
Tracy Emerick

Field Sales Automation

Tracy Emerick has been involved in marketing, direct marketing and education since 1973. During that time he has worked on the client side as well as the agency service side of the business and served on the faculty of three universities and three professional seminar companies. He has functioned in all areas of sales and marketing in industries from no-tech to high tech. Tracy is a founder and principal of Taurus Direct Marketing, formed in 1981, a direct marketing agency and consultancy. He is founder and president of Receptive Marketing, Inc., formed in 1994, providing interactive Internet site development and Internet service for electronic commerce as well as database driven Internet, Extranet and Intranet customer focused applications.



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ABSTRACT

Charter Senior Fellow Tracy Emerick believes the Internet provides the first opportunity for practical, satisfying field sales automation. Using Internet communication, FSA is functional, valuable, and inexpensive. And unlike current FSA software/hardware solutions in use, Internet-based FSA is workable.

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International Society for Strategic Marketing

Introduction

The Internet provides the first opportunity for practical, satisfying field sales automation. Using Internet communication, FSA is functional, valuable, inexpensive. Unlike current FSA software/hardware solutions in use, Internet-based FSA is not the joke of the year that gets marketing and sales people fired.

FSA has been an interesting concept for years. Traditionally, FSA attempts to automate the field sales forces by managing lead (customer and prospect) information between the representative and management. The concept is simple:

1. Leads (qualified, one hopes) are loaded into the central lead system database.
2. Sales people download leads to their laptops (or receive paper output from central).
3. Sales people contact the lead and make note of the results.
4. Lead contact results are uploaded to the central system (a lead sheet is returned to central).
5. Marketing reports, sales pipeline and other management reports are run from the central system.

Like all systems, the flow chart is much easier to understand than the reality of implementation. Even the concept of FSA has some basic flaws:

1. The paper based lead cycle allows for only one iteration while the selling process can take multiple contacts over a time period seldom allowed by central.
2. For electronic solutions, all users in the field and the central office must have the same revision of the software being used and - for some systems - must have similar hardware.
3. Customer service and other people in the central office are constantly making changes and additions to the central database as contacts are made.
4. Direct marketing programs create response contacts that can update a lead.
5. Field people are talking to different individuals than the supplied lead and do not give this

information to the central system for a variety of reasons.

6. Management reports cause managers to rain terror and destruction on the sales force.
7. After one thrashing, smart sales people learn to hedge the truth or just lie to the central system to ensure survival.

None of these flaws is business threatening and no company has closed the doors because of them. But, after a decade of trying to implement FSA most companies (except route sales, e.g., Frito-Lay, where FSA supports a scheduled routine) have found the effectiveness and utility of FSA to be disappointing. These aggravating systems are cost prohibitive and little more than an electronic version of paper-based lead management system, (automation of systems that didn't work originally). The only real difference between the two is that the lies are delivered quicker using the electronic system.

The shortcomings in FSA can be boiled down to two words: asynchronous information. For whatever reason the data in the central system does not match the information in the field person's system. When the field uploads to the central system, a gatekeeper must review all records that do not match and decide which information is correct. If the gatekeeper decides the central information is correct the information is synchronous for the moment. Synchronous until either the sales person or someone in the central location makes an information change. Then the information is asynchronous.

We can't forget customer information in the FSA. Sales people spend most of their time managing customers, not developing new business from leads (another topic). Customer information maintained by customer service is different from FSA information and is often maintained in a separate database, asynchronous information.

Accounting information ties neither to the FSA used by the field sales force nor to the information used by customer service. For purposes of this

discussion, accounting will be minimized. You should be able to use accounting information to make some strategic and tactical decisions concerning the Internet as an FSA medium. However, involving accounting will not only stop rational thinking. It will stall implementation. The reality of accounting only maintaining Ship to: and Bill to: information is not within a marketer's domain to resolve. The general ledger is managed by money, the sales process is managed through behaviors, there is no need to bring these two worlds in line except for performance measurement (another topic).

Asynchronous FSA information provides management with faulty market information, delivers direct marketing communications to the wrong people, leaves customers unsupported by customer service and creates situations where the field sales person seems to be making contact with a different set of prospects and customers than the company. The results are exasperation, confusion and disgruntlement that lead to dissatisfaction, lack of trust and contempt (who's right).

The reason for asynchronous FSA information is that all the people are using information sets maintained on their own system which are, theoretically, periodically plugged together for synchronization. Doesn't work, never has, never will. An information set divided into two locations, then rejoined requires a translator, data integrity person or a gatekeeper of some sort to validate or sanitize differences. A new function is spawned called database quality manager. A function with the power to change information, with no responsibility or accountability for the outcomes the information might create (good or bad).

Internet FSA using a common information resource is synchronized. This is a model where each user: manufacturer, distributor, sales, customer service, fulfillment, telesales, telemarketing and senior management is working from the same database at the same time.

Changes to the data can be made by anyone with

password access to the customer record. All changes, additions to discussions, proposals, comments, contact dates, assignment and action steps can be seen by all people on the team. This reduces communications (phone, fax, and electronic) between and among lead generators, sales people, intermediaries, managers and sales managers responsible for lead follow-up.

Each team member is (at least in the systems we have built) notified via email about each change, update or comment added/made to the record. Each team member can also respond to the email and the response becomes a permanent part of the record. Real time updates keep everyone informed and management can generate all of the reports desired any time without calling for all leads to be returned.

The Internet FSA server is just that, a server of the information to all approved users regardless of worldwide location, 24X365. Sales people (and all others approved for access) can gain access to the lead information resource using a laptop, PC, UNIX workstation or Mac by connecting to the Internet and using a popular web browser. My experience is that training time is less than one-half hour for sales people, customer service and/or management to be effective. (Note: Connectivity issues are the stumbling blocks to Internet FSA, this can be addressed letting a connectivity company like AOL provide customer service/help desk.)

With everyone cooking in the same pot, the stew can be quite interesting. It becomes rich with information and comments, salty with heretofore uncollected input, enriched with the vitamins of collective wisdom and palatable & tasty with results through real time communications. The need for a database sanitizer, translators and multiple data processing headaches disappears. The paper chase ends. Management attention moves to behavior away from the information chase. Reduction of chaos factors (another topic) in sales and marketing allow for more time to be spent on productive selling and program implementation.

Reduced cycle time for leads to convert to sales,

better informed sales and support teams and, most important, more satisfied leads and customers are

the primary benefits of Internet FSA. Your decision.