Podcast Script: Workflows for Sales

Welcome to this 60 second Sugar snippet. My name is Susie Williams. Today we're going to brush up on some fundamental sales techniques and we'll see how we can use our CRM tool to enforce these best practices. Before you developer types hit that "fast forward" button on your iPods, have an open mind and listen to this recording for the next minute. Learning how your customers, your sales reps, use the system will help you design better tools to meet their needs.

Any good salesperson knows that in order to close that deal, you have to progress through your sales stages, moving your prospect along the sales cycle. Your company may have a well-defined set of tasks or activities that must take place in each sales stage in order to close the deal: performing a needs analysis, doing a product demonstration, negotiating the contract, and signing the paperwork are all examples of activities that happen during the sales cycle.

By using the Workflow feature of Sugar Pro or Sugar Enterprise, you can automatically set up the next set of activities when the opportunity reaches the next sales stage. If you are using the Community edition of Sugar, you can still set up activities through the application, but they won't be automatically created using the Workflow feature.

Setting up workflows is an easy task for the administrator, but it's one you want to give some thought to before you start. You should always do a task for a reason, and that task, whether it's a customer call, a follow-up note, or an interest-generating demo, should always have a purpose. Every task should be geared towards moving your prospect to the next sales stage, or to weed out a prospect who won't purchase your product.

An example: don't have a meeting with a customer without having objectives and deliverables and an outcome that determines the next step. Use the CRM tool as a reminder to yourself of what the next steps are, and along the way, you'll present yourself as an organized, prepared and polished sales professional.

An additional benefit of a well-defined sales process built into the CRM system is that it's repeatable, measurable, and able to be taught to new reps to quickly get them up to speed. As a sales team manager, you can take the best practices of your best reps and apply those techniques across the whole team. You can bring on new sales people and they won't have to start from scratch learning how to sell your product in your market. The sales process will guide them through the stages to a successful close. Those tasks will automatically be created, the tasks will be done, and nothing will fall through the cracks.

And that's your 60 second Sugar snippet. Goodbye!