

Process Automation 2017 and Beyond

People, defined as internal and external customers, want **processes** and **systems** to be simple, fast and easy to use. We, as consultative people in a sales oriented environment, want to help our customers be more **efficient**.

Process automation starts with looking at where your information is and what people are doing with that information. **Information**, whether it is a purchase order, invoice, sales order, customer record, has to be **accessible to have value**. And it's only valuable when it's in motion.

In today's blog, I'm going to talk about the **sales process**, which is always in motion. We will call this process automation for sales.

As you think about **change for 2017**, here are a few questions you can ask yourself that will help jump start next steps to automate your sales process. Are you still using an old fashioned legacy approach to prospecting or does your company have a proven methodology for prospecting? How are you keeping up with relevant activity? Are you still using separate excel spreadsheets to track pipeline opportunities and forecasts? Do you have a base management strategy related to client retention? Can you data-mine within your system to find more opportunities? What about your branding and proposal deliverables? Have you looked at taking advantage of the tools out in the market today to help you leverage social selling? These are just a few questions you can ask yourself as you work to build a strategy to automate your sales process.

Most copier dealers today use some type of CRM to manage their accounts, activities and call backs. The CRM portion of the sales process is only part of the entire strategy that makes up **process automation for sales**. Does your current CRM integrate with your **ERP system** for billing? Or do you find that you have redundancy or duplication of efforts using independent tools? Are you prospecting with a purpose and a plan or are your sales people still just making random calls to any decision maker they can find in their database? Prospecting with a purpose puts relevancy to the core activity – kind of like quality over quantity with a strategy attached to each call.

As you move from **Account Management to Pipeline Growth and Development**, it's important to look at how you are tracking your business opportunities. Today, most copier dealers have multiple revenue streams with subject matter experts often driving the sale beyond traditional hardware. Is your current system ready to track these multiple revenue streams? Does everyone with a sales goal use the same tool? 2017 will be a year for new beginnings. If everyone selling is working within the same platform, you are sure to be more efficient. This will help you eliminate redundancy with those excel spreadsheets.

If your current platform is integrated, you should be able to look deeper into how you can **leverage the information** that your data collection agent (DCA) is pulling into a customer record. Easily being able to identify volume on printers not on a service contract can help prompt relevant customer dialogue around the "uncaptured" cost of printing. This in turn will help your sales reps develop a strategy with their customers to right size, optimize the fleet and/or provide them with technology that can help track and redirect print jobs to the most cost effective or efficient device. I like to use the term to "develop a strategic roadmap using hardware, software and the correct tools" which in turn is aligned with the goals and initiatives your customer has like saving money, being more efficient, reducing waste and/or being more secure with information.

As your sales reps move through the designated sales stages, they will eventually work to prepare a **Proposal Deliverable and Customer Business Reviews**. You might want to put a “task force” together to look at samples of all the documents that are being delivered to your prospects and customers. Once you have your top 3 document templates, you may want to see if your current platform allows them to be bookmarked for easy editing for customization along with working to standardize what this deliverable looks like from a branding standpoint. Is everyone using the correct fonts and logos? Is everyone delivering a consistent message about your company? Are they still able to customize it to their customer needs and expectations? Are your customer business reviews designed to have business conversations around your customer’s goals and objectives?

Last and certainly not least is your approach to **social selling and marketing**. There are some good resources available to help you with this portion of your strategy which in turn should yield positive returns on any investments you make in your people to be more relevant selling in today’s environment.

As you plan for 2017, I wish you much success in taking your process automation for sales to the next level. As you know, the **sales process** is forever in motion!