



Part one of a multipart series

Pushing the Envelope on Collaborative Sales Planning

Benchmarking sales targeting processes against the state of the art can put your organization on a pathway toward increased customer satisfaction and efficient operations.

Executive Summary

Over the last decade, we have worked closely with sales operations professionals to drive excellence in sales execution in a variety of industries, ranging from B2B to B2C retailers, with sales teams as large as 5,000 members to small groups of 150 salespeople.

The overwhelming majority of our clients – as well as gurus who specialize in the sales operations – have cited the sales planning process (variously called sales deployment, targeting, alignment and account assignment) as the foundation for suc-

cessful field execution. This process should be complemented by the right incentive model. This is where the rubber meets the road - and where corporate strategy meets tactical execution. We have also found that the sales operations group has an unenviable task on its hands: Striking a balance between driving strategy and delivering customer service. Key challenges that we have observed in companies working to optimize their sales planning process can be summarized in Figure 1.

This paper defines the key dimensions where we see opportunities for the sales operations organization to push the effectiveness envelope of

Sales Operations Challenges

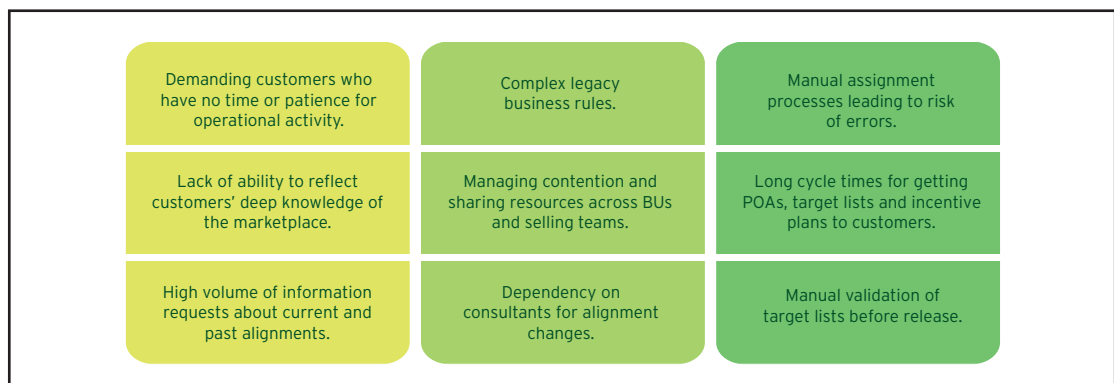


Figure 1

their sales teams. In future installments, we will cover each of these dimensions, including illustrations of innovative sales operations teams, with the objective of inspiring similar success in your organization.

Overcoming Obstacles

While sales force automation (SFA) platforms appear to be the place to address these issues, these platforms are not designed to serve the needs of sales planning. SFA solutions are intended to manage the execution of sales activity rather than sales planning. They have limited business rule processing capability, contain abstract database schema and require a small number of talented developers with the right skills.

Sales organizations typically respond to these challenges with a broad range of solutions. These approaches include:

- Distributing spreadsheets to salespeople, asking for input via e-mail and then reconciling all inputs in a master spreadsheet.
- Engaging consultants to run the same broken sales planning processes on their behalf.
- Building custom applications on proprietary SFA platforms.
- Developing custom applications to enable sales teams to align on targets.
- Implementing robust, but very expensive, business process management (BPM) solutions.

Working with sophisticated, forward-thinking sales operations teams, we have helped our clients improve the efficiency of sales operations and add value to the sales process. Our efforts are spelled out across numerous dimensions in Figure 2.

Driving Sales Operations Excellence

Dimension	Typical Practice	Best Practice	Beyond the Envelope
Changes to conventional geography and map-based changes	Offline system to manage ZIP code and geography/route-based changes.	Rule-based online system to manage ZIP code and geography/route-based changes; managed by sales operations personnel.	On-demand changes to targeting reflected in compensation and SFA platforms in real-time.
Structural/hierarchy changes to selling teams	Offline manual process; long processing times.	Online platform to run what-if analyses, balance workloads and make informed decisions, manage past, current and future alignment.	Intelligent systems that enable sales leadership to identify opportunities for structural change.
Alignment and targeting business rules	Business rules implemented on multiple platforms (SFA, ERP, HR), with cumbersome code and little traceability.	Robust, flexible rules engine to declaratively manage assignment, inclusion, exclusion business rules.	Single enterprise business rules platform to support all sales operations processes (alignment, targeting, compensation eligibility, promotional spend, etc.).
Change governance and workflow consolidation	Verbal and e-mail approvals; no clear demarcation or audit trail to determine who approved what and why; large volume of XL files.	Auditable governance framework and workflow engine that clearly states who approves what, why it was approved and when.	Mobility-enabled workflow platform that can offer sales leaders access to real-time information about changes for quick decision-making and execution.
Customer management (local intelligence incorporated)	Conflicting input from field incorporated manually into MDM environments.	Seamless integration of field intelligence on customers incorporated rapidly into the sales planning process.	Integration of vast qualifying data sources to enable reps to validate their intelligence and facilitate better targeting.
Sales rep assignment to territories	Manual, isolated assignments or extensive use of spreadsheets; legacy systems requiring long wait times to make a change.	Intelligent platform that matches reps' qualifications, relationships and account potential to optimize deployment.	
Reporting and analytics	Limited and often conflicting reporting coming off multiple systems or through manual processes.	Real-time reports reflecting all changes requested by field and leadership.	Profitability-based recommendations that help the leadership team make quick, informed decisions.
Effective communication with upstream and downstream systems	Poor communication; a single change takes months to flow through into downstream systems.	Better, but downstream systems out of sync; alignment extract format not compatible with downstream systems.	System that communicates changes to downstream systems in real-time.

Figure 2

In this paper, we have created a framework to compare the current capability of your sales operations platform and process with other sales operations teams. We invite you to make your

own assessment on these dimensions, and as we go forward in this series, we will share innovative solutions that are being deployed to close the capability gaps.

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About Cognizant

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