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# 10 Convincing Reasons for Sales Reps to Commit to SFA

Greater convenience, efficiency and sales are yours — if you can get past SFA fears.

By **Pam Baker** on **March 24, 2008**

No matter how many times or ways management claims “resistance is futile,” **salespeople** continue to oppose adopting **SFA** (Sales Force Automation) tools. For the most part, salespeople see a two-pronged problem with SFA: It is a spy tool for **management**, and it is a cumbersome burden in their already overloaded workday. To change this perspective and promote acceptance of one of the most promising tools available to corporations, experts say managers should demonstrate the real benefits of SFA to sales representatives.

“There’s really only one way for them to be convinced of the value of SFA ... if they make more money using it than not using it,” said Steve Willson, partner at **Panoptika Inc.**, a Toronto-based boutique consultancy.

Experts gave the following 10 reasons for salespeople to commit to SFA:

- 1. It provides customer-account ownership guarantees.** “Your personal ownership and control of customers and contacts will be the same or better — customers will be marked as yours, others won’t be allowed to mess with them, management won’t randomly reassign them to others, the ‘rules’ management use for reassigning customers to balance workload and/or to maximize collective revenue will be fair and stable,” said Tim Williams, systems architect at **Raytheon Co.**
- 2. It will be easy to learn and use.** “The software has been chosen for its intuitiveness. You won’t have to take out time from selling to learn how to use it,” added Williams.
- 3. SFA offers automated pipeline management.** “No more Excel funnels ... enough said,” laughed Jon Graham, senior account executive at **Artifact Software.**
- 4. Let management do the scuttle work.** “Executive dashboards let management monitor, rather than you having to report, and that saves you time and hassle. And, who knows, they may actually be able to help you,” added Graham.
- 5. Your data will be safer.** “Everything will be tightly **security-protected** and backed up. No one will be able to steal your data,” said Williams. “You won’t be able to lose it, either!”
- 6. SFA offers more complete and timely notification of relevant events.** “If anyone has contact with your customers — for example, when you’re out of the office — you will get to find out about it more quickly and reliably. Likewise, if a compelling event occurs, such as an **up-sell** opportunity, a complaint, a supplier-quality problem or a delivery-logistics issue, you will be notified almost immediately,” added Williams.
- 7. SFA provides quick conversation and communication history.** “[It takes] two seconds to know the entire history of any given client, which makes you look really on the ball to the customer,” said Graham.

**8. You control the process.** “Process produces results; repeatable processes improve business; and improving business equals job-growth opportunities and wealth,” added Graham.

**9. SFA offers more convenience.** “You will be provided with a more convenient, more **portable device** such as a PDA, a tablet or a smartphone, something you can write on or speak into rather than rushing back to the office to fill out forms. You will be able to tailor the way you use it and customize the screen layout the way you want to,” said Williams.

**10. SFA provides lead-generation traceability.** “Knowing where your wins come from can lead to focused marketing, improved sales and more money in your pocket,” said Graham.

But the No. 1 reason most salespeople will gladly embrace SFA is a true gem: “Sales management won't hover over you all the time, **micromanaging** your priorities and how you're handling your accounts,” said Williams.

“By using the SFA tool, you are proving you're a professional and management is more likely to trust your forecasts and let you manage your priorities,” he added. “They will, of course, inquire about variances — perhaps using an online form that you can answer when you have time. They won't, however, hit you with random requests for status updates.”

At the end of the day, adoption of SFA by salespeople boils down to whether it is a helpful tool. “If I can clearly see how the ‘system’ will help me sell more, save me time or take less effort than what I currently do, I will use it. If I can't, I won't,” confessed Tony Latimer, Asia's sales coach at **The Really Big Impact Company**.

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