

Why CRM Keeps Sales Reps Awake at Night

By Christopher J. Bucholtz

CRM Buyer

There's a long history of sales reps resisting CRM despite the advantages it offers. The problem is not just one for the sales department, though. If reps don't use the system, the entire company is deprived of crucial customer information. CRM evangelizers should send a message that directly aligns the needs of the sales staff with the capabilities of the CRM system.

Although service is gaining in importance as the economy is forcing customer retention to the fore, sales has long been the dominant leg of the CRM stool. Many CRM efforts were spearheaded by sales, and in many organizations, the SFA functions of CRM software remain the only features that actually get used.

That said, sales pros continue to voice problems, concerns and worries about CRM. Although enthusiasm for using CRM has increased in the past two years -- thanks to desperation brought about by the recession -- many people in sales still view it as a necessary evil, at best.

Why is this? On a basic level, it's a classic conflict at the place where humans and technology interact. The way CRM software operates and the way sales people operate are fundamentally misaligned. Here's why: CRM software requires its users to follow a set process. Data must be entered in a set sequence, and updates must be made at set stages. This relative rigidity is the exact opposite of the way many sales people work; the idea of a process that one repeats in the same way in every case is totally alien to them. Each sale is different, and the ability to be agile instead of rigid is absolutely critical in the sales process.

Further alienating sales pros is the perception that CRM data is collected not for their benefit but for the benefit of sales managers. If using the technology in the diligent way it needs to be used results in reprimands from the manager when things are going less than optimally, why would the sales person enter that data?

The Entire Company's Problem

These are the most common issues with sales people, but there are many others: the traditional resistance to change; the time "penalty" some sales reps associate with inputting data; and many others that are unique to specific vertical markets and to individual sales reps. These have been long-standing adoption speed bumps, and they were departmental headaches in the early days of CRM.

Now, however, as CRM data is being shared in every part of the enterprise, these are no longer headaches for the sales manager alone -- they threaten to skew the understanding of customers across the entire company.

Sales' full participation in a CRM initiative is critical, but trying to motivate sales people by explaining their role in the overarching CRM framework has never been effective. Their motivations are far simpler, and their concerns are far less abstract, than the ideas behind CRM. However, by understanding the things that concern them, it's possible to shape messages about the importance of CRM in ways that relate to them.

Seizing the Moment

Sales people are always concerned about making their numbers. That's only become more difficult during the recession, as quotas have risen and customers have become more frugal. CRM helps with this by making it possible to manage more leads in the same amount of time, and to have a fairly complete picture of the customer even before the initial contact. This picture only becomes clearer as sales people talk to potential customers -- as long as the information garnered from these conversations is added to the record in CRM.

While the idea of building that customer picture over time isn't necessarily appealing to the need for instant gratification common among sales people, CRM also enables things that bring immediate results.

Timing can be critical, and sales pros have had to cope with a natural delay between the detection of the activities that signal a readiness to buy and their ability to act on them. Modern CRM now includes technologies that watch for trigger activities and alert sales people in real-time to allow them to strike when the iron is hot, which results in substantially higher rates of closed sales.

Sales people worry about the tough but critical accounts but often feel like they're going it alone. Sales reps don't have the time to hear the minute details of difficult deals and thus lack enthusiasm for helping fellow reps crack the tough nuts -- they simply can't spare the time to digest all the details. CRM puts those details in a format that makes it easy to understand, and makes it far easier to help and be helped.

For sales managers, it's critical to present these things as benefits that impact the sales people directly, personally and immediately. It's critical that the CRM champion within a company help sales managers understand how to bring this message to the sales staff.

If a CRM solution provides a view of the customer, and sales people are its eyes, failure of the sales staff to embrace CRM will leave an organization blind to real customer conditions and concerns. Sending a message that aligns CRM's capabilities with sales reps' problems is the best way to open their eyes to CRM's potential to help them, and to give the entire organization the ability to see what's really out there.