of "hunting and finding" methods used by your sellers and gives them access to corporate knowledge, personal knowledge and contacts in one place and in context to what they are trying to do.

You should also consider your content contributors and support teams and increase their understanding of the sales processes trough training and interaction. You can assign your new hire marketing staff to spend their first 3 months in direct support of your sales staff or give your existing marketers some short term assignments. This will expose them to the needs of sales and your customers, and will provide valuable insight into what they should be providing. Another choice is to combine your internal, external, sales, marketing and partner communications staff into one team and refocus the messages towards a customer-centric point of view. If you can't or don't want to make these types of changes, consider creating a sales enablement "tiger" team comprised of both sellers and marketers. Together, they can create tactics such as "lunch and learns", training and networking sessions to educate and integrate. This is the first step towards rebuilding lost trust through understanding and cooperation.

PART 3: SETTING THE STAGE FOR CHANGE

Please note that the company cited in this paper has had a corporate event that led to filing Chapter 11 bankruptcy. This project description and benefits depicted here are from the project inception in September 2006 until December 2008. While we were never able to attribute increased revenues to the Sales Enablement activities, we did realize enough reduction to our OPEX (operational expenses) to prove the benefits to other companies considering such an undertaking.

COMPANY SNAPSHOT: THE SUMMER OF '06

A global Telecom company decided to implement a Sales Enablement strategy mid 2006 as part of a larger business transformation initiative to reduce SG&A (Selling, General and Administrative expenses of an operating budget). At this time, the company had revenues of $11.28B, 31,550 employees, approximately 3,500 sellers, and 3,000 sales support staff. This initiative was sanctioned by two executive sponsors and the team consisted of a: Sales Enablement Director; Project Manager and Leader; Governance and Process Manager; and Content Manager who focused on content reuse, single sourcing, and auto-generation of critical sales collateral. In the last six months of the project, an IT liaison role was added as well. The Sales Knowledge Management (SKM) platform technology deployed was a traditional Enterprise onsite installation of BizSphere, developed by SVA-BizSphere AG in Wiesbaden, Germany.

The existing selling environment was:

- Every seller was expected to sell everything on the truck, which meant they could not possibly specialize in every product line as there were around 450 products, 30 solutions, and over 90 different professional services.
- Many of the enterprise products were sold through channel partners, of which there were hundreds; in addition, there were several Joint Venture partners for sales in parts of EMEA and Asia.
- Most sales were comprised of multiple products and/or services, so sellers needed to find information on multiple offerings for almost every customer engagement.
- There were potentially over 30 portals sales needed to interface with to conduct business, such as separate pricing tools for offerings and services, product information portals, services information portals, CRM tools, proposal generator tools, partner finding tools and compensation tools (just to name a few).
- Tactical competitive information was spread over 20 team sites mixed with team and offering specific information, and there was one very large repository of analyst documents housing both industry and competitive intelligence reports.
- It was reported that over 1.2 million files resided across the IT infrastructure system with no life-cycle governance in place.
- Over 6,000 preset documents and resource links were posted on the main company sales portal, broken out by internal functional teams. Each was pretty much a link farm (i.e. a web page comprised of links and short abstracts that took you to more pages of links and abstracts). A sales dashboard of quick links was added to over-lay the portal as an attempt to manage the massive amount of information. In reality, however, this added an additional layer of links. If you were lucky, you would eventually get to the actual content you were looking by the third or fourth click (if you could find it at all).

- The main sales portal could not display products and content by region and many postings and documents were duplicated to accommodate the regional perspectives.
- The preset documents were categorized using 185 different resource types, many of which were the same information just tagged differently by the content owners and teams.
- Web publishers were posting on average 145 new documents per month, and it took approximately two weeks for a document to go live on the site.

There was no document life cycle in place so preset collateral was only replaced for branding changes or technical updates when funds were available. Nor were there standard templates across the product groups (other than branding requirements), so if you compared a brief across several product lines, they would contain different types of information. In many cases, legacy product documents were left in place for years without any updates on changes being made. You'd be surprised (or then again, maybe you wouldn't) at how many "Y2K" (Year 2000) documents were still posted on the portals.

Needless to say, it took sellers hours to look for basic information when preparing for a customer visit (validating several studies from industry analysts). Seller confidence in marketing was very low and complaints were very high, as was attested to by the yearly seller satisfaction surveys (or dissatisfaction surveys) that had been conducted.

At no time were we trying to get 100% adoption

The first order of business was to determine our strategy. We needed to fuse the mission set by the executive leadership with the needs of the end user, and plan an implementation strategy that would accomplish both objectives in a way that we could actually deliver within the time frame allotted. The entire project revolved around changing much of the ways sales and marketing were doing business with each other: We asked sales to change the way they looked for information and interacted with marketing; marketing to change the way they viewed and created content; we changed the way the publishing was handled and training was delivered, and changed the way IT implemented an application.

Our goal was to eliminate the multiple portals and the many team sites to simplify content searching and posting, and eliminate redundant documents. We started with decommissioning the regional and corporate sanctioned web portals targeting sales, and planned on tackling the 20+ team sites in 2009.

At no time were we striving to achieve 100% adoption and usage of the technology. We recognized early on from the sales profiles and scenarios that the more experienced sellers (who had an established network and system in place) would continue to use and rely on their tried and true methods, bypassing whatever technology and process was provided to them by corporate. We realized we would expend a tremendous amount of effort and resources for only a marginal gain. We did integrate an automated news tool that would draw them to the new SKM platform, anticipating that familiarity with the news tool would eventually lead to greater use of the rest of the features.

The changes we made between sales and marketing is worth noting as we leveraged the technology and the change management initiatives to not only bring the two functions of sales and marketing into better alignment, but to bring the sub-groups within each function into better alignment. We did this by unifying the InfoSpace (information space) for the different regions and offerings by creating associations to resources, resource types, contacts and offerings. It was amazing to see how much headway we made once we got past the nomenclature and acronym issues. We determined that over half of the fruitless searches were directly attributed to what terms folks were using to search with. One team called it a fact sheet, the other tech specs, and yet another data sheet. After analyzing the data points within each of these document types, we realized they were all pretty much the same thing.

Know your sellers

Since the SKM platform would be how the sellers experienced the sales enablement initiative, we needed to be sure we knew our audience and how they would potentially use it. This was paramount if we ever hoped to get employees to adopt the new technology and internalize the changes we were asking them to make.

Like most established companies, we had a cross mix of generations and experience levels in the selling and support roles. The organization had been spent several years acquiring companies and technologies, and more recently, had been dramatically downsizing, with reorganizations occurring at least once if not twice a year. Add to the mix the ever changing communication styles within those teams, high quantity of offerings, and two distinct customer bases (Enterprise and Service Provider): it became very clear very quickly that we needed to craft a multi-prong, multiple strategy approach to reach our audience.

We needed to know how users preferred to look for information (search versus browse), how they communicated with each other and interacted within their networks (face to face or remotely), what their preferences were for getting information (push versus pull), how they used technology, how they sold, and how open they were to change (new hires, no matter what their age, were more open to using new technology and more likely to adopt the new technologies and processes than the more tenured sellers with established networks and methods in place).

The revolving door

IDC states that sales turnover averages 10-50% and anticipates it will take two to three years for them to become successful[1].The CSO Insights" Study[7] participants confirmed that due to the changing complexity of organizations, new seller ramp up times have increased from 2003 to 2008 by 29%. This means a continual challenge of integrating new hires into your sales process (I equate it to a revolving door), as well as helping move others towards the goal of becoming a better performing seller.

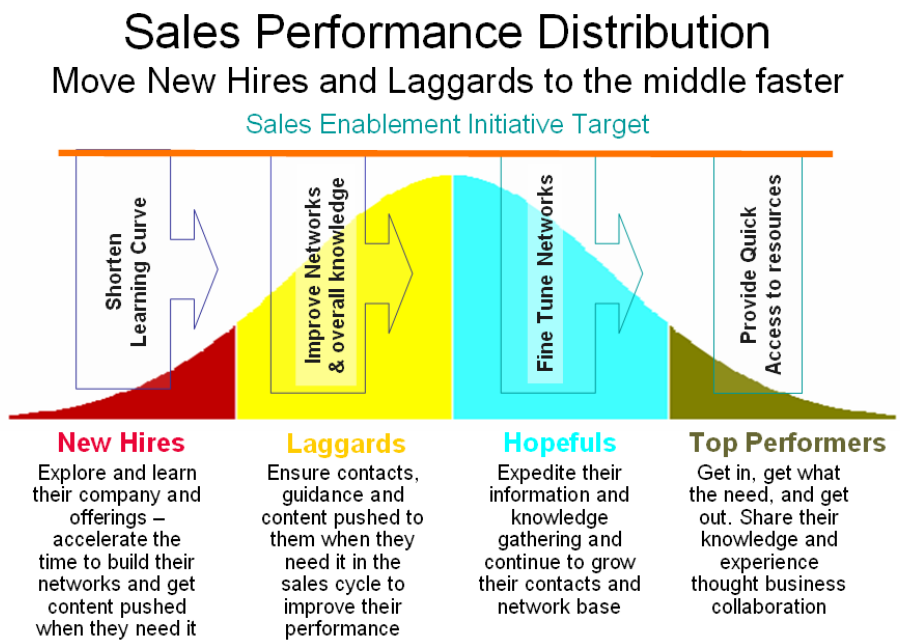
We knew that our new technology and content initiatives would help optimize everyone's time. We also believed that implementing this type of integrated sales support would help any sales person handle any sales task, event, or obstacle quickly and more efficiently. We developed and built the SKM portal to support each group in the following ways:

> New Hires: Shorten Learning Curve − Explore and learn about the company, the offerings and put everything into context. Help them get a jump start in building their networks as it can take up to a year for new sellers to get up to speed, learn the company, learn the offerings, and start building meaningful networks.
>
> Laggards: Improve Networks & Overall Knowledge − Ensure these sellers can find all the contacts and fill any gaps as they continue to expand their networks, understand relationships, and build a more solid foundation from which to sell. Many sellers need extra assistance moving from the Laggard space into the Hopeful space.

Hopefuls: Fine Tune Networks − Expedite their information gathering, but still use the technology as a check and balance if they need it. Some need additional coaching and mentoring to become more productive. The SKM Portal will help them come in contact with peers to collaborate, share experiences and identify subject matter experts outside of their networks.

Top Performers: Provide Quick Access to Resources − Get in, get what they need, and get out, but still have the technology as a check and balance if they need it. Already have established networks and processes, but the technology will help them keep abreast of corporate strategy message changes and access the most recent information.

After reviewing the history of the seller experience (from studying surveys, conducting focus groups and one-on-one interviews), developing seller profiles, and creating usage scenarios, we anticipated that the newer employees and laggards would use the SKM the most, then the laggards, hopefuls and more tenured sellers.



We made the decision not to try and push all sellers into the top performer territory (the extreme right of the bell curve); rather, we felt would be more successful and provide the biggest "bang for the buck" by shifting new hires and marginal performers (found on the left of the bell curve) the right and middle faster. The CSO Insights' survey[7] indicates that in reality, only 60% of your revenues are generated by the of the top 20% sales performers (as opposed to 80% that most people attribute), which means that you can have a tremendous impact to your bottom line by helping the other 40% of your sellers improve their close rates.

In addition to factoring in the tenure of the seller, we took the how and when people would use the technology and potential selling scenarios into consideration as well:

- Normal Users − Rarely use advance features in any application and can become frustrated by them. These folks only want to know the basics and rely heavily on support folks and training modules to accomplish basic tasks.
- Intermediate Users – Know how to do basic functions very well, and learn advanced features when they need to use them or if they see someone else doing something "cool."
- Power Users − Always use every feature available to them. These folks become experts on using the technology, help others troubleshoot and learn, and are able to master abstract concepts and very advanced features. They may or may not be programmers or system administrators.

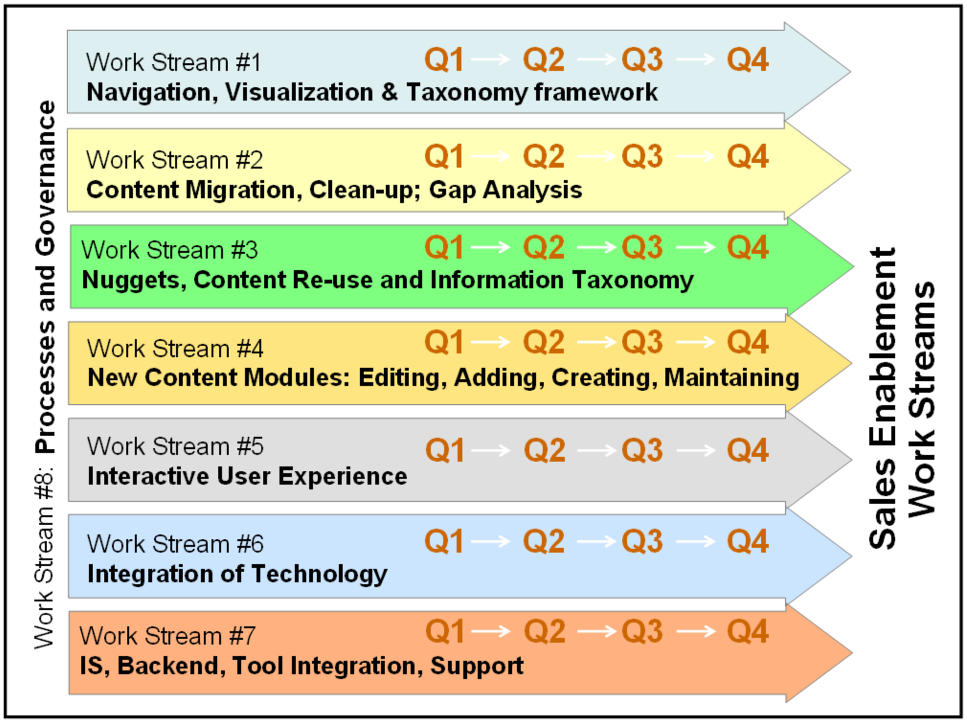
And mapped both of these to possible selling scenarios:

1. Commodity/Short Sell cycle sellers − Mainly sold to enterprises and mostly comprised of off-the-shelf or plug and play offerings. Can be sold by inside sales, direct sales, JVs or channel partners.
2. Long Sell cycle solution/service/big deal sellers − Mainly sold into companies with large user bases, like carriers, service providers, wireless, etc. May be in combination with other partners.
3. Services sales − Includes ongoing service contracts for Managed and Hosted services as well as one time installations, security, integration, etc. May be in conjunction with other delivery partners.
4. Solution sales − Many companies bundle products with other products and services (either their own or combined with partners) to provide a customer with a fuller product line and one-stop "solution" to their problems.
5. Technical Sales Support – Supports inside and direct sales force by providing the technical knowledge and understand and how things work.

Phases and Work Streams

Because of the complexity of the organization and multiple tasks at hand, we broke the project and milestones into phases and work streams. In reality, we were planning and working all of them in tandem. A priority was to implement those aspects of the sales enablement strategy that would raise seller confidence in marketing and improve seller satisfaction, as we needed to gain trust in order to lay the foundation for all of the other changes that would be coming.

Each phase continued to evolve activities from the previous phases and most of the tasks were broken into the following work streams, which were developed simultaneously: Navigation, Visualization and Taxonomy Framework; Existing Content Clean-up and Gap Analysis; Content Reuse and Information Taxonomy; New Content- Templates, Governance and Information Architecture; Interactive User Experience; Integration of Technology; and IS, Backend, Tool Integration, and Support. Training and communications crossed all the streams, as did governance and documentation.



- Phase One – Our first priority was to develop the Sales Knowledge Management (SKM) platform (BizSphere) since this technology would be the way sales would experience the Sales Enablement improvements. At the same time, we launched SharePoint 2007 as our underlying document repository system. We continued to improve the functionality of both portals throughout the life of the project, aligning features releases to content initiatives and changing end user demands. We were able to do this by using an Agile project development style, which added 10 to 15 feature and/or backend updates every three weeks as opposed to a traditional IT release that pushed 75 or 100 updates once or twice a year. We also defined a centralized taxonomy of offerings that would work globally and regionally, as well as began the InfoSpace unification (unifying definitions, terminology, templates and resource types for all regions and offerings).

- Phase Two – The second phase focused on improving the content experience, including:
    - Tool enhancements of on-demand filtering and delivery to the steps in the sales cycle;
    - Establishing accountability of adoption of the technology and content;
    - Defining the content governance model;
    - Creating the auto document generation capability and methodology of the customer presentation and other key training documents;
    - Establishing feedback loops and content rating structure;
    - Creating on-demand training modules and sessions; and
    - Standardizing five sales critical document templates.

We also implemented Click2Call into the application that gave sellers to ability to engage in unified communications, a company wide objective.

- Phase Three – Next, we focused on the content: ensuring all offerings had key collateral and contacts, SEO (search engine optimization), developing content governance and life cycle processes, releasing the first part of content rating and auto-generating key document types. This included usage metrics, monitoring behavior, identifying gaps, and reporting.

- Phase Four – Slated for 2009: development of seller collaboration and presence awareness; expanding template standardization; ranking and rating of content; launching life cycle management processes and technology; online inventory management; portal consolidation and integration; single publishing submission capabilities; partner integration; customer portal development; and adding more document generation capabilities.

PART 4: IMPROVING THE BOTTOM LINE

All of the measurable ROI (Return on Investment) for our Sales Enablement efforts contributed to the enterprise wide strategy to reduce the SG&A (Selling, General and Administrative expenses) portion of our OPEX (the measure of [in]efficiency of your business).

REDUCED SG&A BY $22M

If we look back to the 13 Top Initiatives from the CSO Insights' Survey[7], we decreased the SG&A by approximately $22M dollars just in "improving rep access to knowledge to sell effectively" and "more closely aligning sales and Marketing." We saw measurable, impactful savings from improving the productivity of our selling resources (and support staff), eliminating waste (unnecessary tasks and content duplication) and the redeployment/reduction of headcount. There was also an unanticipated benefit worth noting: increasing ESAT (employee satisfaction) of both the sellers and contributors (which was true for those areas were content was fully available).

Sales Enablement can help a company and its employees become more efficient in many ways. Because of the company's situation, I was not able to get some key data points to accurately associate dollars to all the documented savings. Therefore, I used the averages that IDC used in several of their reports to validate our assertions that implementing Sales Enablement was and is worth it.

SPECIFIC RESULTS: EFFICIENCY, TIME AND WASTE REDUCTION

If you put the right tracking measures in place, I'm sure your company will quickly see how this practice will positively impact your bottom line. You should take our savings and project what your company could save if you were to achieve similar results.

- Increased adoption rate of new sales portal by 29% in the first half of 2008 with the onset of ownership, contacts and minimum content requirements;

  Faster Ramp up for Sellers: CSO Insights' Survey indicates the time it now takes to get a newly hired sales rep up to full productivity has increased 32% during the past four years[4]. IDC states that sales turnover averages 10-50%, anticipating success in two to three years[1]. As we have stated, a Sales Enablement implementation can reduce the learning curve of new sales hires and help shift laggards to their middle of the curve by helping build their networks at an accelerated pace. It can also move less effective tenured sellers to the right of the bell curve by strengthening their networks and skills. Our assumptions were validated by examining the continued usage of the platform, which is reflected in the one month snapshot.

Snapshot from one month usage report

Years of service	% of seller base	% of log-ins
Less than 1 yr	0.06%	13.3%
1 yr	0.12%	29.3%
2 yr	0.08%	21.9%
3 yr	0.06%	21.7%
4 yr	0.04%	0.09%
5 yr	1.00%	0.03%
6 to 10 yr	26.8%	26.5%
11 to 15 yr	18.4%	17.6%
16 to 20 yr	7.9%	6.9%
21 to 30 yr	7.1%	5.8%
More than 30 yr	0.5%	0.6%

Sales, NA: discussing how an integrated strategy and a single sales portal can reduce the learning curve. *"As a new employee (4 weeks currently) our new sales enablement portal has tremendously helped me and other new employees in our department learn the product portfolios with ease... I believe it exceeds the current complex website design when you need to learn product offerings for a variety of applications very fast."*

- Reduced the amount of time it takes sellers to find value added information by 25% (reduced a 4 hour process to 3 hours per customer call);

$6,250,000	Based on 1,250 sellers and using the IDC number of $5,000 per sales person per year in fruitless searches
x 25%	Multiplied by the 25% reduction in time we achieved
= $1,562,500	Equals saving realized

Account Director, Top Wireless Phone Company in Canada ─ talking about using the sales enablement portal to find his information. *"I used it (BizSphere) today to follow-up on a number of requests related to my customer engagement. It literally took me minutes to find all the right material and get it to the customer. In the past this may have taken hours, which I just cannot afford!!! Now that's productivity."*

- Reduced the amount of time it takes sellers to create customer presentations by 33% (reduced a 3 hour process to 2 hours per presentation creation) through auto-generating documents (pre-populating key information targeted by region, segment and industry).

$7,000,000	Based on 1,250 sellers and using the IDC number of $5,600 per sales person per year in reformatting content
x 33%	Multiplied by the 33% reduction in reformatting time
= $2,310,000	Equals time saved reformatting content

Sales Engineer, EMEA ─ discussing the ability to auto-generate a customer presentation in the sales enablement portal. *"Centralizing and maintaining core presentations assure a reduction in recreating them by the masses. I think this has great potential!"*

- Sellers had access to 42% more resources available to them in one location than with the previous sales portal;

240 hours	Assuming a seller has an average of 10 customer calls a month and using the time savings of 1 hour return in being able to find information, and another 1 return in time invested in reformatting content, sellers would get back 2 hours per customer call or 20 hours per month or 240 hours per year
x 1,250	Multiplied by 1,250 sellers
300,000	Results in a return of 300,00 hours of more productive work time to the company.
x 50	Multiplied by $50.00 per hour average salary for a seller
=$15,000,000	Equals a dollar value returned to company, if money is to be associated

- Generated improvement of pre-sales marketing content through standardization of 5 key templates; Standardized naming conventions and document templates across the functional groups resulting in a reduction of document types by 45%; Improved document usage of 49% over previous sales portal;

$25,000	IDC estimated average of $25K per rep each year on training and sales assets[3]
x 1,250	Multiplied by 1,250 sellers
= $31,250,000	Cost of sales asset creation and use

- Reduced outdated information sites by 33% ─ reducing support and maintenance costs, and introduction of direct publishing methodology contributed to the headcount reduction or reassignment of 33% of web publishers.

$60,000	Average salary, based on the IDC stated an average salary of per year plus benefits
x 3	Number of web publishers reduced
= $180,000	Savings to web publishing team

Account Rep, ASIA ─ talking about using the SKM*. "I used to review 20 different websites when putting together customer presentations. Now I just review BizSphere."*

- Eliminated 64% of outdated documents; Eliminated the number of unused documents by 64%; Eliminated 51% of the documents never downloaded by sales;

$4,000,000	IDC estimate of cost to organizations per year to maintain duplicated and unused content. [3]
x 64%	Multiplied by reduction of 64%
= $2,560,000	Equates to potential savings for document maintenance and storage

- Realized 69% increase in document downloads since launch of the SKM.

$2,885	IDC's projected costs to publish a document[6] of (100 hours per document at an average salary of $60,000 per year plus benefits or $28.85 per hour in a 40-hour week)
x 1,740	Number of new documents a month (145) times 12 months
= $5,019,900	Publishing costs for year
x 64%	Of those, 64% or 1,114 documents were never downloaded
=$3,212,736	Cost the organization to create sales documents that sales does not use

- 95% efficiency gain in go live publishing time, reducing it from 80 hours to 4 hours by instilling a direct publishing model;

11,600 hours	Number of documents added per month (145) multiplied by the old publishing time of 80 hours
- 580	Number of documents multiplied by the new publishing time of 4 hours
= 11,010	Difference in time savings for new publications or a 95% efficiency gain

Product Marketing Prime, ASIA ─ comparing the traditional web posting process with a direct style of posting documents to a portal. *"Posting content myself is so much quicker. I can get documents up in hours where it would take me two to three weeks before."*

PART 5: LESSONS LEARNED

Everyone has war stories to share about this project or that project. As with all change management initiatives, there were both positive and negative forces at play; therefore, I did not go into the politics or talk about the myriad of personalities we had to deal with on a daily basis. Instead, I'd rather share some tips on helping ensure a successful implementation of a sales enablement initiative, based on my first hand experiences.

BUY VERSUS RENT

Consider carefully about how you want to bring in the SKM technology. You do have choices (purchase the application versus renting with perpetual licensing), and many products offer multiple options for your implementation. Whichever one you choose, be sure the application supports your company make up, goals and objectives. One size does not fit all and what you select should support your company's complexity and global reach. You also need to define the relationship among and between your sales applications (SKM, CRM, CMS). You are not looking to add more content repositories and application complexity, but rather put new technologies in place to manager them.

- **SKM Enterprise Landscape Deployment** – Usually recommended for a medium to large complex organization that has a multi-national or global reach, complex product line, larger sales force and/or large channel sales base. This is installed behind the firewall at a hard dollar cost. It can take longer to deploy, but is usually a better fit for a specific company need and complexity since it is customizable. If you install it using an Agile implementation, once the initial launch is over, updates will come very quickly (sometimes too quickly for your end users, so you have to be very careful what new features you add and when). Know your break even point ─ Over time, will be a cheaper option for your company once the application cost is paid for when compared to a continual cycle of licensing. Another advantage is that an unlimited number of users can access it to ensure the best user experience, since both users and contributors can see it, use it and benefit from it. This is also helpful if you want to create partner and customer portals in the future. Finally, this type of SKM is better suited to multi-regional companies as the multi-tenant approach of a SaaS won't regionalize very well.

- **SKM SaaS (Software as a Service) Deployment –** This option is probably better suited for an SMB (small to medium business) and is very compelling for companies that are sensitive to up front costs, have fewer sellers and support staff, or not sure what the end solution needs to be. SaaS platforms are subscription based business models that grant companies the right to use the software. They are accessed via your web browser. All customers share the same code (and the same bugs) and have access to the same features (they may or may not purchase them), but only see their content through the security and permissions of the hosting vendor (security is NOT a concern). All content resides on the vendor's servers and usually does not require buy-in from your IT department. This is the "rent" side of the rent versus buy choice. Depending on the size of your sales force, this can initially be a cheaper option and you can get it up and running faster. But, it is less customized as you are limited to the vendor's set of features that they have already developed. They will release new features once or twice a year, which you will probably have to pay to use. There is also the tendency to limit who can use the application due to the cost of the licenses, which limits the overall value above and beyond the sales force.

- **Retrofit an existing application such as your CRM –** Some companies are choosing to add content delivery and collaboration into their CRM platforms as a form of Sales Enablement. But keep in mind that CRM is a pipeline (wishful thinking) tool, and what is entered isn't always a realistic picture. We found that many sellers rush to enter data to reach their quotas and are not as careful as they should be entering data. Too often, they consider CRMs to be "big brother" policing. One test is to look in the tool at your CRM customers and look at how many have actual customer presentations and other specific sales collateral. You may just find a great disparity and lack of consistency from customer to customer. This option is fine to mapping content to customers and potential customers (if you can trust the data), but many folks need to see offerings in context to other offerings or services, which is not the approach taken by the CRM application. Ideally, you should have both the SKM and the CRM and tie the technologies together.

- **Bring in a federated search** – This is another popular option right now, especially for Microsoft SharePoint Shops. A federated search engine has the ability to crawl through your entire IT architecture and platforms, including web, messaging and email servers. It can also cross the silos set up in a typical SharePoint install. But, you end up with what I call the Google affect, that is, thousands of results for a search query which may or may not be relevant and useful.

Whichever type of SKM and Sales Enablement strategy you choose, be sure to keep these (not so) simple points in mind as you implement your strategy. If you do, you'll be well on your way to making a positive difference to your sales teams.

Advice from the Front Lines

1) Do your due diligence

Spend the time needed to conduct a good "discovery" of just what is really needed to make a difference to your sales force. Making assumptions, no matter how certain you are of them, can potentially waste a lot of time and money. Unless you have recently walked in your sellers shoes, you can't possibly know what is happening in the field. Times have changed. What held true last year or five years ago is probably not entirely true now.

2) Build relationships

In conducting your research, you will build some very strong and lasting relationships with your sellers. I was very surprised when I had sales engineers and sellers volunteer to help us early on with their feature requirements. They remained on our focus groups for the entire deployment. In addition, we attended our yearly sales conference and set up kiosks with laptops to showcase the application as sellers wandered around a "tool café". Those sellers that had worked with us took ownership of the application, and spent time explaining to other engineers and sellers how they benefited from and used the application. They became champions of not only the technology, but the entire Sales Enablement initiative.

But contributors need to see their suggestions are being taken seriously before they will believe, so you should:

- Regularly interact with Sales and Sales Support teams to assess their needs;
- Identify and recommend resolutions for pain points;
- Gather/analyze ongoing feedback around quality of experience with the portal and future requirements;
- Work with IT and the technology vendor to ensure that end user feedback is reflected in the roadmap and guides the prioritization of feature enhancements; Include end users in user testing and feature planning early and often.

3) Focus on the delivery of content

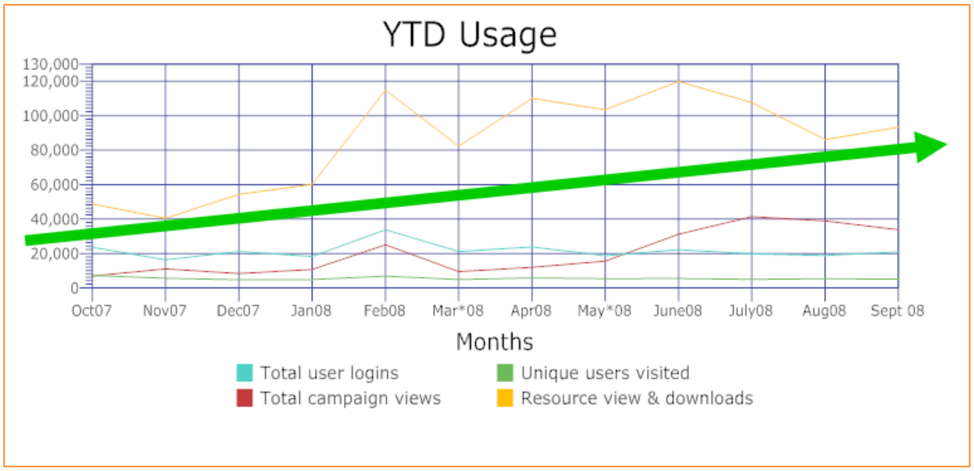
Whether you rent or buy, create a state-of-the art SKM to support the content delivery through the steps of the sales cycle (at a minimum). You should also slide and dice the content by regional availability, industry, market size, market segment, and customer type. This will then serve as the first stop for finding sales facing content. You also need to:

- Unify your nomenclature into your own InfoSpace to improve the "findability" of resources;
- Ensure all content contributors understand the importance of accurately tagging the content so it will show up when the sellers expect it to;
- Take the time to get rid of the non-essential and old stuff in the portal – it will go a long way to reestablishing trust.

4) Establish accountability for usage – it works!

Form a new role of Regional Experience Leaders within your regional teams to ensure regional content is available and to implement regional focused strategies to increase seller adoption and usage. We proved this worked by conducting a pilot in our ASIA region (the region that everyone said would never adopt the new technology) where we had an aggressive training, promotion and communication strategy in place under the auspicious of a Regional Experience Leader.

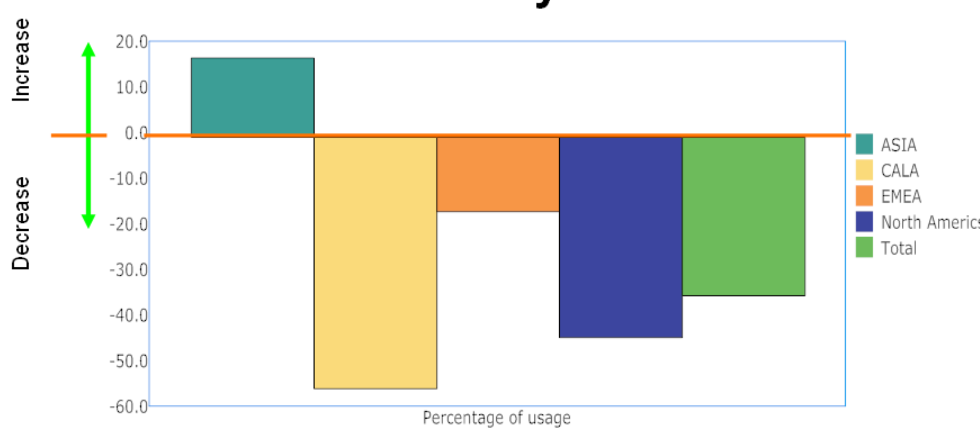
Trends Validate Value to Sales Team



5) Ensure content availability and value

Form new roles of Content Governance Leaders within the business functions to guarantee a better content experience across the sales tools, enhance communication and implement training to increase adoption of the program by the content contributors. Ensure content has an owner and is assigned to region/country and offering/function. Develop new publishing processes, content governance models and structures. Establish minimum content requirements for all offerings (even legacy products). Finally, provide seller feedback regularly to the Marketing teams regarding content needs and use.

Accountability: It Works!



6) Single source data

Standardizing templates for key document types is the beginning to single sourced content. One of the biggest fears I heard over and over from Marketing was that sellers were re-writing the content that was being given to them. Folks worried about the legality of it, as well as the comments that sellers didn't use or know proper branding, grammar or spelling. You need to let go and help sellers get the best content for their customers. They are doing it anyway, so you might as well help them get it right.

7) Auto generate key customer collateral

We started to go down the path of auto generating documents to help sellers get it right. We had several product offering customer presentations available where 80% of the slides were pre-populated. The other 20% had blank fields so sellers could fill in their own content. So, for example, a presentation for a product generated for the health care industry in ASIA would be different for the same product for the financial industry in the UK… the case studies, pictures, market data, etc. all changed depending upon the criteria chosen by the seller. What we found was that the sellers didn't alter the 80% because it was written in a customer-centric style and was the most current information available. Instead, they focused their time only on the 20%, which is what we intended. If you give them valuable content, they will use what you give them.

8) Grow a thick skin

Resistance is expected when you try and instill change – it's the nature of the beast! My feelings are that if people aren't resisting, then you aren't really changing any thing.

You will undoubtedly need executive sponsors to get the initiative going. You really need one of those executives to be in Sales—they need skin in the game to help ensure success. There are good things and bad things about being tied to executive sponsors. I equate it to being in the eye of the storm. As long as you are in the "eye", people will be skeptical, but they will usually do what you need to them to do because you are in the spot light. Unfortunately, this doesn't last forever, and as soon as the sponsor's attention focuses elsewhere, or the leave the company, you are thrown to the wolves and fair game. It is vital that you don't just rely on the top down approach. By getting actual sellers ("feet on the street") in early, we built a strong following among key influencers and users. These folks became our biggest allies and helped drive buy in from the bottom up.

9) Choose Wisely

It is very important that you choose your implementation team wisely. I chose folks who were like me and already change agents within their respective teams (or tried to be anyway). This helped quit a bit as we already were used to the push back of trying to introduce new ideas and concepts into the company (already bloodied as I used to say). The most important thing is to believe in what you are trying to achieve.

This doesn't mean everyone assigned to the project was gung ho and onboard. We had our share of skeptics and "nay-sayers" that were told they had to support the initiative. What we had to do was evaluate their comments and determine if they had merit or explain why they did not. If they did, then we did our best to accommodate their feedback and give them credit. This made them feel included in the process and gave them a stake in the outcome, the first step to establishing ownership.

10) Adoption, Adoption, Adoption

To be honest, the enterprise sellers saw more value than the carrier sellers, but that was because the sales cycle of an enterprise sale was a lot different and faster than the carrier sale (which can take several years, at least that is what I was told) and the Enterprise products were better funded and spent more time ensuring availability of content.

That being said, the old adage of, "If you build it they will come" may apply to baseball stadiums, but it doesn't apply to technology. I talked about knowing your sellers (our primary audience): how they use technology, their preferred habits, and how they sell (i.e. the selling scenarios). We spent a lot of time developing seller profiles and seller scenarios, mapping these into the company sanctioned sales process. In addition, you need to know human nature and why folks lead, follow or (don't) get out of the way. This goes to the carrot vs. the stick approach, and ties into the adoption categories defined by Everett Rogers (1962), Diffusion of Innovations, where he first described Innovators, Early Adaptors, Early Majority, Late Majority and Laggards. I like to add another category too, called, Not in Your Life Time.

You need to know how someone would be incented to use the new technology and what influences would change their decisions. Folks that will use it first are just that way and usually opinion leaders. If you can gain their trust and admiration, they will serve you well throughout the life of the project (if any of this group is a top sales performer you've hit the jackpot). Another group can be influenced by recognition and stroking their ego by holding them up as a shining examples of success. Others will follow them and the first group just because they like it and use it and are successful. Another group will use it because of peer pressure (everyone else is using it), and they don't want to stand out (the herd mentality). And still another will only start using it when their management tells them they have to use it and check's up on them. Finally, you have the small group left that needs punitive measures before they will start using it.

FOOD FOR THOUGHT

- Do your homework – understand your sellers and their pain points as you begin to create the profiling and user scenarios. Understanding the selling process and scenarios will also help you choose the right SKM implementation and platform (i.e. how customized an application do you need to fit your internal processes)
- Know your budget and limitations − it's better to attempt a smaller implementation and succeed than abandoning an initiative half way through because you can't keep the momentum going
- Create a snapshot of where you are before you begin so you can track and report on your achievements and successes, as well as the gaps
- Create a realistic delivery strategy based on your resources – don't try to boil the ocean
- Be sure to have quick wins to show progress
- Assign accountability by region, by product group, by content owners
- Educate, train and communicate throughout the entire process – be transparent
- Create an adoption strategy
- Get executive sponsors from both Sales and Marketing – you've hit the Trifecta if you can also get IT on board
- Garner buy in from the top down, the bottom up and peer to peer – just don't rely on the executive pressure
- Put sellers and marketers on the same team – even if this is temporary, it will still help remove the "us" and "them" perception prevalent in many organizations
- Keep contact lists up to date – nothing will turn sales off faster than spending time trying to reach someone who is no longer with the company from downsizing and outsourcing

ONCE SELLERS SEE THE VALUE, THEY WILL USE IT

The bottom line: it will be up to your organization to determine how big and heavy a stick to wield to get your sellers on board. We opted for the carrot using the logic that once sellers see and feel the value of Sales Enablement and the SKM, they will use it because it helps them succeed.

[1] IDC report: Best Practices in Sales Productivity: Sales Enablement. Oct 2007
[2] IDC Marketing Investment Planner 2009: Benchmarks and Key Performance Indicators.
[3] IDC's Providing the Value of Content Technologies Study, 2004
[4] CSO Insights' Sales 2.0 Whitepaper, 2007
[5] Excerpt from a presentation made during a Sales Enablement workshop held November 2008 in Chicago, Illinois by Joe Galvin, Vice President and Research Director from SiriusDecisions
[6] IDC report: The Hidden Cost of Information Work, 2004
[7] CSO Insights 2009 Sales Performance Optimization Survey Results and Analysis

About the Author

Jeanne Hellman is a published subject matter expert on Sales Enablement strategies with her first article, "A Case for Sales Enablement" http://bit.ly/3yvZQD appearing in Sales and Marketing Management Magazine, June 2009. A marketing communications professional with over 20 years experience, she has specialized in communication and collaboration technologies and techniques used to reach global audiences varying in age, culture, education and skill level. She has worked in the Public Sector, Broadcasting and Telecommunications industries. For the past three years, she has focused on the implementation and adoption of a Sales Enablement strategy in a Global $11.2B Telecom Equipment and Professional Services company. This included the development and implementation of an SKM (Sales Knowledge Management) platform; creating best practices and policies for content creation, life cycle management, single sourcing and on-demand document generation; Lean Six Sigma process simplification and technology integration; and developing on-demand training and coaching delivery programs across the organization. Jeanne currently lives in Raleigh, NC with her husband and two children.