CRM

Why your Sales Management System should be in your integrated Portal – and the benefits of embedding E-forms within Sales Management

Summary

Companies have long struggled with moving key information between their portal, document management systems and sales systems0. Modern Application Rich Portal frameworks provide a refreshing alternative – embed E-Forms and Sales Management within the portal itself, removing all the integration issues completely.

Web based Frameworks

Commercial companies of whatever nature should be passionate about their customers, sales, suppliers, partners, corporate information, processes and productivity. These are after all the basics of value in any company – get them all right, and progressing well together, and you are working on solid foundations. IT vendors have historically addressed these major areas with a series of point products and competed against each other to achieve best of breed status – leaving the customer with the frustrations of producing a viable pragmatic environment from the pieces. This has led to major investments in environments that promised some kind of interoperability – causing code inflation and overly complex applications – while vendors spent too much R&D in fitting business requirements inside Java, .Net and other attempts to improve collaboration. The result has often been perceived by the customer as a failure, with cost overruns, poor performance, unstable or needlessly complex environments, multiple vendors and poor business delivery.

Any web based framework that promises to deliver an entirely customisable framework, based on pure web technologies and independent of major vendors, databases and platforms to address all of these core requirements is bound to get the attention of the management team in any forward thinking company.

The Challenge

So why are such frameworks so rare? Surely it would be in any vendor's best interest to deliver what every company is looking for.

It is a demanding challenge to expect any one supplier to deliver a completely integrated framework, with outstanding functionality in all these areas – so that an SME can commit to deploying their business within it - yet still be enabled to capture bespoke processes, and customise the user experience to meet precise business needs.

So why put Sales Management in the portal?

Perhaps it is worth stepping back and reviewing what sales management is all about, and what sets of users are normally involved. It certainly needs to deal with, and provide relevant functionality and information for:

- Management – require forecasting across business units and awareness of key issues within the customer base
- Sales People – need dashboards, reminder system, forecasts, interaction with pre-sales teams, integrated and version controlled document management
- Pre Sales Specialists – information on the contacts and requirements within the account and a process for engaging in the account
- Product Specifications and value – determine popular products and services, provide information for manufacturing and delivery sides of the business on load requirements
- Contracts and collateral – at certain stages in the CRM workflows relevant documentation needs to be provided for contracts and support information
- Customers – a multitude of key information should be stored and retrieved to help understand where customer needs are being met, and where they are not.
- Vendors and Partners – no company is a sole supplier in the modern world, and information on vendors and partners should also be within the CRM system. Ideally extranet access provides partners with direct views into their own supply side of the CRM system.

The company portal should be the first place to find and use all of this information. Portals deal with users, information management and business processes.

So what does this mean? An independent sales system should find all this information from within the portal, – and then move it across to contribute functionality and workflows – only to have to modify data back in the portal to keep it up to date? Of course not – portals themselves should address the ***functionality*** sales management demands – in the way your company needs it – drawing on, creating and modifying data within the portal itself – and leaving that information accessible to users as required through the permission systems of the portal itself.

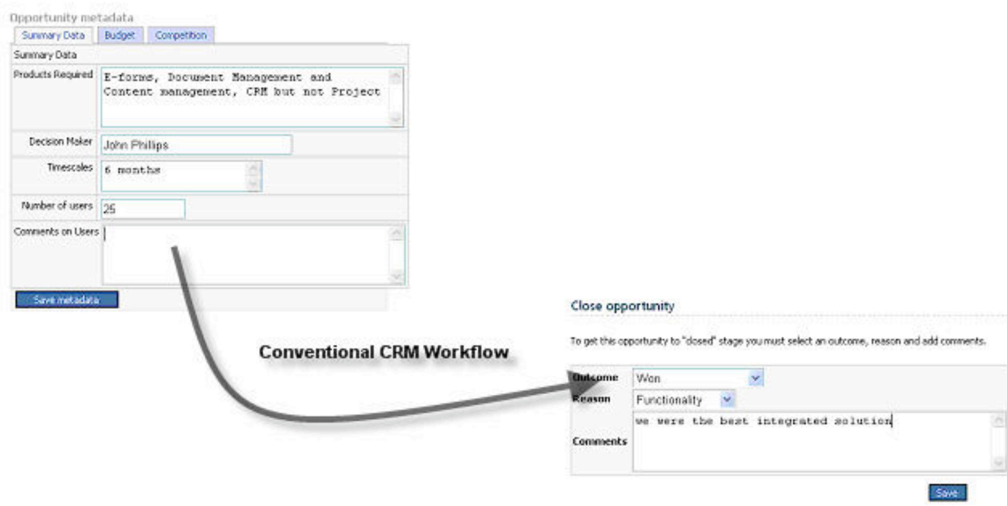
This is the key – if an integrated portal is to provide the single environment for business applications – then it itself needs to provide the relevant applications – otherwise the business will always be in the integration game to try to cope with disparate islands of information.

Not just the sales management functionality itself, but the same access to the actual data about the staff, partners, the user experience and permissions. Sales Management applications should automatically create meaningful document stores, for example, to maintain all the version controlled documents throughout the life cycle of the customer.

What About Sales Management Processes?

Modern sales management systems such as Claromentis Sales Manager will already incorporate workflows to change the opportunity metadata to meet the needs of each client as the opportunity progresses.

For example in the early stages of a customer life cycle we may only want to store some basic information, but as the stage progresses we can add additional information, including results and feedback on some key sales stages as required :



This internal workflow functionality is essential, but embedding Portal E-Form functionality within Sales Management provides a whole additional business process opportunity for managing key issues in the sales process.

E-forms within Sales Manager

In addition to tightly bound opportunity statuses addressed above very sales process for any company will involve additional processes that take place to move them along a sales cycle. These could be early phase engagements such as a tailored product demonstration or it could take place long after the company concerned has become an established client – for example to register and deal with a customer satisfaction issue.

These engagements can be dealt with effectively by an E-form approach within the portal, directly embedded within the architecture of the Sales Management system.

What is an e-form?

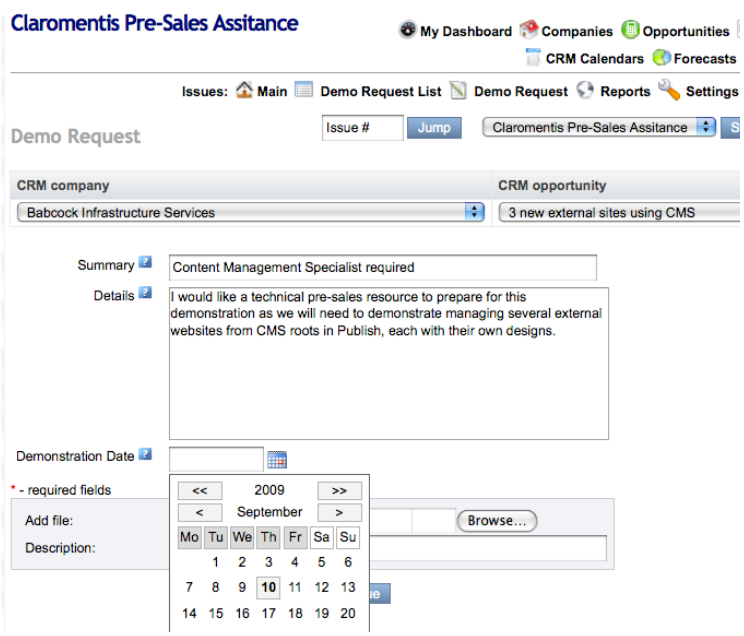
An e-form (electronic form) is an online version of a paper form. However unlike paper forms these e-forms can be managed, send automatic notifications and alerts, dynamically change and be escalated and subject to any required workflows and Service Level Agreements appropriate to the context of the form within the user community. Accurate, current, filterable reports are available for all relevant stakeholders.

This has profound implications for Sales Management, as we can capture, compare and learn about results from processed based engagements at various stages within the customer life cycle.

To make this clear, let us consider two examples – for early and late stage requirements respectively.

Early in a sales cycle – request a demonstration.

For some companies the early interaction with a customer needs definition, assignment of responsibilities amongst a pre-sales team, and reporting and management analysis. By embedding an e-form within a CRM opportunity this can be precisely achieved.



Late stage needs – customer satisfaction.

Any company, however dedicated to support, delivery and R&D is bound to find occasions where its products and services are not aligned with customer expectations.

By enabling an E-Form application within CRM you will be able to enable your customers, support staff and sales team to interact with, manage, escalate and ultimately resolve any aspect of your product or service delivery.

For example – a software company, excited about a new release, may find that one of the enhancements produces an issue on a particular platform. By empowering your customers to report such an issue directly in the portal, and providing key staff the ability to handle, manage and resolve them, your client relationship will be enhanced, and lessons learned fully available for subsequent review and analysis.

Examples of Sales Management focussed integration within a Sales Management centric portal

We have already explored some of these basic issues, but as a summary of intrinsic portal integration we can consider:

- **Availability of the specific sales manager functionality**

There must be a specific sales management application provided as part of the portal chosen for the business as a whole.

- **User access and personalised experience in a sales centric portal**

Users in a sales portal will automatically be granted access to sales territories and projects that they need as part of their user experience, as an integral part of the portal permission systems.

In addition they will have access to client or vendor key documentation, forums, notifications and many other portal based functionality that is essential to manage and collaborate through sales based workflows. They will have access to all of this information from any required location.

- **Document management in a sales centric portal**

CRM will automatically generate document stores of any required complexity for all companies and opportunities, enabling a systematic approach to client and vendor documentation.

- **Content management in a sales centric portal**

Intranet or extranet pages can be easily managed to present appropriate information to users in a clear, consistent and informative manner. With the use of components and smart objects these pages can present dynamic view of lead generation processes, demonstration requests status or any other part of the portal in a single page.

- **E-forms in a CRM centric portal**

Completely individual processes required by your company can be started and managed at any point in the sales cycle. These can involve and level of detail required, and leverage the notification and collaboration tools of the portal to optimise efficiency. The forms and processes themselves will again leverage the availability of documentation within the system.

Conclusion

An appropriate modern information portal like Claromentis can now contain all the major application sets a company needs to address Document Management, Content Management and Sales Opportunity management in a single integrated and secure environment. There is no longer any need to purchase sets of applications form different vendors, and then face the integration challenges to make them work effectively for your business.

By embedding E-Forms within sales management all workflows bespoke sales processes can be captured and enabled so that you staff and suppliers can respond effectively to opportunities and challenges.