

Sales 360 for Sales Performance Management

Summary

A division of a Fortune 1000 manufacturer of welding and cutting products needed a sales performance management solution to support its new sales strategy.

Business Drivers

The company was in the midst of revamping its sales model to respond to new market forces. It was instituting performance-based variable compensation for all sales and account management teams. To this end, the sales leadership was implementing a structured sales methodology that called for a highly targeted approach toward business development which included target accounts and product lines, frequent measurement of gross margins on target accounts etc. The company was also encouraging sales teams to adopt a more proactive approach in managing accounts and customer relationships.

Developing a clear line of sight between sales efforts and results was therefore critical to the management and the sales force.

Technology Drivers

The company had implemented SFA and CRM (SAP CRM), ERP (SAP) and a data warehouse (SAP BW). However, several key sales performance metrics were entered manually in spreadsheets and not captured in SAP systems. Consolidation of sales information was a key driver for the company. System usability and integration between different data sources was another important technology driver.

Key challenges

The company's sales force and leadership were looking for insight and guidance from their IT investments that would help them in directing their time and sales effort in the right area.

A major challenge for sales users was that their sales planning and performance management process required data from several systems and not just from CRM. However, asking users to navigate through different systems, screens and non-standard reports meant poor system adoption and extensive training efforts.

Project objectives

- Role-based access to sales data – driven by organization hierarchy
- Minimal data entry and high usability
- Integration with Microsoft SharePoint, SAP CRM, ERP and BW data.
- Ability to update opportunities in SAP CRM system in real-time
- Visually rich application – interactive heat-maps and charts
- Single Sign-on for users

"A clear line of sight between sales actions and efforts"

Solution: Bridge-x Sales 360

The company chose Bridge-x Sales 360 as the solution for delivering a comprehensive role-based view of the sales organization. The solution was built using SAP Netweaver CE platform and Service-oriented Architecture.

Bridge-x Sales 360 allows the company's sales representatives, regional sales managers and senior leadership to update and view, in real-time, sales orders, backorders and opportunities by product lines and geography, monitor sales activities that are out of step with the sales methodology, review and analyze sales pipelines, activities and trends and track sales expenses against new revenue added for each account.

"One-click view of your entire territory - sales orders, back-orders, opportunities, activities, sales expenses, profitability and analytics"

Instead of preparing weekly sales reports using spreadsheets and presentation slides, sales users now collaborate with their managers in real-time for territory planning with the help of Sales 360. While doing so, users can update opportunities, with real-time, automatic updates to the backend CRM system.

Solution implementation highlights

- Collaborative effort between Bridge-x and customer's teams
- From re-engineering to gap analysis to deployment in less than 6 months