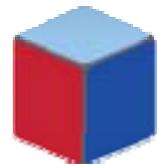
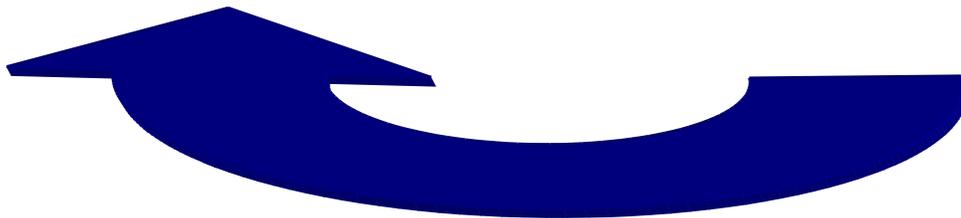


**Streamlining  
Sales  
Processes  
to  
Boost  
Performance**



## Five best practices for optimizing the sales pipeline

Sales success depends on effective sales processes. Companies that automate sales often end up automating ineffective processes. Every organization has some built-in inefficiency, which is usually caused by a failure to exploit the best tools and methods for maximizing results. When chosen wisely and used appropriately, technology can have a positive impact on both the management of the sales process and the results of managing the sales effort more efficiently. SugarCRM can remedy the gap in four crucial areas. And it does so very economically, avoiding a fifth mistake, spending more money than you have to in order to improve.

### 1. Tapping the Best Leads First

Leads, which are the lifeblood of sales, are today being generated at an ever quickening pace, thanks partly to the revolution in information technology. Firms can now supply leads that match your best customers from their databases, sliced and diced precisely for your reps and available over the Internet. Even better leads can be generated via your own Website, from visitors who either ask questions or request downloadable materials that indicate interest in your products.

Then there are leads from traditional sources. Satisfied customers can give referrals to others or indicate they have more needs your company can satisfy. Trade shows and industry gatherings yield many new leads of widely varying quality.

That's the good news. The bad news is, your competitors are enjoying the same bountiful stream. As a result, failing to quickly get the best leads to the field sacrifices sales to more nimble rivals. Yet simply passing the entire bounty on to your reps immediately may inundate them with low-quality leads, and 'lead,' so to speak, to discouragement in the sales force.

Every lead must combine contact information with all the data necessary to judge its timing and quality. And the true opportunities must be dispatched immediately to the sales rep most likely to close the deal.

Sugar imports lead contact information from a

wide variety of sources in just a few, simple steps. Sugar can import the data from Salesforce.com, Act, Microsoft Outlook, Excel, or other standard file formats. And it distinguishes raw leads from true opportunities.

Sugar's Web-to-lead form lets your web site visitors enter their own data on a pop-up form when they register, download white papers, or take other actions. Sugar then captures this data and instantly loads it into your lead files. "We import data with no problems, it's easy to do," says Bassim Hamadeh, founder and chief executive officer of University Readers, a SugarCRM customer. "And if a salesperson gets a referral, he just creates a record. He can classify it as a lead or an opportunity."

Sugar consolidates all contact information in a single location, then combines it with available account information, and uses import and de-

duplication technologies to ensure that managers have a clean and accurate view of these contacts.

And it is all done in real time. Tom Fabrizio, director of sales for Digi-Data, chose Sugar in part because his company sells through different dealer channels, and pricing is based on the initial registration of each customer. "We needed a system that updated registrations in real time," Fabrizio explains. "If a rep in California registered a new customer and a rep in New York registered the same one, we would not know who to give the registration to." With Sugar, Fabrizio knows

which rep should receive the lead and what price the rep should quote.

### 2. Exploiting Email

Email is another revolution in personal and business communications that's especially helpful in marketing. For getting a message, question, or response out quickly and inexpensively, nothing beats email. No expensive and time-consuming meetings to arrange, no worries about scheduling a conference call, and no slow paper. Just the right words tapped on the keyboard and a button pushed. The exact message gets through and stays in the files of the recipient, with no human memory required.

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These are some of the reasons why email is everyone's favorite way of sending and receiving business communications, and that's what makes it a great tool for marketing communication. The key is volume and click-through rates, as the explosion in email marketing has left a foul taste in many a consumer's mouth from undesired emails and spam.

In this environment, getting a message through and getting the right reaction to it are increasingly tough, even for individual emails. When a large organization uses email regularly, coordinating the messages, ensuring they will be read, eliciting the right responses, and judging the overall results are major challenges.

SugarCRM's email marketing tool allows marketing managers to identify the correct targets for every email campaign. It then helps them design offerings tailored to these targets that will convey the brand identity of their companies and tracks the response rates to each campaign once it is executed.

The email tool ensures that all campaigns are branded consistently and coordinated across all customer channels. Marketers will not send conflicting messages or create annoying redundancies, and the solution constantly monitors the execution of each email campaign to ensure that each offer reaches the target audience it was designed for. It checks how many emails were opened, click-through rates, and how many recipients unsubscribed.

The tool counts the leads generated by each email campaign and classifies them as either leads or opportunities for prioritized follow-up by the sales force. To keep recipients receptive to further messages from your firm, the email tool controls the lists of opt-in and opt-out email addresses. SugarCRM also gives managers real-time reports on the ROI of each email campaign and produces other critical metrics including leads created, new opportunities, and closed-won deals.

### 3. Tracking the Sales Process

For many sales, the progress from even a well-qualified lead to a closed deal can be lengthy. Each step must be correctly taken, sometimes by several reps for a major prospect, and often also by nonsales staff, to close a major sale.

But each of these individuals have other responsibilities, such as seeking other prospects, cultivating current accounts, training, reporting, and other nonrelated duties. Managers must keep everyone on the same fast track to sales. Sometimes that means setting priorities among competing responsibilities or allocating resources where they're needed.

Sugar's opportunity tracking and reporting tools track and manage multiple opportunities through real-time reporting. Managers can see charts of opportunities by team, by product or geography and then drill down to understand how each opportunity is progressing. The Opportunity Reminders feature ensures follow-through as opportunities progress across sales stages. Managers can designate certain actions that need to

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SugarCRM can be customized to mirror how your company tracks its opportunities. Or you can download extensions from the Sugar user community that will track opportunities based on your industry and company size.

Sugar's tracking goes well beyond closed sales deals. Sugar's customer-support function centralizes customer-service requests from all channels, allowing firms to manage inbound emails, diagnose bugs,

share knowledge, and resolve customer issues. "We needed a system to track our service calls and issues that was visible to management, sales and service," says Digi-Data's Fabrizio. "And operations needed to see what systems are being ordered, so they could make sure products are delivered on a timely basis. We have been using Sugar for two years, and it works great."

### 4. Spreading Best Practices

Managers not only track deals, they also track their salespeople. Which reps are cultivating which leads? Which reps are getting out the most proposals on schedule? Who is following up with customers most frequently? Most importantly, who is closing deals at the highest rate or for the biggest dollars?

These are the basic metrics that measure sales activity and success. For a small team, a

**Benefits of Adopting Sugar**

Pre-Sugar Revenue	\$50 Millions per year
Sales Team	10
Operating Margin	15%
Sugar On-Demand	\$40 per user per month

Revenue Gains	%	\$ per year
1. Tapping Best Leads Faster	1%	\$500,000
2. Exploiting Email	1%	\$500,000
3. Tracking Sales Process	1%	\$500,000
4. Spreading Best Practices	1%	\$500,000
<b>Total Revenue Gain</b>		<b>\$2,000,000</b>
<b>Gain in Operating Profit</b>		<b>\$300,000</b>
<b>Sugar Cost</b>		<b>\$4,800</b>
<b>Net Gain</b>		<b>\$295,200</b>

short sales cycle or simple metrics such as total revenue may suffice. But when a sales force is large, the process is complex and you need to know how everyone is contributing to your sales goals. Sales processes become trickier.

Commissions and bonuses will eventually be paid on top-line metrics. But management needs to know as soon as possible, not just who

is successful, but what practices are consistently leading to success. These best practices should be emulated throughout the sales force. That may mean more training, more coaching, more sharing of techniques among reps, or simply, blunt direction from management. But you can't do it until you know who is doing well and why.

Sugar's opportunity tracking lets you roll-up and analyze all the opportunities your company is pursuing. It also shows how different units or individuals are performing and what improvements can be made. Sugar Dashboards give both reps and their managers real-time information on how they're doing on new leads, opportunities, and current accounts. By defining access to these Dashboards based on the needs and responsibilities of each user, salespeople receive the data needed to evaluate themselves or their team. Automatic consolidation of sales data across selling teams gives top executives the information needed to spot the top performers, learn their best practices, and spread these throughout the sales force.

"I have a Dashboard for each salesperson," notes Hamadeh. "I know where each is on meetings, calls, open tasks and activities each day. I can get a report on conversions from cold calls for each rep. You may find a person who is doing very well, but does not know why he is doing well. With Sugar, I can see what he is doing behind the scenes."

**5. Getting Cost-effective Results**

All of these gains are clearly worth achieving. But every manager who has ever required this data knows it can come at a price. You can't spend too much time or money gathering every measurement, thus wasting your sales force's time on entering metrics. Nor can you ask your IT department to construct a mammoth new system just to perfect the screens available to line sales managers. There are trade-offs between benefits and costs.

Sugar has been designed to be affordably effective from the start. First, it is available as an on-demand service for firms that want to minimize their own IT investments. But unlike other on-demand CRM systems, Sugar can be moved inside your firm, complete with all your valuable data, and operated on your own servers.

This means that as your firm grows and infrastructure requirements change, you can mold a solution that is cost-effective and efficient.

Right from the start, Sugar offers users the ability to customize the application with points and clicks. But for organizations that require deeper customization or require Sugar to integrate with other applications, Sugar offers much more: access to the underlying source code.

Most CRM vendors have a business model based on locking-in their customers for a long period and charging them for customization. But Sugar is written in a simple and popular programming language (PHP) that allows quick and easy customization.

Moreover, there are now 60,000 users at 3,000 firms and 12,000 developers in the Sugar community, many of whom provide feedback to Sugar and develop their own extensions. As a Sugar user, you can join Sugar Forge.org and download for free almost 500 program extensions, for example, Contact Grabber or one of the translations into many foreign languages.

For a small firm that can reap just a 1 percent gain in sales— a very conservative assumption — in each of the four areas above, the gain in profit can be substantial, as shown in the example below. And, like any healthy diet, Sugar just keeps on giving. •

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## **About Faye Business Systems Group**

Faye Business Systems Group is a Southern California-based technology consulting firm and software company with over 25 years of experience in helping growing companies get “over the wall” and optimize their financial and business systems to become more profitable. FBSG uses SugarCRM, Sage MAS 90 and MAS 200, and a variety of custom software solutions to meet client needs. Services include software development, project management, packaged software implementations, custom software implementations, integration, consulting, training, and support. For more information, call (818) 227-5130, email [info@fayebsg.com](mailto:info@fayebsg.com), or visit <http://www.fayebsg.com>.

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