

Doble Group 2012 Webiner Series
**CRM as an On-Going Strategy
for Success!**

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Today's Agenda

- *Intro to Doble Group, LLC*
- *Key CRM Success Pillars*
- *CRM is a Strategy, not a Technology*
- *Doing the Right things Right (Sales Activities)*
- *Qualifying Prospects*
- *Managing the Sales Pipeline*
- *Embedding Processes & Strategy into the CRM*

Doble Group, LLC

We are a niche consulting firm that focuses on improving business performance through highly-customized programs and innovative cloud technologies.

- 25 Years of Combined Sales, Marketing and Customer Service experience
- Proven track record for building successful commercial teams & driving business transformation with fortune 100 and international companies:



- Real world business experience and understanding of the challenges faced by commercial teams today
- Salesforce.com & SuccessFactors Certified Partner
- COPC Certified in customer service process & quality management

Cloud Technologies

SaaS: Software as a Service:

salesforce.com[®]

Registered Consulting Partner

SuccessFactors
AUTHORIZED



we make things happen



Banco BHD



Business Optimization Programs

Salesforce Optimization Programs:

Salesforce CRM Transformational Programs

Salesforce CRM Basic User Training

Salesforce CRM ADMIN training

Business Optimization Programs:

Commercial Process Reviews & Optimization

Sales Leadership for High Performance Teams

From Sales Executive to “Trusted Advisor”

Balanced Score Card Implementation

Sales Leadership Consulting, Training & Coaching



we make things happen

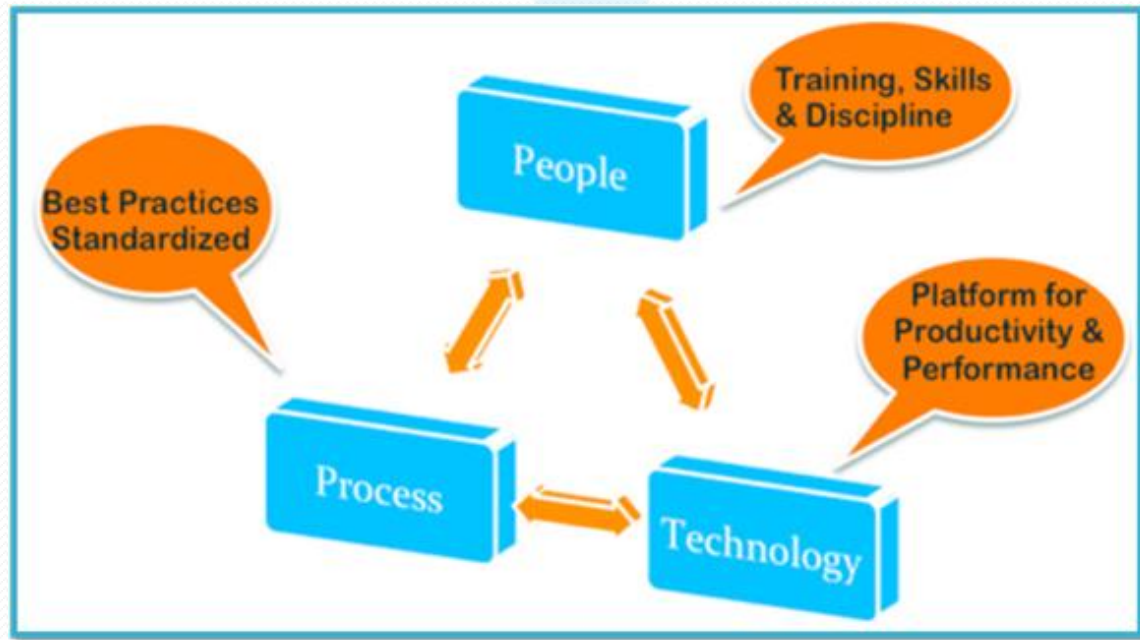


CABLE & WIRELESS



Key CRM Success Pillars

- Aligning the Sales Teams with YOUR One Best Way [Processes] and Salesforce CRM Technology!



CRM is a Strategy NOT a Technology!

CRM is about **customer relationships**, it's about how you “manage” your **customer experience** (against their **expectations**) and the *impact this experience has in your brand*.

As management, we must ask ourselves....

- ✓ Do our marketing efforts generate VIABLE NEW PROSPECTS?
- ✓ Does our sales engagement generate MORE SALES?
- ✓ Does our customer service engagement RETAIN MORE CUSTOMERS?

The Answers Dictate the Action!

Based on your responseS, there are 3 pillars for success that should be explored and seamlessly aligned:

- ***People:*** Skills, Behaviors and Disciplines to do the job “right”.
- ***Processes:*** Best Practices are a Standard (not an exception).
- ***Technology:*** The Platform to Measure Process Adherence and Business Results.

TODAY WE WILL FOCUS ON HOW CRM TECHNOLOGY CAN HELP YOU...

- 1) **DRIVE THE RIGHT SALES ACTIVITIES**
- 2) **QUALIFY LEADS OR PROSPECTS**
- 3) **MANAGE THE SALES PIPELINE *and***
- 4) **EMBED YOUR SALES STRATEGY INTO YOUR CRM**

Doing the Right Things, Right!

Multiple studies have demonstrated that employees invest most of their time in “non-productive” activities. Hence, our motto “**Everything you do has a purpose**”. By properly creating activity types in your CRM you will know who is spending time in what activities and ensure that you are doing the right things, right!

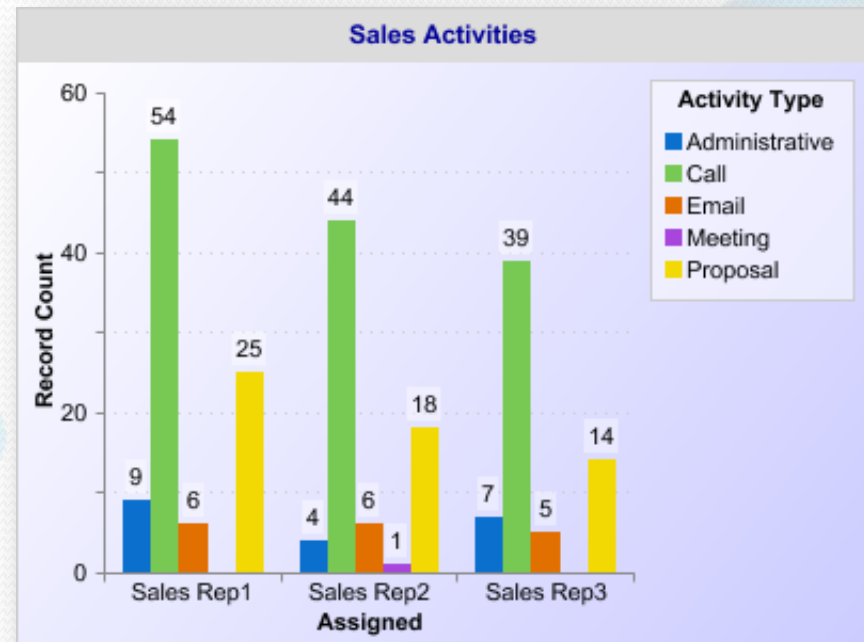
Sample of some **Key Sales Activities**:

- **Prospecting** (*sourcing new business opportunities*)
- **Discovery** (*assessing customer needs*)
- **Proposals** (*developing value propositions for customers*)
- **Negotiations** (*working on win-win agreements*)
- **Closing Calls** (*seeking business closures*)

Tips for Measuring Sales Activities

- **Know your conversion rates** (# calls → appointments → proposals → transactions). By focusing on the right activities, you will close more business! Be more scientific about selling “go get business” is not as effective as “focus on more prospecting calls to increase your pipeline”.
- **Create dashboards and reports** in your CRM to track activities by individuals and by teams.
- **Benchmark, Review & Adjust!**

Sales Activities KPI's	
John Doe KPI's	
Sales Rep \$ Goal:	\$10,000
Average Transaction \$ Value:	\$1,000
# of Transactions Req'd:	10
Contact Rate	50%
Contact to Lead Conversion Rate:	25%
Lead to Proposal Conversion Rate:	50%
Proposal to Closing Conversion Rate:	50%
# Cold Calls to Make:	80
# Prospecting Calls:	40
# of Proposals Req'd:	20
# of Closed Deals:	10



Qualifying Prospects

- Not all leads are “created equal”
- Focus your attention on leads with a higher likelihood of buying
- To qualify you need to know “what questions to ask”

Lead Scoring

Prospect Has a Budget

Purchase Time

Know Decision Maker

Know Buying Process

Compelling Event (Reason to Purchase)

New business opening this month and requires XXXXX before Feb 28, 2012!

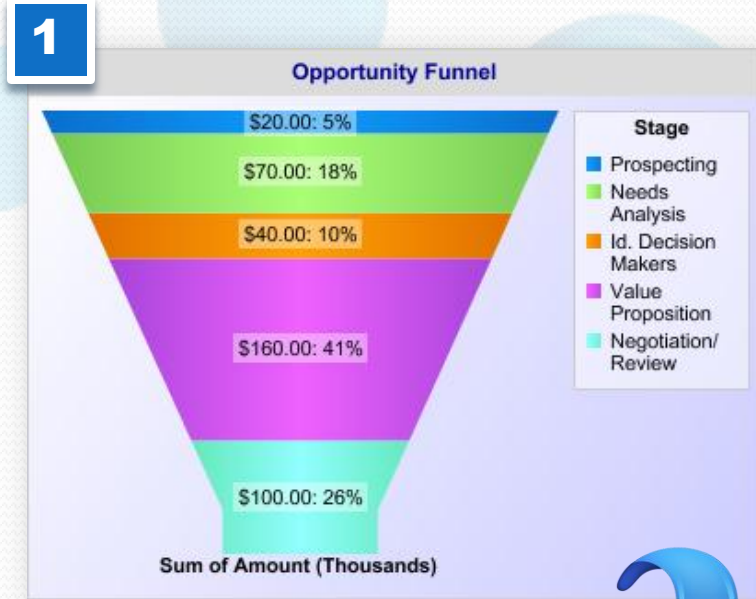
Has All Necessary Information



<input type="checkbox"/>	Action	Lead Ranking ↓	Name	Company	State/Province	Phone	Email	Lead Status	Owner
<input type="checkbox"/>	Edit Del +	★★★★★☆☆	Saunders, Miriam	BigLife, Inc.	Kingston 5	(876) 555-1212	saunders@biglife...	Contacted	Rep1
<input type="checkbox"/>	Edit Del +	★★★★★☆☆	Graciano, Johnatan	3C Construction	Florida	(503) 50055212	jgracianoj@3c.com	Open	Rep2
<input type="checkbox"/>	Edit Del +	★★★★★☆☆	Rivera, Manuel	Rivera Corredores...	Panamá City	(507) 2222-3333	mrivera@riveracor...	Contacted	Rep1
<input type="checkbox"/>	Edit Del +	★★★★★☆☆	Almendarez, Dania	Importaciones Gen...	San Salvador	(503) 5777-6655	dania@impg.com	Open	Rep1
<input type="checkbox"/>	Edit Del +	★★★★★☆☆	Ramos, Freddy	Salud Integral Caribe	Santo Domingo	(809) 335 3522	aramos@saludint...	Open	Rep3
<input type="checkbox"/>	Edit Del +	★★★★☆☆☆☆	Smith, Andres	Universal Techno ...	Barbados	(809) 555-1212	ands@unitech.com	Open	Rep3
<input type="checkbox"/>	Edit Del +	★★★★☆☆☆☆	Nova, Mario	Nova Edificacio...	Georgetown	(809) 777-5555	mparra@parra.com	Open	Rep3
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<input type="checkbox"/>	Edit Del +	★★★☆☆☆☆	González, Eduardo	Banco Progreso	San Juan	(507) 340-0300	egonzalez@pbp...	Open	Rep1

5 Basic Rules to Managing the Pipeline

- **Rule # 1:** “Pipeline Review” USING your CRM!
- **Rule # 2:** Review Stage Duration and Aging
- **Rule # 3:** Make sure you are “In it to WIN IT”!
- **Rule # 4:** Use Forecast Category
- **Rule # 5:** Make sure the “Stars are Aligned”



5

2

3

4

Opportunity Name	Amount	Close Date	Next Step	Stage Duration	Age	Opportunity Owner
Stage: Negotiation/Review (17 records)	\$320,008.50				avg 113	
Forecast Category: Commit (17 records)	\$320,008.50				avg 113	
Los Almendros Hotel & Resort Project A	\$20,000.00	2/28/2012	Feb 20: Get approval from John on discounts to close deal this month!	113	113	Sales Rep1
Hotel Montecristo Project B	\$40,000.00	3/15/2012	Feb 6: Call Bob to find out if his boss approved proposal on Feb 26th	113	113	Sales Rep2
Antilles Golf Course Project C	\$20,000.00	3/11/2012	Feb 16: Check with Andy on payment terms and get back to customer	113	113	Sales Rep3

Embedding Processes & Strategy in the CRM

- **Best practices (processes) should be part of the CRM:**
 - **Leads:** i.e. Product Interest, Qualification, Web-to-Lead, Auto Replies, etc.
 - **Opportunities:** i.e. Solution Requirements, Business Needs, Red Flags, What you Need to know to WIN, etc.
 - **Discounts & Approvals:** Discounts above threshold go to next level for authorization and audit trail is kept in CRM.
 - **Quotes:** One System for all Paperwork, Different quote versions, etc.
 - **Contacts & Accounts:** i.e. Birthdays, Hobbies, Organizational Charts, etc.
 - **Workflows:** (i.e. Triggers are set when action is required at a given phase of a process (stages))
 - **Contracts:** (i.e. Reminders are set to alert account owners of contract expirations)
 - **Re-Alignment:** As your business changes, so do your best practices....**KEEP YOUR CRM RELEVANT!**

Thank You!

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Doble Group, LLC combines sales performance improvement consulting with cloud computing technologies to improve business results for companies throughout the U.S., Central America, the Caribbean and Latin America. The company understands the importance of delivering and supporting integrated, end-to-end solutions for businesses of all sizes and is uniquely qualified to deliver these services through hands-on engagements with your teams. Our mission is to deliver holistic business solutions that deliver bottom-line results to our clients.

For more information visit: www.doblegroup.com or call us at 877-DOBLE48